**Encouragement Sales Virtual Sales Process**

**Draft 1.5**

**Set the appointment**

Option 1: On Site Consultation

Option 2: Virtual Consultation

**Gathering Home Evaluation information (Virtual)**

HVAC Load Calculation (Virtual)

Acquire Photographs of customers system (Two Options)

Email or Text what photo’s you need and give the customer options.

Option 1: Forward the photos to you prior to your meeting

Option 2: They can be your eyes by connecting to their phone or pad

**Ask if everyone interested in the System design and price will be attending**

**Tell them how much time to allot for (30 to 45 minutes)**

**Set the appointment and e mail or text all relevant information**

**Put all appropriate information into your presentation**

Load Calculation results

System Photo’s

Your Presentation

Pricing and additional work

Be prepared to present

**Virtually connect with your Guest**

Pad or PC. Connection

**Set the Stage**

Person of interest

Agenda

Time commitment

**Discover what your customer wants**

Ask the right questions

Listen to understand

Establish a list of goals

Review Brand and Company Story

**Perform a Virtual Home Evaluation (or Review what you discovered with the photo’s)**

Virtual load calculation

Link to customers pad or cell phone

Perform a virtual walk through

Screen shot photos

Think through your presentation

Discuss Value added discoveries

**Re connect with your customer on Pad or PC**

Stranger Danger

Design considerations (System Operation – Additional Work – System Features)

One Step or two-step call (Can the client make a buying decision?)

Build and review system options. (Review options until they are comfortable with the price)

Assume the sale

**Closing Process**