

SPAN[®]

Installer Playbook | Installing large electrical loads



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Introduction

Congratulations on being a SPAN Installer!

This playbook contains key messaging, sales / marketing resources, selling scenarios, and helpful links to help you successfully sell and install SPAN alongside projects where customers are adding large electrical loads to the home.

To make the best use of this resource, please ensure that your team has completed technical and sales training on the [Tech Portal](#).



For any questions on this resource please reach out to your SPAN Sales Representative

Why SPAN?

SPAN enables the most streamlined process for homeowners that saves them money and time whenever they are planning to add large electrical loads to their home.

Please see below for key sales messaging when communicating SPAN in your sales processes and marketing material.

Primary messaging

Do it once, do it right

Skip the costly electrical utility upgrade and do it right the first time with SPAN. SPAN automatically balances the electricity in the home, making it easy to add major appliances like EV chargers, heat pumps, and induction ranges whenever customers need to, without the unnecessary electrical utility upgrade.

Supporting messaging

Save thousands in extra costs

SPAN Panel's integrated PowerUp™ technology allows homes to add major appliances while maintaining their current connection to the electrical grid, no electrical utility upgrade required. SPAN streamlines all current and future home improvement projects by intelligently managing the home's energy.

- Save thousands by skipping costly electrical utility upgrades
- Install cost saving appliances without unnecessary additional electrical work

Skip the hassle & cost

SPAN monitors 100% of the home's energy usage to automatically avoid the home exceeding its service limits. SPAN's proprietary energy management software is designed to keep the home safe, and powered regardless of your current electrical utility size.

- Skip costly and time consuming electrical utility upgrades
- Add major appliances whenever customers want by installing SPAN

SPAN Pro Tip



Did you know that you can grow your business with SPAN through free leads and cash rebates to reinvest into your business?

Learn more by emailing your SPAN Sales Representative or by emailing installersales@span.io.

You're ready. Your home isn't.

SPAN is built by a team of energy experts to be ready for today, and set for tomorrow. SPAN's innovative software and design ensure your home's electrical systems evolve with you.

- Purpose built by a team of energy experts
- An electrical foundation that evolves with your customers
- Help customers be ready for tomorrow, today

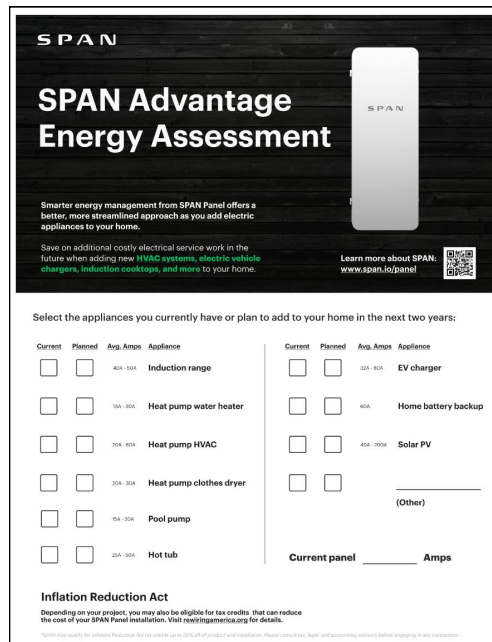
Using SPAN PowerUp for Service Upgrade Avoidance

When adding a large load to the home, it is essential for you and your customers to understand how **SPAN's PowerUp** technology can help the homeowner avoid a costly and time consuming electrical service upgrade.

Use the two resources below to help your customers understand the implications that adding a new electrical load has on the electrical service size of their home and how SPAN can help homeowners avoid a service upgrade when installing a new load, or prepare them to avoid a service upgrade down the road as they continue to upgrade their home.

SPAN Advantage Energy Assessment

Use the **SPAN Advantage Energy Assessment** with your customer to learn more about the electric appliances they have or plan to add in the future and the implications that the new loads will have on their electrical service needs. Talk to them about installing SPAN can help them avoid a service upgrade now, or prepare their home to avoid one in the future with any additional loads they plan to add.



The image shows a digital form titled "SPAN Advantage Energy Assessment". At the top, it features the SPAN logo and a photograph of the SPAN Panel. The text on the form explains that smarter energy management from the SPAN Panel offers a better, more streamlined approach as you add electric appliances to your home. It also mentions that saving on additional costly electrical service work in the future is possible when adding new HVAC systems, electric vehicles, chargers, induction cooktops, and more to your home. A QR code and the website "www.span.io/panel" are provided for more information.

Select the appliances you currently have or plan to add to your home in the next two years:

Current	Planned	Appl. Amps	Appliance	Current	Planned	Appl. Amps	Appliance
<input type="checkbox"/>	<input type="checkbox"/>	40A - 100A	Induction range	<input type="checkbox"/>	<input type="checkbox"/>	120A - 200A	EV charger
<input type="checkbox"/>	<input type="checkbox"/>	15A - 30A	Heat pump water heater	<input type="checkbox"/>	<input type="checkbox"/>	40A	Home battery backup
<input type="checkbox"/>	<input type="checkbox"/>	30A - 60A	Heat pump HVAC	<input type="checkbox"/>	<input type="checkbox"/>	40A - 100A	Solar PV
<input type="checkbox"/>	<input type="checkbox"/>	30A - 30A	Heat pump clothes dryer	<input type="checkbox"/>	<input type="checkbox"/>		(Other) _____
<input type="checkbox"/>	<input type="checkbox"/>	15A - 20A	Pool pump				
<input type="checkbox"/>	<input type="checkbox"/>	20A - 30A	Hot tub				

Current panel _____ Amps

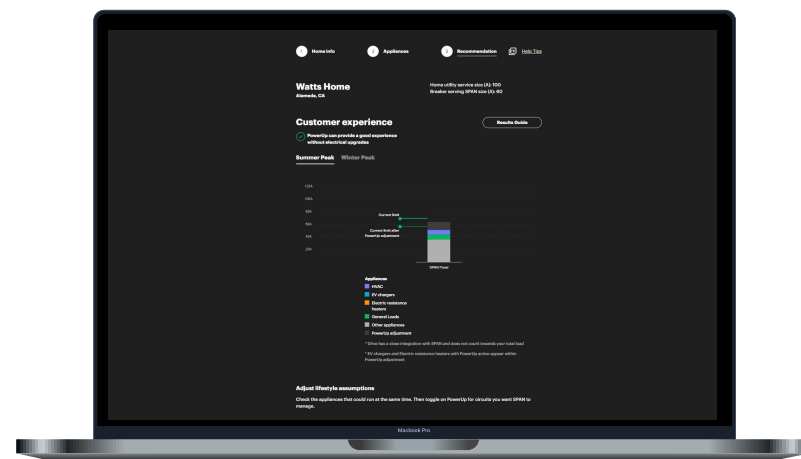
Inflation Reduction Act
Depending on your project, you may also be eligible for tax credits that can reduce the cost of your SPAN Panel installation. Visit www.irs.gov/energy-efficiency for details.

SPAN PowerUp Project Planner

Use the **SPAN PowerUp Project Planner** to run load calculations for your homeowners to determine whether they will need to upgrade their service, now or potentially in the future. Simply add information about the home's electrical system and the appliances customers are planning to add, and the PowerUp project planner will determine the optimal experience for your homeowners.

To learn how to best use the PowerUp Project Planner Tool, please reference the video and quick start guide below:

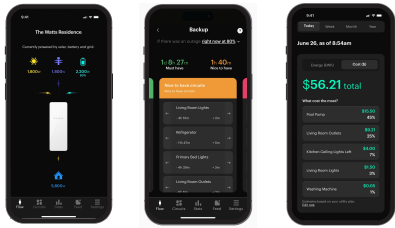
- [SPAN's Project Planner Online Tool Video](#)
- [PowerUp Quick Start Guide](#)



*"Sensational product to work with... The PowerUp project planner is now our company's standard load calculation tool. It makes a huge difference in helping us standardize across the business."
-Tom D., SPAN Installer Partner*

SPAN Sales & Marketing resource guide

There are a number of resources available to you to help highlight the value of SPAN to your customers, from our simulated app experience, to flyers, brochures and videos

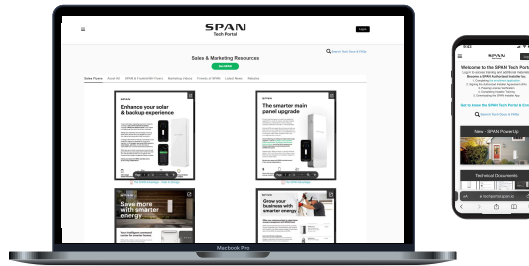


SPAN Home App

What Download the [SPAN Home App](#) on your phone/tablet for a simulated SPAN experience, and encourage your team and prospective customers to do the same!

- [SPAN Intro Video](#)

Why Show your customers the SPAN difference. No need to create a login, the SPAN Home App includes a free simulation of the home energy monitoring, battery backup prioritization and circuit-level control, and insights from SPAN that help homeowners learn from their usage patterns and save on their energy bills.



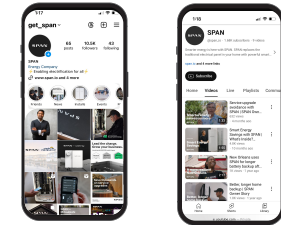
Sales & Marketing Resources

What The [SPAN Tech Portal](#) is your one-stop-shop for all SPAN [Sales & Marketing](#) resources, such as flyers, brochures, images, videos, technical data sheets, website content, social media content and more.

- [Homeowner Flyer](#)
- [SPAN Advantage Flyer](#)

Why Customers may ask you for more information or documents on what sets SPAN apart from traditional electrical panels. The flyers linked above from the [Sales & Marketing](#) section contains resources to provide more information

Pro Tip: Use the [SPAN AI SearchGPT function](#) to ask any question you have about SPAN and/or available resources in the portal!



Social Media Videos

What Our customers say it best! Encourage customers to explore our content on social media for owner stories and experiences with SPAN.

- [SPAN Intro Video](#)
- [Service upgrade avoidance with SPAN | SPAN Owner Story](#)

Why Video content helps bring our message to life and can be found across our [YouTube](#) and [Instagram](#) channels. Embed these videos on your website, social, email and other marketing channels to highlight the usefulness of SPAN across scenarios, and the benefits homeowners experience each and every day.

Selling SPAN to your customers | The SPAN Advantage Flyer on Tech Portal

Why

When adding a large load to the home, the project often requires a Main Panel Upgrade or an electrical service upgrade. This is your key resource for highlighting why SPAN is a no brainer when having to upgrading a main panel or when faced with an electrical service upgrade either not or in the future.

What

Use the **SPAN Advantage** flyer in your sales process to share and leave with customers to highlight the value that SPAN adds to homeowners vs. a traditional panel. This is a powerful resource to help clearly highlight the benefits of SPAN.

How

Provide this flyer to customers when they are planning out their project, leave behind at events, attach to email follow-ups, embed on your website etc. This flyer is available on the **SPAN Tech Portal - Sales and Marketing Resources Section** and has an area for you to add your logo on the bottom right corner of page 1.

SPAN

The smarter panel upgrade

A home's electrical panel will need to be replaced or upgraded for a variety of reasons, including installing new appliances, adding electric vehicle charging, meeting current electrical codes, or improving safety.

Adding a SPAN smart panel to your home can help you save money on your energy bills and be fully prepared for future home upgrades—all at a reduced lifetime cost of ownership, and a similar installation cost to that of a traditional electrical panel.

If you're planning on making any major home energy upgrades—such as installing a heat pump HVAC system, water heater, EV charger, solar panels or battery backup—now is the time to prepare your home by replacing your electrical panel with a SPAN smart panel.

Upgrading your electrical panel is a once-in-a-lifetime decision. Don't settle for outdated technology; choose SPAN, the most innovative home energy management solution available today.

Harness your power with SPAN, and take control of your energy independence.

Save with home energy insights Monitor & control every circuit Prepare your home for future electrical upgrades

Experience what it's like to live with SPAN
Scan to download a simulated SPAN Electric Home.

App Store Google Play

The SPAN Advantage

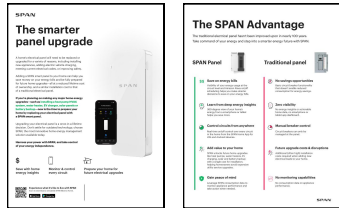
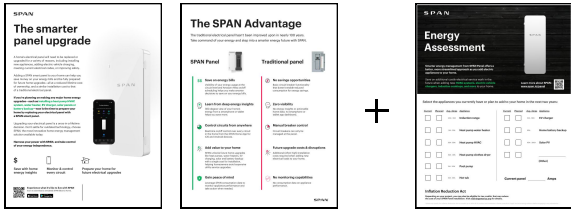
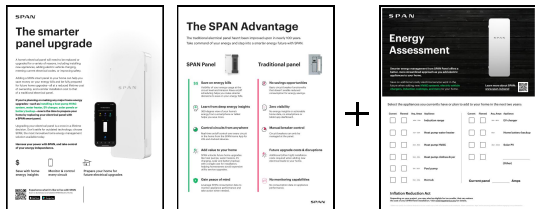



The traditional electrical panel hasn't been improved upon in nearly 100 years. Take command of your energy and step into a smarter energy future with SPAN.

SPAN Panel	Traditional panel
Save on energy bills Visibility of your energy usage at the circuit level and Amazon Alexa on/off scheduling helps you make smarter decisions to save on your energy bills.	No savings opportunities Basic circuit breaker functionality that doesn't enable reduced consumption for energy savings.
Learn from deep energy insights 360-degree view of your home's energy from a smartphone or tablet helps you save more.	Zero visibility No energy insights or actionable home data on smartphone or tablet app dashboard.
Control circuits from anywhere Real-time on/off control over every circuit in the home from the SPAN Home App for iOS and Android devices.	Manual breaker control Circuit breakers can only be managed at the panel.
Add value to your home SPAN unlocks future home upgrades like heat pumps, water heaters, EV charging, solar and battery backup with a single cost for installation, helping homeowners avoid expensive utility service upgrades.	Future upgrade costs & disruptions Additional (often high) installation costs required when adding new electrical loads to your home.
Gain peace of mind Leverage SPAN consumption data to monitor appliance performance and take action when needed.	No monitoring capabilities No consumption data on appliance performance.

SPAN

Selling SPAN to your customers | Utilizing Tech Portal Resources

Follow this guide when working with your customers so you know when to leverage SPAN resources in your sales process based on what they are hoping to accomplish. SPAN is a useful solution for a number of scenarios and use cases for customers.

Scenario	Is a service upgrade needed to complete the project?	Is electrical work required to complete the project? E.g. Is the homeowner's panel out of code? Out of date? Out of space?	Does the homeowner have plans for additional loads in the future?
SPAN Solution	<p>Offer SPAN 100% of the time instead of a Service Upgrade</p> <ul style="list-style-type: none"> Keeps the project moving with minimal delays Saves time and money (\$2,000-\$20,000) for the customer 	<p>Offer SPAN 100% of the time when a MPU is required.</p> <ul style="list-style-type: none"> Customer pays only once for labor; smaller incremental add Softens the blow for the standard MPU cost with added SPAN value 	<p>Offer SPAN as an upgrade option when a sub-panel is required.</p> <ul style="list-style-type: none"> Customer pays only once for labor; smaller incremental add Control and visibility of energy consumption of appliances for monthly saving
SPAN Sales Solution (Flyer)	<p>Use the SPAN Project Planner to show how the additional load(s) have triggered a service upgrade. Share the significant benefits that SPAN offers over a traditional electrical panel with the SPAN Advantage flyer to highlight the cost savings, and improved energy management experience with SPAN.</p>	<p>Highlight the significant benefits for future cost avoidance that SPAN offers over a traditional electrical panel with the SPAN Advantage flyer. Share the SPAN Advantage Energy Assessment Checklist to show how they may need to upgrade their electrical service size; they can install SPAN now to avoid additional costs upgrade costs in the future.</p>	<p>Highlight the significant benefits for future cost avoidance that SPAN offers over a traditional electrical panel with the SPAN Advantage flyer. Share the SPAN Advantage Energy Assessment Checklist to show how they may need to upgrade their electrical service size; they can install SPAN now to avoid additional costs upgrade costs in the future.</p>
	 <p>Link to resource</p>	 <p>Link to resource Link to resource</p>	 <p>Link to resource Link to resource</p>
SPAN Sales Solution (Video)	<p>Share a video from a SPAN customer that speaks to immense cost savings when installing SPAN to bypass an electrical service upgrade. SPAN has helped countless customers save tens of thousands of dollars by avoiding service upgrades.</p>	<p>Share a video from a SPAN customer that speaks to the benefits of SPAN over a standard panel for the ability to save money when they decide to add more electric appliances to their home.</p>	<p>Share a video from a SPAN customer that speaks to the benefits of SPAN over a standard panel for energy monitoring & control to save on electric bills.</p>
	 <p>Link to resource</p>	 <p>Link to resource</p>	 <p>Link to resource</p>

Selling SPAN to your customers | The SPAN App

The SPAN Home App is an excellent sales tool (available via the [Apple App Store](#) or [Google Play store](#)) for your team or prospective customers to download and enjoy a simulated SPAN experience.

Please see below for the best ways to demonstrate the SPAN Home App in your sales conversations, and also reference and share the [SPAN Home App Quick Start Guide](#) for video content on useful features.

More control. More power.

Homeowners can use the SPAN app to make real-time energy changes at the circuit level to suit their needs. Remotely turn on/off any room or appliance in your home for unmatched flexibility and bill savings.



SPAN Pro Tip

Encourage customers to download the [SPAN App](#) to experience a simulated SPAN Home on their own



Experience SPAN on your device
No credit card or account needed



SPAN paired with battery backup:

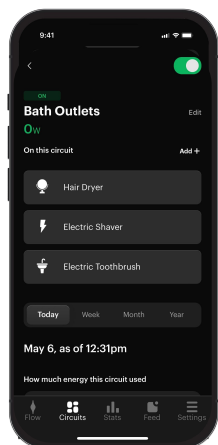
SPAN paired with SPAN Drive EV Charger:



Track every last watt

Flow section

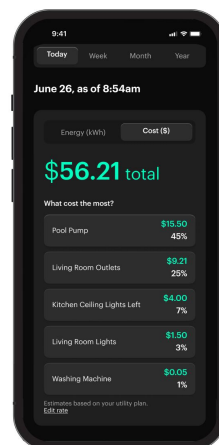
The home flow screen provides visibility into whole-home energy usage and solar panel energy production—centralized in the SPAN Home App.



Power what matters

Circuits section

Turn circuits on/off from anywhere to save money and avoid emergencies.



Never waste a dollar

Stats & Feed sections

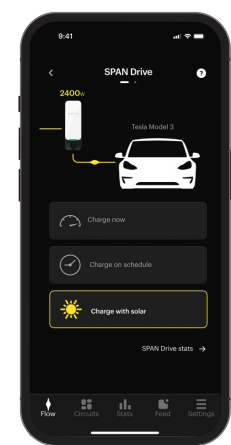
Leverage cost savings insights to see exactly how much money you are spending on each circuit to identify power hungry appliances, vampire loads to optimize your usage and save on your monthly bills.



40% more battery. 100% control.

Manage Backup section

Backup prioritization control gives homes flexibility to backup what they want, when they want, and extend battery duration by 40% during power outages.



Faster, cheaper, cleaner, EV charging

SPAN Drive Flow Section

Maximize solar, minimize your energy bill. Get the most of out of your solar system with the cheapest and greenest way to charge your EV with SPAN Drive

Promoting SPAN

Website, email, social

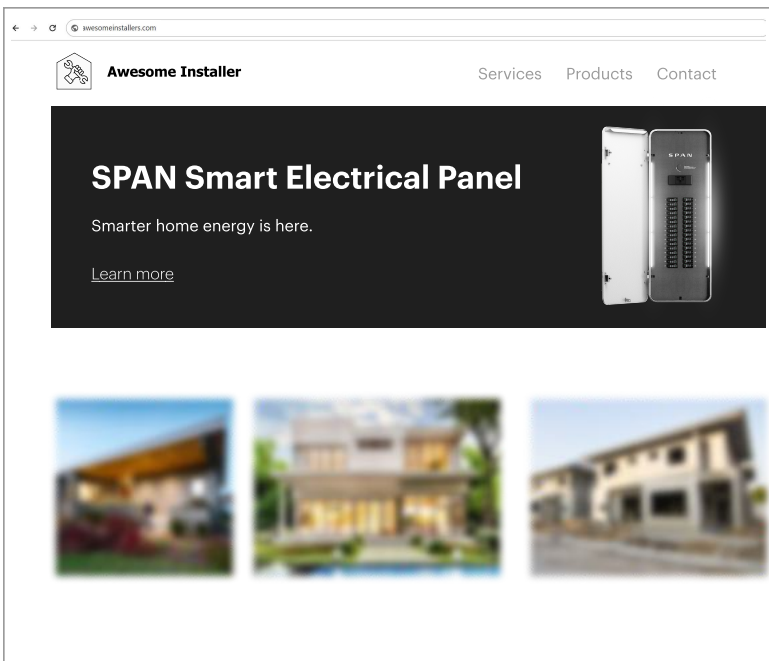
Use the images and videos in the SPAN Tech Portal available in the **Sales & Marketing section** in conjunction with the key messaging from page 4 this document to promote SPAN across digital marketing content such as email, web, and social media.

Please email your SPAN Sales Representative and include marketing@span.io on cc for review of materials and/or if you have any questions.

Website

We recommend promoting SPAN features and benefits on your homepage for increased visibility or via a dedicated landing page. Please use the messaging from page 4 of this document.

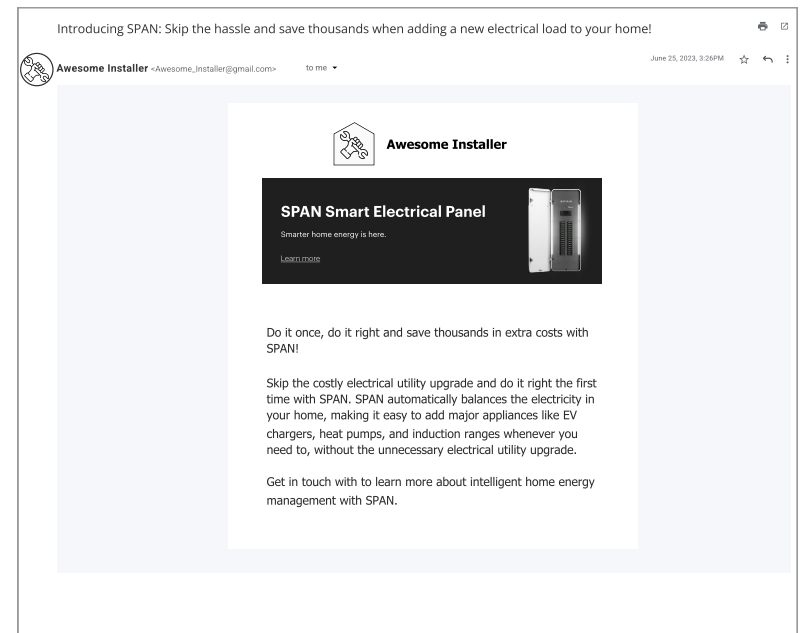
If you choose to do so, your website, landing page and/or banner should direct customers to a SPAN product page, or to your lead capture form.



Email and social media

Email and social media outreach are great channels for promoting SPAN features and benefits. Feel free to use the copy below in your emails, post and other content. Please also leverage messaging from page 3 of this document.

Be sure to include a CTA (call to action) that links either to your SPAN product page or lead capture form.



Promoting SPAN

Go-to-market next steps

- 01** Distribute, review, and use this playbook with your team
- 02** Access and download [SPAN Sales & Marketing](#) resources located in the SPAN Tech Portal and share with your team
- 03** Make sure all sales representatives have downloaded the [SPAN Home App](#) and are aware of its key selling features
- 05** Design a SPAN landing or product page for your website
- 06** Draft a SPAN announcement plan inclusive of social media posts, consumer email content, press releases, etc.
- 07** Share your marketing material with your SPAN sales representative or by emailing marketing@span.com for review, approval, and/or any questions you may have. We're here to help!

Promoting SPAN

Quarterly Marketing Activities

Please see below for marketing activation tips which you can accomplish quarterly to help drive more demand of SPAN projects to differentiate your business and earn more rebate dollars.

- 01** Send an email to your lead database highlighting information about SPAN, new product features, news and updates.

- 02** Create a social post about SPAN featuring one of your projects and happy customers; drive to your SPAN landing page or lead form.

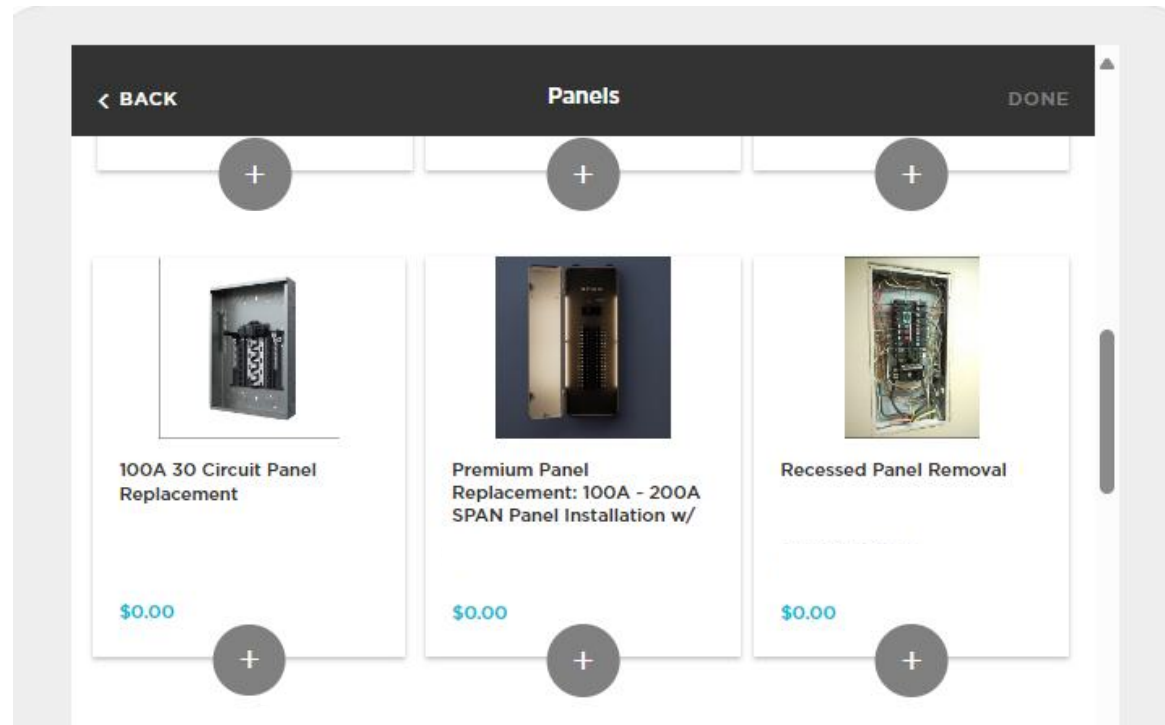
- 03** Reach out to your SPAN customers a few weeks after their installation to learn more about their experiences to generate positive testimonials on your services and expertise to use in your content.

Feel free to share your marketing material with us by emailing your SPAN sales representative and marketing@span.com for review, approval, and/or any questions you may have. We're here to help!

Adding SPAN in your Field Management tool

Including SPAN in your field management software is essential for setting your teams up for success by enabling SPAN to be seamlessly bundled with your other products. Please see below for how one of our partners has included SPAN in their tool.

Be sure to add SPAN to your own Field Management tool!



Operations, technical nuances, and application notes

Operations

- Incorporate into your field management tool
- Load SPAN as a sub-panel, MPU, service upgrade avoidance, SPAN+Drive

Onboarding

- Be sure to share the [SPAN User Manual](#) and the [Quick Start Guide](#) with your customer; this will enable them to quickly get acquainted with their new panel

Follow-up Email

- See below for helpful copy when crafting an email follow-up to your customers:

I did want to quickly follow up on the SPAN Smart Panel I showed you. Many of my customers opt for a SPAN panel, and I want you to have the information you need to decide if it is a fit for you. Below are some of the best resources to educate yourself further on SPAN:

- [The SPAN Advantage - Solar and Storage](#)
- [Short Video about SPAN](#)
- You can try out the App for yourself, it's free, no registration required and a quick and easy download: iPhone: span.io/iphone, Android: span.io/android

Plus there are many people who love to talk about their SPAN - here are a few of my favorites and if you search YouTube you'll find dozens more:

- [Jonathan Scott - Clip from Property Brothers SPAN episode!](#)
- [Better, longer home backup | SPAN Owner Story](#)
- [Kai Lenny, Big Wave Champion Surfer](#)

Technical nuances - Application tips & tricks

Design support

- [Project Planner](#) - Use our Project Planner to determine how PowerUp can save on project costs and time. The tool streamlines load calculations and surfaces documents needed for service upgrade avoidance permit approval.
- [PowerUp quick start guide](#) - Check out the PowerUp Quick Start Guide for helpful information and videos

Installer App

- [Accessing the Installer App](#) - Ensure the installer who will commission the panel has received the Installer App request and has successfully downloaded it and logged in

Other useful resources

- [Compatibility Guide](#)
- [Installation Checklist](#)
- [Project Design Support Request](#)
- [SPAN now also certified as PCS \(Blog\)](#)
- [SPAN Multi Panel applications \(Video\)](#)

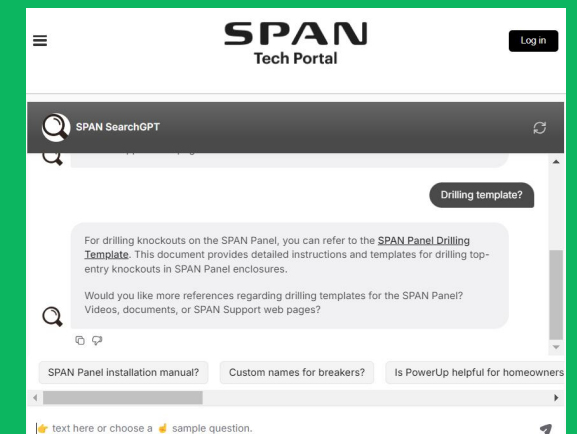
Application notes

- [Site Planning Guide](#)
- [SPAN Energy Management](#) - Using SPAN PowerUp to avoid upsizing feeder conductors
- [Avoiding Service Upgrades with SPAN](#)
- [Multi-Panel Installations](#)



SPAN Pro Tip

Can't find an answer to a question? Use the AI [SPAN Search](#) function on the SPAN Tech Portal to find your answer!



Appendix

Make sure you are ready to install SPAN on any project by accessing the quick links for SPAN Authorized Distributors, trainings, technical documentation, videos and SPAN support.

- 01** [Link to SPAN Authorized Distributor List](#)
- 02** [Link to SPAN Installer Training](#)
- 03** [Link to SPAN Sales Training](#)
- 04** [Link to SPAN Technical Documents](#)
- 05** [Link to SPAN Installation Videos](#)
- 06** [Link to SPAN Support](#)
- 07** [Link to SPAN AI SearchGPT chat bot](#)
- 08** [Link to SPAN Flyer Co-Brand Guide](#)