



# // Comfortable Going Virtual?

ALTA  
WINDOW FASHIONS

- We're here to help breakdown the process
- We'll share the basics
- And share "best practices" from dealers who have jumped in and achieved success

*"Virtual consultations are here to stay.  
Normal will never be the normal that was  
before COVID-19."*



# // Why offer Virtual Consultations?

- Keep your business running
- Makes your customers feel safer
- Stay engaged and connected with your potential customers
  - Screen time is WAY UP
  - People have the time to research and get started on their home design projects.
- Adapt your business to today's digital customer for life post-COVID-19
- AND, book your business up with appointments

- Schedule the virtual appointment, including a pre-chat
- Prequalify via a phone call to help you prepare for the appointment
  - Starts the relationship building
- Email the customer a video chat invitation and a guide on how to measure their windows prior to the appointment (optional)
- Conduct the consultation
  - Be prepared to discuss pricing based on the rough measurements they provided
- Confirm measurements with safe social distancing
  - Some customers will be very comfortable providing measurements with your “virtual” guidance
  - Or the customer stays in your “pipeline” and you visit them when it’s safe to go into their home – but book that time now.

# // Pre-qualifying Tips

- Look for the urgency
- Take any new home opportunities
  - They're frequently vacant and definitely urgent
- Have a conversation with them ahead of the consult
  - Ask them to send pictures of their home, the windows they want done
  - Ask them to share any photos/ideas they may have
- And ask a few questions:
  - Privacy, light control, energy efficiency
  - Children/pets in the house?
  - Any other concerns or things they may be curious about
- Talk about measurements
  - "Estimated" measurements; share the worksheet to show how easy it is
  - If it's a development you've worked in, reference past measurements

# // Your Environment

ALTA  
WINDOW FASHIONS

- Dedicated space
- Clean, Clutter free background
  - Bonus if it has nice window coverings to show off your work
  - ZOOM allows you to add a background in
- Good lighting
- Minimal background noise
- Sample books
- Hand Samples



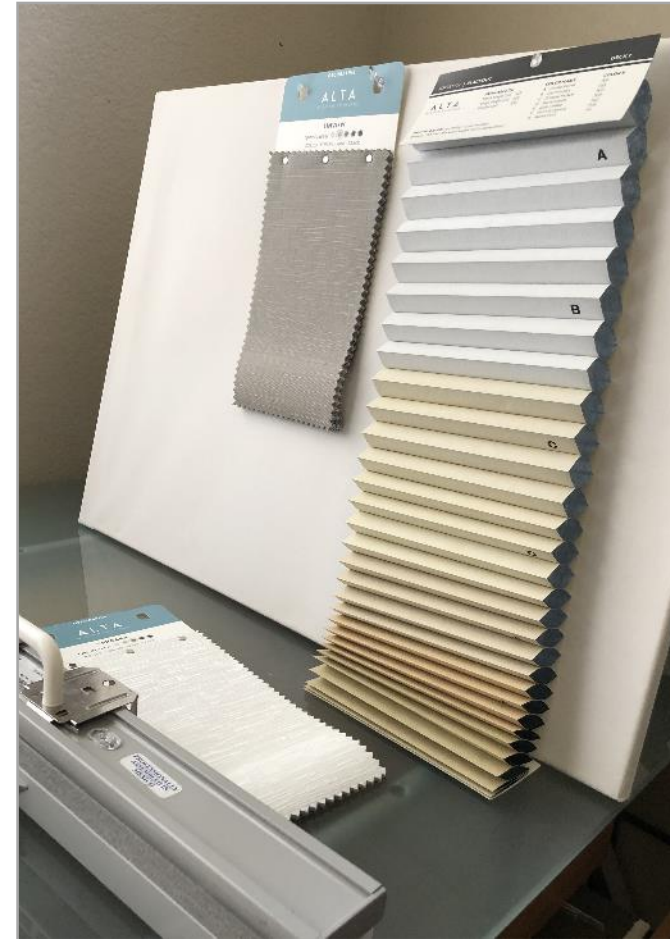




# // White Board

ALTA  
WINDOW FASHIONS

- Easily displays swatches for true color comparison
- Have clips handy to quickly post product swatches your customer shows interest in





## // Practice

- Before your first virtual consultation, PRACTICE
- Practice your process from start to wrap-up
- Test your technology
  - YouTube has quick tutorials on many of the platforms including Google Hangouts or Duo, Skype and Zoom
- Get feedback on your lighting, background, video stability

# // Virtual Design Process

- Be yourself!
- From your pre-qualifying call, confirm your understanding of their style and functional needs
- Show samples targeted to the needs you uncovered
  - Fabrics
  - Demonstrate key control options
- Be prepared to talk about pricing
  - Use the rough measurements you gathered earlier
  - Have ballpark figures available
- Define the next steps
  - Any follow-up defined during the consultation
  - Swatch samples to follow?
  - Appointment to confirm measurements in person later

# // Advertising Virtual Consultations

- Email your customer base
- Phone calls to past customers/leads
- Social media
- Your website
- Postcards

Be sensitive with your message. You're available as a service for those who have the time and desire. Top priority must continue to stay focused on the health and safety of your staff and your community.

// **Congratulations!**

**ALTA**  
WINDOW FASHIONS

You are setting the stage for your business growth post this COVID-19 situation:

- Appointments on the books
- New technology skills
- New service offering

// **And remember...**

**ALTA**  
WINDOW FASHIONS

“To be outstanding, get comfortable  
with being uncomfortable.”  
- Alrik Koudenburg

We believe in You!