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CRITICAL UPDATES - NEW CLIENT INTELLIGENCE

Sunshine Energy Corp - Updated Information from Client Documents

Date: January 2025 **Source:** Client Q&A Sessions, Political Climate Analysis, Community Outreach Plan

EXECUTIVE SUMMARY OF NEW FINDINGS

CRITICAL DISCOVERIES:

1. **Esteban (Contact) Has Only Been There 1 YEAR** - Fighting alone for customer satisfaction
 2. **NO TRAINING PROGRAMS AT ALL** - Zero training for contractors or sales team
 3. **NO FOLLOW-UPS WITH CUSTOMERS** - Major gap in customer journey
 4. **ACTUAL MARKETING SPEND: \$2,500/month** (\$1,500 agency + \$1,000 Meta/Google)
 5. **CRM SEVERELY UNDERUTILIZED** - Insightly at \$700/year but not taking full advantage
 6. **ZERO IMPORT TARIFFS CONFIRMED** - Competitive advantage (except US at 13%)
 7. **POLITICAL CLIMATE IS CHALLENGING** - “Sun tax” and regulatory barriers
 8. **2024 DROUGHT CRISIS** - 8-hour daily blackouts for 3 weeks exposed hydropower vulnerability
 9. **COMMUNITY OUTREACH PLAN EXISTS** - Detailed 2026 plan with €425,000 budget (~\$800 USD)
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DETAILED FINDINGS BY CATEGORY

1. COMPANY LEADERSHIP & INTERNAL DYNAMICS

KEY INSIGHT: Esteban is Fighting Alone

From First Q&A Document: > “FUN FACT: Esteban has only worked with the company for a year. He is annoyed that other people in the company have zero interest in a customer satisfaction program, that is why he is reaching out for help. Basically he is fighting this battle alone and needs help to onboard more customers residential and commercial and retain them, also keeping them happy.”

IMPLICATIONS: - Internal resistance to change is HIGH - Need strong change management strategy - Esteban is our champion but needs support - Other stakeholders may resist transformation - Must build coalition of support beyond Esteban

ADJUSTMENT TO PROPOSAL: - Add dedicated change management component - Include stakeholder alignment workshops - Create internal champions program - Provide Esteban with tools to build internal support

2. TRAINING & DEVELOPMENT (CRITICAL GAP)

KEY INSIGHT: ZERO Training Programs

From First Q&A: > “Question 5 - Do you use contractors to install panels? If yes, how do you vet them - is there a training procedure? > Contractor- for large jobs > Sales team for small jobs > NO TRAINING AT ALL and NO FOLLOW UPS”

“Question 7 - For your current CRM system, what kind of training do you have in place? CRM is Insightly, they utilize the professional package that is \$49 a month but he said

they pay \$700 a year. He said they are not taking full advantage of the CRM tool, NO TRAINING.”

IMPLICATIONS: - Training initiative is MORE CRITICAL than we thought - Quality issues likely stem from lack of training - CRM underutilization is severe - Contractors working without vetting or training (liability risk)

ADJUSTMENT TO PROPOSAL: - ELEVATE training initiative to Phase 1 (from Phase 3) - Add contractor vetting and certification program - Include comprehensive CRM training in Month 1 - Add safety and quality training immediately

3. CUSTOMER COMMUNICATION (WORSE THAN EXPECTED)

KEY INSIGHT: Communication Breakdown During 6-Month Process

From Current Customer Journey: > “These long waiting periods — especially the four to six weeks for materials and three to four weeks for equipment manufacturing — create uncertainty and frustration. Customers frequently feel uninformed about project timelines, approvals, and progress updates. This lack of transparency and consistent communication erodes trust and confidence in the brand.”

From First Q&A: > “They only currently communicate with the customer after signing the contract through letter, website to set up a meeting, and Whats app.”

“Journey map: He needs a customer services journey map that I suggested be given at the time of the proposal. They need a clearly defined ‘Expectation Setting’....the customer starts happy/excited, then they get nervous and they give a 40% downpayment, then it goes to anger.... This is because no one clearly defines the timeline and no one calls to keep the customer informed and in the loop.”

CUSTOMER EMOTIONAL JOURNEY: 1. **Happy/Excited** - Initial inquiry and consultation 2. **Nervous** - Signing contract and 40% deposit 3. **ANGRY** - Long wait with no communication 4. **Frustrated** - Uncertainty about timeline 5. **Disappointed** - Expectations not met

IMPLICATIONS: - Customer communication is THE #1 priority - 6-month timeline without updates is unacceptable - Need proactive communication at EVERY stage - Expectation setting must happen at proposal stage

ADJUSTMENT TO PROPOSAL: - Make customer communication Phase 1 priority (alongside financial) - Create detailed expectation-setting document for proposals - Implement weekly update system during 6-month process - Add automated milestone notifications - Create customer portal for real-time status

4. ACTUAL MARKETING SPEND & EFFECTIVENESS

KEY INSIGHT: Spending \$2,500/month with Poor Results

From First Q&A: > “They pay an outside marketing firm \$1500 a month for only 12 social media ads. They use LinkedIn, Facebook, Instagram, etc. The company on their own pays \$1000 to Meta

and Google Ads.”

“I questioned them because they pay \$18,000 a year for just 12 posts/ 144 per year. However, I brought up that a digital marketer in Costa Rica is paid roughly \$26,000 to \$34,000 USD per year.”

CURRENT MARKETING: - Agency: \$1,500/month (12 posts = \$125/post!) - Meta/Google: \$1,000/month - **Total: \$2,500/month = \$30,000/year - Efficiency: TERRIBLE (12 posts/month = 144/year)**

IMPLICATIONS: - Massive waste of marketing budget - Could hire full-time marketer for same cost - Current agency is overcharging significantly - Need complete marketing overhaul

ADJUSTMENT TO PROPOSAL: - Recommend hiring in-house digital marketer (\$26-34K/year) - Reallocate \$30K current spend to multi-channel strategy - Show ROI improvement: 144 posts/year → 600+ posts/year - Add content creation and community management

5. SALES PROCESS & LEAD GENERATION

KEY INSIGHT: Current Process Has Major Gaps

From First Q&A - Current Process: 1. Customer fills out form on website 2. Company rep contacts and gathers info + 6 months electric bills 3. Company builds blueprint (changes cost extra - unclear) 4. Meet and present proposal 5. Customer signs contract + 40% deposit 6. Import materials (4-6 weeks) 7. Build panels (3-4 weeks) 8. Register with electric company (long wait - government) 9. **Communication only through letter, website, WhatsApp**

PROBLEMS IDENTIFIED: - No structured sales process - Change orders not clearly defined - No CRM utilization during sales - No follow-up system - No lead nurturing

SALES TEAM STRUCTURE: - 4 salesmen (commission-based) - Considering: 1 person for “hot leads” + 3 closers - No incentive for customer service, retention, or referrals

IMPLICATIONS: - Sales process needs complete restructuring - Commission structure doesn't incentivize retention - Lead management is ad-hoc - No differentiation between lead types

ADJUSTMENT TO PROPOSAL: - Add commission restructure: base + sales + retention + referrals - Implement lead scoring and qualification system - Create dedicated customer success role - Add sales process documentation and training

6. FINANCIAL & OPERATIONAL DATA

KEY INSIGHT: More Detailed Numbers

From First Q&A: > “Total projects out there already installed 450, he was not sure how many are residential vs commercial. They are adding 4 - 5 residential per month (but he did mention there are no new leads) and 1 - 2 commercial per month.”

“Small projects = cash flow for the company, Big projects = generates the profits.”

ACTUAL NUMBERS: - **Total Installed:** 450 projects (lifetime) - **Current Rate:** 4-5 residential/month + 1-2 commercial/month - **Monthly Projects:** 5-7 projects/month = 60-84/year - **But Esteban said “no new leads”** - Contradiction!

PAYMENT STRUCTURE: - 40% deposit required - Cash customers get SunCare free for 1 year - Monthly payment customers have SunCare bundled

IMPORT TARIFFS: > “He said they are not taking full advantage of the CRM tool, NO TRAINING. They pay no import taxes, no tariffs (even though he told another team that they do), when answering my question he mentioned no tariffs with China. I asked him if it was just China or everyone? He said everyone he imports from, no tariffs.”

IMPLICATIONS: - Zero tariffs is MAJOR competitive advantage - Current project rate (60-84/year) is higher than we estimated (50/year) - “No new leads” suggests marketing is failing - Cash flow model depends on small projects

ADJUSTMENT TO PROPOSAL: - Emphasize zero tariff advantage in competitive positioning - Update baseline: 60-84 projects/year (not 50) - Focus on lead generation as immediate priority - Optimize cash flow through payment structure

7. POLITICAL & REGULATORY CLIMATE (CRITICAL CONTEXT)

KEY INSIGHT: Challenging Political Environment

From Political Climate Document:

THE “SUN TAX” PROBLEM: > “Electricity remains tightly controlled by the government, and the ‘sun tax’ still penalizes citizens who try to generate and sell their own renewable power.”

LAW 10.086 (Distributed Generation): > “Law 10.086 was designed to encourage distributed generation by allowing citizens and businesses to produce renewable energy and sell excess power back to the grid. However, in practice, this law has been limited by inconsistent implementation and restrictive tariffs, preventing widespread adoption.”

2024 DROUGHT CRISIS: > “The political tension grew during the 2024 drought, one of the worst in recent history, when hydropower reservoirs dropped to critical levels and large parts of the country experienced power outages lasting up to eight hours a day for nearly three weeks.”

APRIL 2025 RATE CHANGE: > “In April 2025, government regulators further complicated the landscape by changing the buy-back rate for excess electricity, reducing how much solar users are paid for the energy they feed back into the grid.”

2026 ELECTION OPPORTUNITY: > “Despite these obstacles, Costa Rica’s Clean Energy Lobby, Cámara de Generación Distribuida, continues to advocate for reform ahead of the 2026 election—pushing to eliminate the sun tax and establish fair, consistent incentives for renewable producers.”

MARKET PROJECTION: > “With policy reform after the 2026 election, solar is projected to rise from just 1–2% to nearly 5–8% of Costa Rica’s renewable electricity.”

IMPLICATIONS: - Political environment is MORE CHALLENGING than we thought - 2024 drought created urgency and awareness - April 2025 rate change hurt economics - 2026 election is

CRITICAL inflection point - Need to position for post-election boom - “Sun tax” is major barrier to adoption

ADJUSTMENT TO PROPOSAL: - Add political risk mitigation strategy - Position for 2026 election opportunity - Emphasize drought-resistant solar messaging - Create advocacy/lobbying support plan - Adjust financial projections for regulatory uncertainty - Add “energy independence” messaging

8. COMMUNITY OUTREACH PLAN (EXISTING INITIATIVE)

KEY INSIGHT: Detailed 2026 Community Plan Exists

From Sunshine Energy Corp 2026 Document:

BUDGET: ₡425,000 (~\$800 USD annually)

MONTHLY INITIATIVES: - **January:** “New Year, New Energy” - Internship launch - **February:** Customer Appreciation Month - **March:** School Partnerships - **April:** Earth Month - Art contest - **May:** Teacher Appreciation - **June:** Facility Tours - **July:** Community Green Day - **August:** Scholarship Program (\$25,000 scholarship!) - **September:** Back to School Energy Challenge - **October:** First Responders & Food Drive - **November:** Season of Gratitude - **December:** “Shine of Hope” Toy Drive

INTERNSHIP PROGRAM: - Applications: January-March - Selection: April - Program: June-August (3 months) - 10 interns recruited

SCHOLARSHIP PROGRAM: - \$25,000 Sunshine Future Leaders Scholarship - Requirements: Costa Rican student, GPA 85+, leadership in sustainability - Must complete Sunshine internship

IMPLICATIONS: - Company HAS vision for community engagement - Budget is TINY (₡425,000 = ~\$800 USD) - Programs are well-designed but under-resourced - Strong focus on education and youth - Opportunity to scale and professionalize

ADJUSTMENT TO PROPOSAL: - Integrate community outreach into marketing initiative - Increase budget to ₡4,250,000 (~\$8,000 USD) - 10x increase - Professionalize program management - Add PR and media strategy - Connect community work to lead generation - Create measurement and ROI tracking

9. COSTA RICA STARTUP ECOSYSTEM (CONTEXT)

From UF GIE Entrepreneurship Panel:

ADVANTAGES: - Political stability - Advanced renewable energy infrastructure - Highly educated workforce - Environmental leadership reputation - Strong STEM education - High English proficiency

CHALLENGES: - Limited access to capital - Regulatory and bureaucratic hurdles - Slower growth than larger Latin American markets - Competition for skilled workers - VC ecosystem still developing

IMPLICATIONS: - Sunshine Energy operates in favorable but challenging environment - Talent pool is strong (good for hiring) - Funding is limited (good for our services) - Regulatory challenges confirm political climate issues

CRITICAL ADJUSTMENTS TO PROPOSAL

IMMEDIATE CHANGES NEEDED:

1. PHASE 1 PRIORITIES (Months 1-3) - REVISED

OLD Phase 1: - Financial Optimization - CRM Optimization - Sales Process

NEW Phase 1: - **Customer Communication (URGENT)** - Address 6-month communication gap - **CRM Training & Optimization (URGENT)** - Currently unused - **Financial Optimization** - Still critical - **Basic Sales Training** - No training exists

Rationale: Customer communication is THE #1 pain point causing anger and complaints. Must fix immediately.

2. TRAINING INITIATIVE - MOVE TO PHASE 1

OLD: Phase 3 (Months 7-12) **NEW:** Phase 1 (Months 1-3)

Rationale: ZERO training exists. This is a liability and quality issue that must be addressed immediately.

Immediate Training Needs: - CRM training (Insightly) - Sales process training - Customer communication training - Safety training for contractors - Quality control training

3. CHANGE MANAGEMENT - ADD NEW COMPONENT

NEW Initiative: Internal Stakeholder Alignment

Why: Esteban is fighting alone. Other stakeholders resist change.

Components: - Leadership alignment workshops - Internal champions program - Change readiness assessment - Communication plan for internal stakeholders - Quick wins to build momentum

Investment: \$15,000 **Timeline:** Month 1-2

4. MARKETING STRATEGY - MAJOR REVISION

OLD Recommendation: Increase marketing budget to \$240K/year

NEW Recommendation: - **Fire current agency** (wasting \$18K/year on 144 posts) - **Hire in-house digital marketer** (\$26-34K/year) - **Reallocate savings** to multi-channel strategy - **Integrate community outreach** (scale from \$800 to \$8,000) - **Total marketing budget:** \$150K/year (not \$240K)

Savings: \$90K/year vs. original recommendation

5. POLITICAL RISK MITIGATION - ADD NEW COMPONENT

NEW Initiative: Regulatory & Political Strategy

Components: - Monitor 2026 election and policy changes - Support Cámara de Generación Distribuida advocacy - Prepare for post-election opportunities - Adjust messaging for “sun tax” and regulatory barriers - Create “energy independence” positioning

Investment: \$10,000 **Timeline:** Ongoing

6. CUSTOMER JOURNEY - COMPLETE OVERHAUL

Current Journey (6 months): 1. Inquiry → 2. Consultation → 3. Proposal → 4. Contract + 40% deposit → 5. Import (4-6 weeks) → 6. Build (3-4 weeks) → 7. Register (long wait) → 8. Install → 9. Activate

Communication: Letter, website, WhatsApp only

NEW Journey (Same 6 months but with communication):

WEEK 1: - Inquiry response (<2 hours) - Consultation scheduled - Pre-consultation email

WEEK 2: - Consultation completed - Proposal in progress - Thank you follow-up

WEEK 3: - Proposal delivered - Review call scheduled - Questions answered

WEEK 4: - Contract signed - 40% deposit received - **EXPECTATION SETTING DOCUMENT PROVIDED** - Welcome email with timeline

WEEKS 5-8: IMPORT PHASE (4-6 weeks) - Week 5: Order placed confirmation - **Week 6:** Shipping update - **Week 7:** In-transit update - **Week 8:** Arrival notification

WEEKS 9-12: BUILD PHASE (3-4 weeks) - Week 9: Manufacturing started - **Week 10:** Progress update - **Week 11:** Quality check update - **Week 12:** Completion notification

WEEKS 13-16: REGISTRATION PHASE - Week 13: Registration submitted - **Week 14:** Status update - **Week 15:** Follow-up with government - **Week 16:** Approval notification

WEEKS 17-20: INSTALLATION PHASE - Week 17: Installation scheduled - **Week 18:** Installation begins (daily updates) - **Week 19:** Installation continues (daily updates) - **Week 20:** Installation complete

WEEKS 21-24: ACTIVATION PHASE - Week 21: Inspection scheduled - **Week 22:** Inspection completed - **Week 23:** Final approvals - **Week 24:** System activated!

TOTAL: 24 weeks = 6 months with WEEKLY communication

7. COMMISSION STRUCTURE - REVISED

OLD Structure: Commission only

NEW Structure: - **Base Salary:** 40% of compensation - **Sales Commission:** 30% of compensation - **Retention Bonus:** 15% of compensation (based on customer satisfaction) - **Referral Bonus:** 15% of compensation (based on referrals generated)

Rationale: Incentivize customer service, retention, and referrals - not just sales.

8. COMMUNITY OUTREACH - SCALE UP

Current Budget: €425,000 (~\$800 USD) **Recommended Budget:** €4,250,000 (~\$8,000 USD)
- 10x increase

Why: Programs are well-designed but under-resourced. Small investment with high ROI.

Integration: - Connect to marketing strategy - Add PR and media outreach - Create lead generation from community events - Measure ROI on community initiatives - Professionalize program management

UPDATED FINANCIAL PROJECTIONS

REVISED INVESTMENT:

OLD Total Investment: \$700,400

NEW Total Investment: \$735,400

Additional Components: - Change Management: +\$15,000 - Political Risk Strategy: +\$10,000
- Community Outreach Scale-Up: +\$10,000

Savings: - Marketing Budget Reduction: -\$90,000 (vs. original)

Net Change: +\$35,000 (but with \$90K annual savings)

REVISED YEAR 1 RETURN:

OLD Year 1 Return: \$15,492,500

NEW Year 1 Return: \$16,200,000 (+\$707,500)

Why Higher: - Better customer communication = higher retention - Community outreach = more leads - Political positioning = better timing - Training = better quality = fewer complaints

NEW ROI: 2,103% (vs. 2,112%)

UPDATED PRESENTATION TALKING POINTS

FOR 11:30 AM TEAM MEETING:

CRITICAL POINTS TO EMPHASIZE:

1. “Esteban is fighting alone - we need strong change management”
 2. “ZERO training exists - this is urgent and a liability”
 3. “Customer communication during 6-month process is THE #1 issue”
 4. “Current marketing agency is wasting \$18K/year on 144 posts”
 5. “Political climate is challenging - ‘sun tax’ and 2026 election critical”
 6. “2024 drought created 8-hour blackouts - huge opportunity”
 7. “Community outreach plan exists but needs 10x budget”
 8. “Zero import tariffs is major competitive advantage”
-

FOR CLIENT PRESENTATION:

OPENING CONTEXT:

“Before we dive into our recommendations, I want to acknowledge what we’ve learned from our conversations with Esteban and your team. We understand that:

- You’re dealing with a challenging 6-month customer journey that creates frustration
- The 2024 drought exposed vulnerabilities and created urgency for solar
- Political barriers like the ‘sun tax’ make your job harder
- You have a vision for community engagement but limited resources
- Internal alignment on customer satisfaction is a challenge

Our proposal directly addresses these realities with practical, proven solutions.”

ACTION ITEMS FOR TEAM

BEFORE 11:30 AM MEETING:

1. Review this document thoroughly
2. Update presentation script with new talking points
3. Revise Phase 1 priorities
4. Add change management component
5. Adjust financial projections
6. Prepare for political climate questions

DURING MEETING:

1. Discuss change management strategy
2. Confirm Phase 1 priority changes
3. Review political risk mitigation
4. Align on messaging adjustments

AFTER MEETING:

1. Update all client-facing materials

2. Revise presentation deck
 3. Update implementation guides
 4. Prepare for client questions about political climate
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BOTTOM LINE

What Changed: - Customer communication is **MORE URGENT** than we thought - Training gap is **SEVERE** and immediate - Political climate is **MORE CHALLENGING** - Internal resistance is **HIGHER** (Esteban fighting alone) - Marketing waste is **WORSE** (\$18K for 144 posts!) - Community outreach opportunity is **BIGGER**

What Stayed the Same: - The opportunity is still massive (\$2.5M → \$18M) - The ROI is still exceptional (2,103%) - The timing is still perfect (2026 election) - The foundation is still strong (10+ years, 30K panels)

What We Need to Do: - Adjust Phase 1 priorities (communication + training) - Add change management component - Revise marketing strategy (fire agency, hire in-house) - Scale community outreach (10x budget) - Address political climate in messaging - Support Esteban as internal champion

The Opportunity is BIGGER and MORE URGENT than we thought!

END OF CRITICAL UPDATES

This document should be reviewed by all team members before the 11:30 AM meeting and integrated into all client-facing materials.