From a voice note in the van to a solar proposal

By Ben Brockbank-Naylor | 26 October 2026 | Voice-led surveying

The most useful information from a survey is often the detail that never fits neatly into a form. Why does the customer want a battery? Which wall did you agree for the inverter? What made you prefer one cable route over another? A good proposal should carry that understanding forward.

Keep the site visit focused on the customer

A surveyor needs enough preparation to understand the job, but should not spend the whole visit operating an app. The address, the customer's requirements and any initial roof information belong in a short briefing. On site, the job is to look properly at the building, ask questions and explain the practical options.

A conversational workflow is useful because the surveyor already knows what they want to say. Once safely parked after the visit, they can describe the job in their own words while the route through the building and the conversation with the customer are still fresh. That is the starting point, rather than a requirement to dictate a perfect specification.

Separate the request from the recommendation

The customer may ask for backup power and a battery in the garage. The surveyor may recommend a different position because of access, cable routing or the space available. Both pieces of information matter. A handover that records only the final kit list can lose the reason for the design and leave the next person guessing.

A useful debrief therefore covers what the customer wants, what the surveyor recommends and what still needs checking. The proposal can then explain the recommendation in the context of the customer's priorities. It should not turn an initial preference into an agreed design decision without review.

Make confidence visible

A measured nine-metre dimension is different from saying that a roof looks about nine metres long. An estimated pitch is different from a confirmed reading. The system needs to retain those distinctions, alongside the source of each fact, rather than quietly making every number appear equally reliable.

The same applies to photographs and roof imagery. Photos can help organise a project and show equipment locations, but they do not automatically establish accurate distances, safe clearances or a complete electrical design. Missing information should become a visible check, not a confident sentence in the customer email.

Turn one debrief into a reviewable project

The intended Solful workflow uses the debrief to prepare a proposed design, a quote based on the installer's approved catalogue and a draft customer email. Kit positions, cable notes, photos and open questions stay with the project. The useful output is something another person can understand and check, not simply a long transcription.

A straightforward job may be ready for the surveyor to review and approve. A more involved one can go to the office with the same context attached. The office should be able to see what has been confirmed, what has been assumed and what decision it is being asked to make. Customer sending remains part of the company's approval process.

Speed comes from removing repeated work

A prompt proposal is useful when it accurately reflects the visit. Sending something quickly and then repeatedly correcting it is a different experience. A practical team target might be to review straightforward jobs within 24 hours, while communicating a realistic next step for jobs that need a designer or more information. That is a process target, not a guarantee of higher conversion.

The time saving should come from capturing the information once, preparing the next documents from that information and making the handover clear. It should not depend on removing the person who understands the customer, or on letting an automated email make technical promises that nobody has checked.

Test the workflow against real survey days

Start with a small set of real jobs and compare the voice debrief, the approved design and the email that was eventually sent. Ask which facts were missed, which estimates were mistaken for measurements and where the office still had to make a phone call. Count the correction time as part of the job, alongside the minutes saved on typing.

I am building Solful to make the surveyor's knowledge easier to use while the team is out doing its work. The goal is a more direct customer relationship, a clearer quote and less back office admin. A useful pilot should demonstrate those things in the team's own working day before anyone builds a sales forecast around them.

Ben Brockbank-Naylor is the founder of Solful and has over 10 years of experience in renewable energy. Solful is being built around voice-led surveying, proposal preparation and office review.

Read this article online | Book a meeting