SOUTHWESTSOLUTIONSGROUP

EV Charging Playbook

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9 STEPS ON THE ROAD TO THE EV REVOLUTION

From infrastructure planning to installation, your commitment to EV charging should be effortless no matter if it's for commercial, fleet, or residential environments. For a turnkey installation, selecting partners with the right experience and understanding of EV charging is one of the most important parts of getting started. The road to joining the EV revolution has nine main steps to start connecting your customers to your vision for a more sustainable future.

STEP 1
SELECT AN ELECTRICAL CONTRACTOR

Regardless of your final installation type, you will need an experienced electrical contractor to get started. Each charger and location comes with a host of variables, so it's important to make sure you have a professional that you trust to complete the project.If you don't already have an electrical contractor in mind, there are a few things you'll want to consider as you identify a partner for your project.

Your electrical contractor should:

- Hold the EV Infrastructure Training Program certification and an up-to-date electrical license - These two certifications assure they know how to not just electrify a machine, but also familiar with the specifics of EV charger installations.
- Have **at least a two-person team with experience installing EV chargers** - EV chargers can be large, heavy, and difficult to manage with a single person.

STEP 2
EXPLORE THE COST OF EV CHARGER INSTALLATION WITH YOUR CUSTOMER

Exciting news! One of your customers is interested in deploying EV chargers. When the opportunity arises, you'll need to coordinate a site survey with the site host and your electrical contractor partner. You can prepare for the site survey by gathering as much information as possible beforehand, including:

- **Establish EV charging project goals** - Identify the goals your customer has for their EV charging project, such as sustainability, profit opportunities, or a new amenity for employees.
- **Determine EV charger application and budget** - Once you know your customer's goals and knowledge level of EV options, it's time to determine the charger application most suitable for them (Level 2 or DC fast charging, networked or non-networked), and establish their budget for the project.

STEP 3
CONDUCT YOUR SITE SURVEY WITH THE ELECTRICAL CONTRACTOR

After exploring options and establishing your budget with your customer, you can move forward with a site survey for the planned EV station locations. We have developed a Site Survey Checklist that will help you and your electric contractor ensure that all necessary information is captured and minimize revisits.

The Checklist includes items such as:

- Proposed EVSE type
- Electric panel capacity, space availability, and required upgrades
- Site profile and necessary construction work, signage, and network signal upgrades

Include as much detailed information as possible before sending your completed checklist to your electrical contractor.. Make sure your electrical contractor takes ample photos of the location, including pictures of the existing electrical panel, where the wire/conduit will run, and where the charger(s) will be mounted.

STEP 4
DESIGN THE SITE

Next, you will take the information gathered by the electrical contractor and utilize it to create a site design for the EV charging location. The goal is to develop a plan that best meets the goal of your customer. Every site is different, and this is the time to review all of the necessary considerations. When it comes to site design, cost effectiveness, accessibility, and the surrounding environment of the site are the key factors to consider:

- **Cost Effectiveness -** Cost will vary depending on the on-site power capacity, materials, and any necessary construction work, which may require additional contractors.Accessibility - Ensure customers comply with ADA requirements for EV charging stalls, include wayfinding signage, and identify the best design to serve their users.
- **Site Environment -** The site must allow water to flow and prevent pooling and ideally, leave room for easy future expansion.

STEP 5
PRICE AND PRESENT THE PROJECT

You're about midway through the process of completing a sale for EV charging solutions, but there are still a few more key steps. Now is the time for pricing. As you consider the total project cost, include installation, hardware, utility work, site work, permitting, signage, and ongoing maintenance and support, such as EVantage that offers hardware, network connectivity, technical, and ongoing support, as well as out-of-territory support and planning.

From there, you present the fully-planned project to your customer. This proposal should include the total turnkey price, project inclusions and exclusions, and the projected timeline for completion of the project. When determining the total price, don't forget to also identify any potential grants or rebates if your prospect qualifies for such incentives.

STEP 6
CONFIRM CONTRACT IS SIGNED BY THE CUSTOMER

After calculating the total cost, the next step is to send a contract for your customer to review and sign. It's important to ensure that the contract includes all project deliverables and a clearly-defined timeline.

As is the case with any contract, distinguishing how and when the project will be paid is a key component of this step. Potential payment methods could include financing options, up-front payment, phased payments, or another payment plan agreed upon by you and your customer.

STEP 7
PLAN AND SCHEDULE THE PROJECT

Once you receive a signed contract, the finish line is in your sight, but that doesn't mean the job is done. Now, it's time to plan and schedule installation of the project. Your electrical contractor will pull any required permits for your project, which in most cases will only include an electrical permit. However, you will need to coordinate with any utilities to confirm that they know of the upcoming project.

If additional construction work is needed, you will also need to coordinate with those contractors to define the scope and standards for the project, execute an agreement, and schedule the work for completing the project.

STEP 8
COMPLETE INSTALLATION

The moment you've been waiting for is finally here–it's time to complete the installation of EV charging stations for your customer. During this step, your electrical contractor will finalize the installation before handing over ongoing management to you. Final installation includes:

- All of the necessary infrastructure is in place
- EV charging stations are in the ground and tested to confirm everything is running smoothly.
- Verification that the installation has been completed and meets all expectations.

After verification, you or your electrical contractor can coordinate with our Energy Services team to commission the charging stations.

STEP 9
CLOSE OUT PROJECT

Congratulations are in order! Your customer's EV charging stations have been installed and commissioned, and are now ready to be used by drivers in and around their community. It's also important to note that continuing to build upon the customer relationship could lead to expanding projects, upgrade opportunities, and solid references for future endeavors.

Following the completion of your project, consider offering additional perks to your customer, such as hardware and software training, recurring check-ups, or special discounts on future projects. Soon, you'll be a pro at helping countless other customers join the EV revolution with the next generation of infrastructure.