



Irwin Success Story: Sunrun

How the Solar Service Company Scales its IR
Function and Maximizes Productivity Using Irwin





Fifteen years ago, Sunrun pioneered the “solar-as-a-service” model. Since then, they’ve been delivering on a vision to provide Americans with affordable, reliable, clean energy. Sunrun provides home solar and rechargeable battery storage services from coast to coast in 22 states, plus Puerto Rico and the District of Columbia.

They proudly serve over 800,000 customers across the United States and are growing rapidly. Sunrun has generated more than 11 billion kilowatt hours of clean energy since 2007, preventing 8.1 million tons of CO2 from entering the atmosphere. This is the equivalent of avoiding carbon dioxide emissions from more than 8.9 billion pounds of coal or 908 million gallons of gasoline.

Quick Facts

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|-----------------------|----------------------|
| Market Cap: | \$3.81B |
| Sector: | <i>Technology</i> |
| Industry: | <i>Solar</i> |
| Full Time Employees: | <i>>15,000</i> |
| Location: | <i>United States</i> |
| Irwin Customer Since: | <i>2021</i> |

Sunrun is paving the way for the future. The company is enabling a customer-led revolution to modernize our energy system with affordable, reliable, and clean solutions such as home solar and rechargeable battery storage.

As a company that focuses on creating energy systems that reduce the need for expensive infrastructure, Sunrun understands the importance of efficiency. However, when the company first IPO'd in August 2015, they were offered a legacy IR management system that, unfortunately, failed to live up to the company's standards. With PDF file extraction taking upwards of six hours, unresolved support requests, and an outdated database, something needed to change.

Meet Sunrun's Senior Vice President, Finance & Investor Relations



Patrick Jobin is a Senior Vice President at Sunrun, the nation's largest home solar, battery storage and energy services company. Jobin oversees Sunrun's investor relations function, serving at the liaison with the financial community.

Jobin relishes in communicating complex disruptive growth stories and forging strong, enduring relationships with investors. Prior to joining Sunrun in December 2016, Jobin served as a Director and senior equity research analyst with Credit Suisse, one of the largest global investment banks, leading the clean technology energy research group in New York.

Jobin was recognized as a top analyst by the investment community, and received all top-three rankings in the Institutional Investor All-America Research poll over the last three consecutive years prior to joining Sunrun. Jobin began his career at Credit Suisse in 2006 and assumed primary coverage of the clean technology sector in 2011. During his tenure, he covered more than thirty companies and was involved in helping raise more than \$3 billion in equity capital during IPO processes and secondary offerings across the sector. In his role leading investor relations at Sunrun, Jobin has also been ranked the top investor relations professional in the alternative energy sector by both the buy-side and sell-side every year since he assumed the role.

Jobin is based in Denver. Jobin holds a bachelor's degree in finance from New York University's Stern School of Business where he graduated summa cum laude.

Challenge: Navigating Disruption in a Volatile Sector

IR is a critical function for Sunrun to engage with the capital markets and investors to explain the company's complex business story and help navigate a multi-trillion dollar industry disruption. Patrick Jobin—Senior Vice President of Finance & Investor Relations at Sunrun—knew that having the right tool to help engage with investors was critical on the journey, and he needed an innovative IR platform to help him.

Jobin joined Sunrun to lead the IR function in 2016 after spending nearly a decade as a senior research analyst and head of renewable energy equity research. His task was simple: revamp Sunrun's IR function to increase engagement with the right investors and analysts. Sunrun's equity story is extremely complex and was "*grossly misunderstood by the market at that time,*" according to Jobin.



“Investors depend on knowledgeable and accessible investor relations as part of their investment process. It is critical for us to effectively explain our position, how we're capitalizing on opportunities and adapting to any external factors thrown at us,” explains Jobin.

“Without a productive and effective IR function that leverages the best technology platforms, I believe our stock would be more volatile as the company would be less understood in the market.”

That's where Irwin comes in.

Solution: A Responsive IR CRM that Grows With Sunrun

With Irwin's IR CRM and engagement tools, Jobin and his team are more productive and efficient. The Sunrun team can now easily track investor and sell-side interactions, manage a multitude of lists using tags, optimize targeting and outreach efforts, auto-log events from internal calendars, and deliver high-value email outreach—all while getting time back thanks to built-in automation.

Here are three reasons why Jobin and Sunrun love using Irwin:

1. Ability to maintain and grow investor relationships.

For Jobin and Sunrun, *“engaging with investors is critical.”* That's why having technology that would enable efficient engagement with investors was a key factor for Jobin when he was choosing his next IR software partner.

“The number one issue is how precious time is—anything that takes tons of time to do but isn't a high-value activity is a non-starter and must be shed. And Irwin is critical to optimize time—helping identify what investors we engage with and how we track it.”

Sunrun operates a complex business model. To help tell the company's story, Jobin relies on Irwin's CRM to seamlessly manage the company's contacts. By having historical context and activity tied to investor profiles (such as meeting history and outcomes, email interactions, phone calls, and more), Jobin can build strategic relationships with audiences best fit for Sunrun.

2. Refined features and an easy-to-use interface.

With Irwin's CRM and integrations, Jobin can easily keep track of all Sunrun's investor interactions—including events, meetings, emails, phone calls, and more. He saves valuable time using Irwin's nuanced features, such as:

- **An email integration** that provides fully-comprehensive communication records and includes a BCC feature that automatically syncs with Irwin. Sunrun's team uses this feature to streamline pre- and post-meeting investor touchpoints and easily manage investor roadshow communications—a capability he didn't have with previous platforms.
- **Irwin Assistant** uploads and organizes Sunrun's data and 'tags' all investor activities and contacts, making it easy for the Sunrun team to prepare for future interactions and understand outreach efforts, current holders, and prospective investor landscapes.
- **A calendar integration** that seamlessly pulls events from internal calendars into the Irwin platform to manage all meetings in one place

"What drove me to Irwin was the clean interface," explains Jobin.

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"I can quickly accomplish tasks without getting bogged down in a cumbersome legacy interface. The whole point of the IRM is to efficiently track engagement to optimize how you interface with investors and report on it for efficacy purposes, and the nuanced features in Irwin are incredibly valuable time savers."

3. Continuously evolving product developed with an entrepreneurial-like mindset.

When Jobin began his search for a new IR software, his top criteria were to find a platform that gave him back time, made him more efficient, and a team that would consider his product feedback while providing support as necessary. When he began the sales process with Irwin, he was impressed to find a productivity-based platform.

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“The best part of Irwin is how committed they are to listening to feedback, their continued investments in the platform and tools, and their amazing client service,” explains Jobin. “Based on their company vision and differentiated offering, I look forward to what’s to come.”

Looking for more investor relations resources?

Access more case studies, articles, videos, guides, and podcasts outlining the latest trends and best practices in investor relations and capital markets on the Irwin blog — including how to connect with investors, what technology you need to succeed in IR, and how to best communicate with your shareholders.

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Results: A Better Way to Manage Investor Relations

Jobin chose Irwin as Sunrun's investor relations software partner in June 2021. Over that period, Irwin's investor relations software and services have allowed Sunrun to scale its IR efforts, helping Jobin and the business to achieve the following results:

Increased time savings and productivity through automated workflows.

With Irwin, Sunrun's IR team no longer has to spend several hours a week ensuring their investor database is updated for engagement activities or pulling customized investor lists. Irwin Assistant helps to maintain and organize Sunrun's IRM data by tagging all investor activities and contacts, so the team can save time and devote more resources to tasks of higher importance.

Efficiently track engagements and optimize interactions with investors.

With Irwin's built-in activity management and robust reporting tools, the Sunrun IR team can now effectively track and manage investor meetings, emails, phone calls, events, and more. Plus, by using Irwin's email interface and templates, the team can now easily send pre- and post-meeting notes with the right information and stay in front of the right investors—all while saving valuable time.

The ability to scale efficiently with maximum productivity.

Irwin provides Jobin and Sunrun with the capability to increase the efficacy of the company's IR function without needing to add additional headcount. By reducing the number of administrative tasks the team has to complete, Irwin's technology puts time back into the team's day, so they can increase productivity and continue to be an efficient IR team, driving efficiency and volume typically seen with IR teams that are two or three times larger.

Why Sunrun Loves Irwin:



“It’s always worth evaluating and determining if something can make your job more productive and efficient. I know there can be a high-friction cost when switching platforms and tools. But it was well worth it, and Irwin made the process seamless to integrate all the data from prior platforms into their own.”

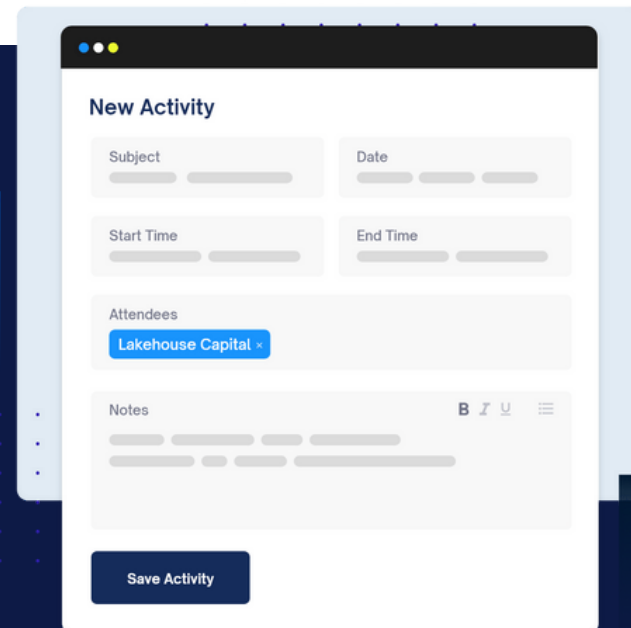
Patrick Jobin

Senior Vice President of Finance & Investor Relations

Irwin: The Most User Friendly Investor Relations CRM

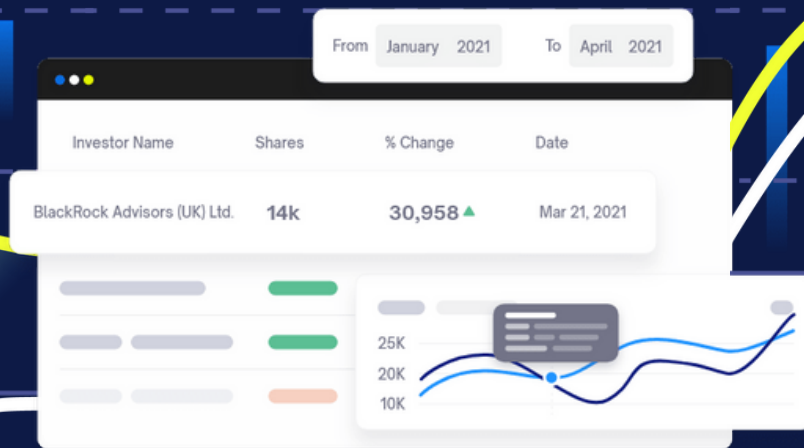
Irwin's CRM and Engagement tools enable context and business continuity for IR teams by tracking all of your investor interactions, providing in-depth reporting capabilities, and providing tools to seamlessly manage investor events and conferences.

[Learn More](#)





A **better** way to manage investor relations.



Irwin is built on the belief that investor relations is a critical strategic component of a company's success. Companies deserve a platform that unlocks critical strategic insight, automates manual and time-consuming tasks, and consistently innovates alongside the ever-evolving role of the IR team.

[Request a Demo](#)

Irwin's Versatile Suite of IR Solutions:

- **Shareholder Monitoring**
- **Investor Targeting**
- **CRM & Engagement Tools**
- **IR Website Intelligence**
- **Research, Estimates & Transcripts**
- **Capital Markets Strategy Services**