

STAGE 1 AUDIT WORKSHEET

2026 Audit & Scorecard: Foundational (Stage 1)

A practitioner's diagnostic for teams moving from tribal knowledge to a stable digital foundation.

6

AUDIT PILLARS

4

MATURITY STAGES

2026

EDITION

Prepared by **LumenDirectory** · lumendirectory.com

Lumen Grades are calculated via our proprietary architectural audit methodology. View standards at lumendirectory.com/methodology

DIAGNOSTIC FRAMEWORK

The 6-Pillar Scorecard

Compare current operations against the Red Flag indicators (margin leaks) and the Gold Standard benchmarks. The gap between your score and Level 4 is where your margin is hiding.

● RED FLAG — MARGIN LEAK	SCORE	➔ GOLD STANDARD — LEVEL 4
1 Design & Engineering		
Reps draw roofs manually on site. Change-order rate exceeds 15% due to shading inaccuracies. Engineering plan sets take >48 hours to return.	1 2 3 4	Remote LiDAR modeling with AI auto-stringing. Bankable shading reports instantly generated. Engineering returns permit-ready sets in <4 hours.
2 Financial Modeling		
Using static spreadsheets for ROI. Reps manually open 3 different lender portals to run soft credit checks and find the right dealer fee.	1 2 3 4	Live utility rate API integrations (NBT-3 ready). Finance partners integrated directly into the dynamic proposal. Immediate soft-pull approvals.
3 Operations		
Crew schedules managed on whiteboards or group texts. Materials ordered manually. Multiple failed inspections due to miscommunication.	1 2 3 4	Automated milestone tracking. Crews receive digital packets with geo-fenced clock-ins. Warehouse API triggers material pulls on contract sign.
4 Solar CRM		
Leads sitting in email inboxes for hours. No automated drip campaigns. Reps guessing which deals to follow up on. Sub-10% close rates.	1 2 3 4	Instant AI chat capture on website. Leads auto-routed with satellite view pre-loaded. SMS drip campaigns and predictive pipeline dashboards.
5 Asset Management		
Zero post-PTO follow-up. Only knowing a system is down when a customer leaves an angry review 6 months later. No referral requests.	1 2 3 4	Automated fleet intelligence. Work-orders automatically generated when an inverter drops. Customers receive branded mobile performance apps.
6 Enterprise Infrastructure		
Using generic enterprise tools without solar custom-engineering. Relying on 'Shadow Labor' and manual data entry to map financing and AHJ logic.	1 2 3 4	Enterprise anchor with native-fidelity API mapping. Automated bi-directional sync between sales, design, and finance data without technical debt.
Total Score: _____ / 24 6-10 Paper Era 11-16 Digital Silos 17-20 Connected Stack 21-24 Profit Engine ★		

PERFORMANCE GAP ANALYSIS

The Real Cost of Friction

Based on your specific volume of **30** installs/year. These averages reflect margin leaks identified across 500+ installers.

PROFIT LEAK	INDUSTRY AVG. LOSS	ESTIMATE	FIX STRATEGY
Manual design & change orders	≈ \$1,400 / install	\$ _____	Design Automation
Finance search overhead	≈ \$640 / install	\$ _____	Finance Integration
Ops & coordination waste	≈ \$800 / install	\$ _____	Ops Flow / PM
TOTAL ESTIMATED ANNUAL LEAK	≈ \$85,200 / year		Target Focus

ARCHITECTURAL NOTE

Friction costs are often invisible, hidden in thousands of hours of redundant double-entry and field re-visits that never show up on a standard P&L until the margin is already gone.

ROI BENCHMARKING FRAMEWORK

Where Does Your Business Sit?

Your path to a Profit Engine depends on identifying your starting point. Use this 4-stage model to pinpoint where margin is leaking in your current stack.

1**Stage 1 | Foundational** (0-5 installs/mo)

Focus: Chaos to Control. Establishing baseline hygiene and repeatable manual processes.

Manual Data Entry

Trial Risk

2**Stage 2 | Integrated** (6-15 installs/mo)

Focus: Manual to Connected. Connecting siloed design, CRM, and finance data via API.

Data Duplication

Handoff Friction

3**Stage 3 | Automated** (16-40 installs/mo)

Focus: Friction to Efficiency. Core workflows handle hand-offs and billing automatically.

Zero Double-Entry

Standardized Ops

4**Stage 4 | Intelligent (41+ installs/mo)**

Focus: Insight to Impact. Managing data as a strategic asset via predictive scaling analytics.

Maximized Margins

Industry Alpha

ACTION PLAN

The 90-Day Maturity Roadmap

Transitioning to a Stage 4 Profit Engine requires sequence. Follow this framework to de-risk your technology upgrades and maximize margin capture.

PHASE 1: ESTABLISH HYGIENE

Score your basic CRM and Design pillars. Identify why leads are falling through the cracks (likely manual entry).

PHASE 2: DIGITAL CONSISTENCY

Run a pilot with a standard CRM + Design combo. Measure speed-to-lead and initial shading accuracy.

PHASE 3: STABILIZE BASE

Document your 'Golden Truth' lead flow. Eliminate paper-based operational handoffs.

"A Stage 1 business isn't defined by more tools, but by zero double-entry. Speed is the byproduct of a connected stack."

INSTITUTIONAL GUIDANCE

Your Solution Path



STAGE 1 BLUEPRINT

Use the **Vetted Blueprint** (scanned above) to execute your transition, or access the comparison matrix to audit specific tool alternatives.

BUILD YOUR STACK (MATRIX) →

Direct Access (Filtered by Stage 1):

lumendirectory.com/compare/matrix?stage=1