

## 60. Solar Surge

In the bustling summer of 2021, amidst a flurry of projects, Elon Musk turned his focus towards revolutionizing the solar roof industry. Having been a key player in the launch of SolarCity in 2006 and later orchestrating its acquisition by Tesla for \$2.6 billion, Musk found himself in a legal tangle with Tesla shareholders, pushing him to take drastic measures to prove the buyout's worth. His strategy: oust his cousins, Peter and Lyndon Rive, from the company for their sales-centric approach and venture into a mission of hypergrowth in solar roof installations.

Musk's relentless quest for innovation led to high turnover among Tesla Energy leaders, who were challenged with near-impossible growth targets and faced dismissal upon failure. RJ Johnson, with his military precision, and Brian Dow, with his unyielding enthusiasm, were among those who took up Musk's gauntlet, each bringing a distinct approach to meet Musk's demanding expectations.

The narrative shifts to August 2021, where Musk's hands-on involvement is vividly depicted. He personally inspects an installation in Boca Chica, criticizing inefficiencies and demanding radical simplifications, from the design and packaging of the solar tiles to the installation processes themselves. Despite harsh feedback and direct confrontation with engineers over the practical challenges of installations, Musk's interventions spur on-the-ground innovations, albeit through a trial of fire. Dow and his team, despite the oppressive heat and operational setbacks, manage to demonstrate that Musk's aggressive push for simplification could lead to tangible improvements in installation efficiency.

Musk's volatile yet visionary leadership style surfaces as both a catalyst for breakthroughs and a source of tension. His oscillating moods—from explosive critique to calm acknowledgment of improvements—underscore the high-stakes, high-pressure environment at Tesla Energy. The detailed account of Musk questioning every aspect of the solar roof installation process, demanding engineers to directly engage with the labor-intensive reality of rooftop work, and occasionally capitulating to the practical needs of the installation teams, encapsulates a period of intense experimentation and learning under his watch.

Despite significant strides in process optimization and installation speed, Brian Dow faces the inherent limitations of scaling a labor-intensive business like solar roof installations—a challenge even Musk's brilliance couldn't surmount quickly. Musk's impatience with the slow scaling contrasts with his mastery in manufacturing, marking a tense chapter in Tesla's ambitious venture into solar energy—a testament to Musk's relentless pursuit of innovation, albeit with a recognition of the complex realities of transforming the solar infrastructure landscape.