



1

Manage Expectations (in the Showroom)

- Find a solution to the customer's problem.
- Give them an estimate for the project.
- Show them the plan they can follow to solve their problem.

2

Manage Expectations (During the In-Home Bid)

- Verify the product will solve the customer's problem.
- Explain exactly what work will be done—and how.
- Complete a job walk form and take the appropriate pictures.

3

Manage Expectations (After the In-Home Bid)

- Review the order and scope of work with the customer.
- Get a signed scope of work from the customer.
- Take a deposit for the job.

4

Manage Expectations (During the Confirmation Call)

- Review the order and scope of work with the customer.
- Determine who will provide payment at the completion of the job.
- Review any 'need to knows'.

5

Manage Expectations (Before the Installation)

- Park in the street and ask permission to park in the driveway.
- Explain the scope of work to the customer before starting.
- Protect the job site—and make sure the customer sees you do it.

6

Meet Expectations (After the Installation)

- Verify the customer is happy that the work that was done.
- If there is a problem, don't leave until a plan has been communicated.
- Complete the installation paperwork.

7

Exceed Expectations (After the Installation)

- Call the customer to ask how their product has been performing.
- Answer any remaining questions about the products.
- Ask for an online review.

VIDEO

