

Approved by



## Remote selling for installers

Helping you to keep doing business safely  
in the 'new normal' following COVID-19

Created by



## WORKING SAFELY IN THE HOME

Remote selling has become a buzz phrase during the COVID-19 crisis. It's important when selling to homeowners because being able to sell your services safely and remotely will help you to keep doing business as we all get used to working in the 'new normal'.

This guide is designed to help you limit the number of times that you have to visit a customer's home.

But when you are at their house, most homeowners want reassurance that you will carry out the survey and installation safely and within any social distancing Government guidelines in place at the time.

### QUICK TIP

To give homeowners peace of mind right from the start - send them a guide to your procedures for working safely in their home to reduce the risk of infection from coronavirus.



Download our free Working in the Home information sheet. It includes the essential ways to keep your team and your customers safe.



For Certass members - use the Certass Trade Association Working Safely in your Home Guide and COVID Secure Procedures for Installers Working in the Home.



## WHAT IS REMOTE SELLING?

Remote selling is very different from ecommerce and pricing online. It's an easy way for you to give advice, quote and sell to homeowners the way you always do, but keeping both you and them safe with fewer face-to-face visits.

Some home improvement companies have been doing business this way for years. It makes them more efficient, reduces cost and gives them back valuable time. We've included practical tips and advice from these experienced remote-sellers.

The information included in this remote selling guide is approved by Certass Trade Association and included in Certass TA COVID Secure Procedures for Installers - endorsed by the government supported Trade Association Forum.



Remote selling lets you quote and sell your services safely with fewer face-to-face visits

## PREPARING FOR REMOTE SELLING

Using video chat makes selling remotely a lot easier. Video conference call services like Zoom, GoToMeeting and Google Hangouts are simple to use and can be free.

There are 3 things you need to get set up properly for video chat:



A webcam with a noise-cancelling microphone



Larger laptop or PC screen



A space away from distractions

Spending £60 - £70 on a webcam with a built in noise-cancelling microphone will make all the difference to how you look and sound on screen. If you can't have speakers use an ear piece instead of headphones.

### QUICK TIP

Practice your video calls with family or friends. Does your background look professional? Can you be seen and heard clearly? Is everything working?

Here are 3 things to avoid:



Noise from phones, notifications and people nearby



Sitting with a window behind you



Distracting background clutter behind you

Bright daylight from behind will make your face look like a silhouette. A messy background can be very distracting.

### QUICK TIP

Watch the Balls2 Marketing Zoom conference calling quick start video



## GENERATING SALES LEADS

Social media and your website are both great ways to get enquiries.



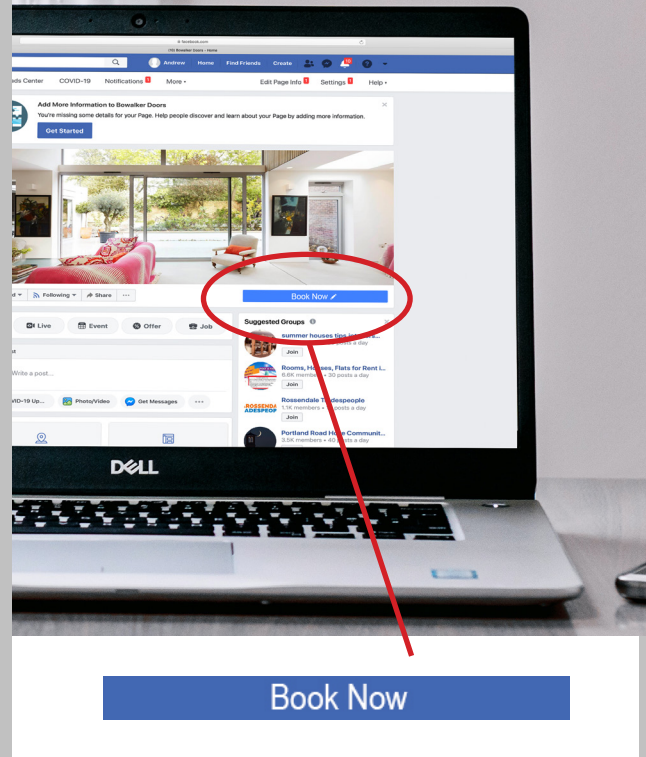
### FACEBOOK

Facebook has everything you need to generate sales leads, it can also do a lot of the remote selling job for you.

Using Facebook messenger is a no-pressure way to chat to homeowners interested in your services.

Adding the 'Book Now' button on Facebook lets homeowners book a timeslot through Facebook Appointments when you're free for a video chat.

**Virtual showroom:** You can turn Facebook and Instagram into virtual showrooms for your business. Showcasing your jobs with photo albums, GIFS, and videos or uploading before & after pictures.



## ARRANGE YOUR APPOINTMENT



### SCHEDULE A TIME FOR YOUR VIDEO CONSULTATION

**Treat your virtual survey & consultation the same as you would a first survey.** It's just as important, so arrange a specific time when the homeowners are available.

To save the hassle of getting diaries together, it's worth using a calendar scheduling app. This way the homeowner can choose a time slot that suits you both.

**Calendar Scheduling Apps:** We've already talked about Facebook Appointments, there are also other apps like Calendly that can manage your appointment diary for you. Calendly will send them an invitation by email, which you can set up with instructions on how to join you on the free voice/video call.

#### QUICK TIP

When you set up the appointment invitation email- include a Consultation Checklist - asking the homeowner to help you prepare for your video chat by sending you photos of the house, some rough measurements or plans beforehand.



### MAKE THE MOST OF YOUR WEBSITE

Your website is often your best salesperson. Make sure it has a photo gallery and case studies of your work, as well as lots of features & benefits about the products you install. You can show and talk about these on your video call to the homeowner. Window & door design Apps are a simple and low-cost way to generate sales leads on your website.



### BE AVAILABLE ANYTIME

Upgrading Facebook messenger with a clever Chatbot lets you answer questions and engage with homeowners when you're not available, or chat to them when you are.

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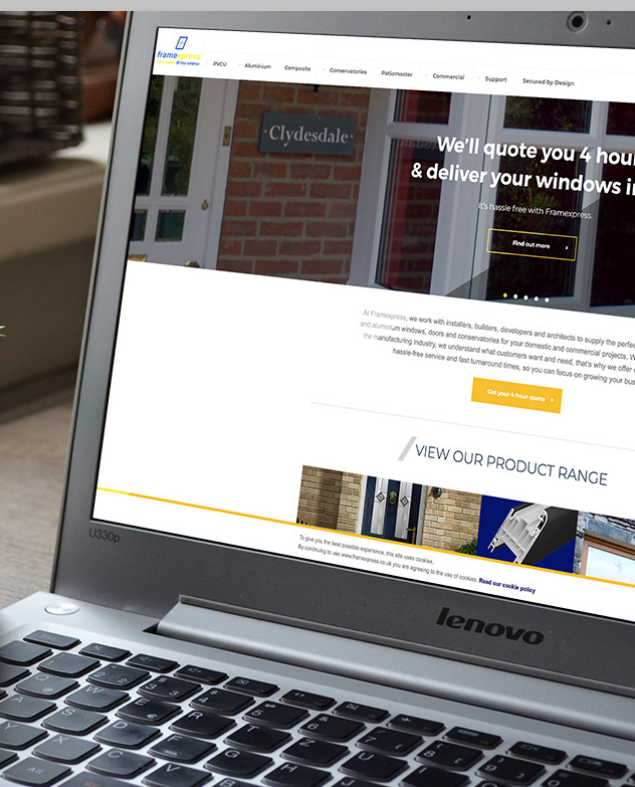
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Download our free Consultation Checklist including a window & door quick measuring guide.

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## VIDEO CONSULTATION

### HAVE A PLAN FOR YOUR CALL

Be prepared for your virtual survey and consultation video call. From the Consultation Checklist you'll already have an idea of what they want and some rough measurements, so you can be ready. If you have examples that may be relevant, have them available to share on your screen.

#### QUICK TIP

Use the shared screen function on the video call. This puts you in control of the consultation and gives you their full attention as you offer advice and ideas.

Once you are all introduced, use the shared screen function to show the homeowners completed projects and product information on either your website, Facebook page or Instagram.

Your product suppliers' websites can also be good for giving homeowners a bit of inspiration!

### USING DESIGN APP SOFTWARE

Adding apps and software such as a composite door, window or bifold door designer to your website will really get your prospective customers involved. Show them how new windows, a front door or glazed extension will look on their house. Or get them to choose colours, styles and glass options on their new windows.

#### QUICK TIP

We've collated a range of great design and quoting Apps from the Glazing Vault and Windowlink - take a look at the options on our website.

### NEED TO DO A SURVEY?

If you need to visit the house before quoting, arrange to do an external survey if possible. In many cases you won't need the homeowner to be there which will save you having to schedule the visit. Remember to take photos for the follow up video call.

## GETTING THE ORDER

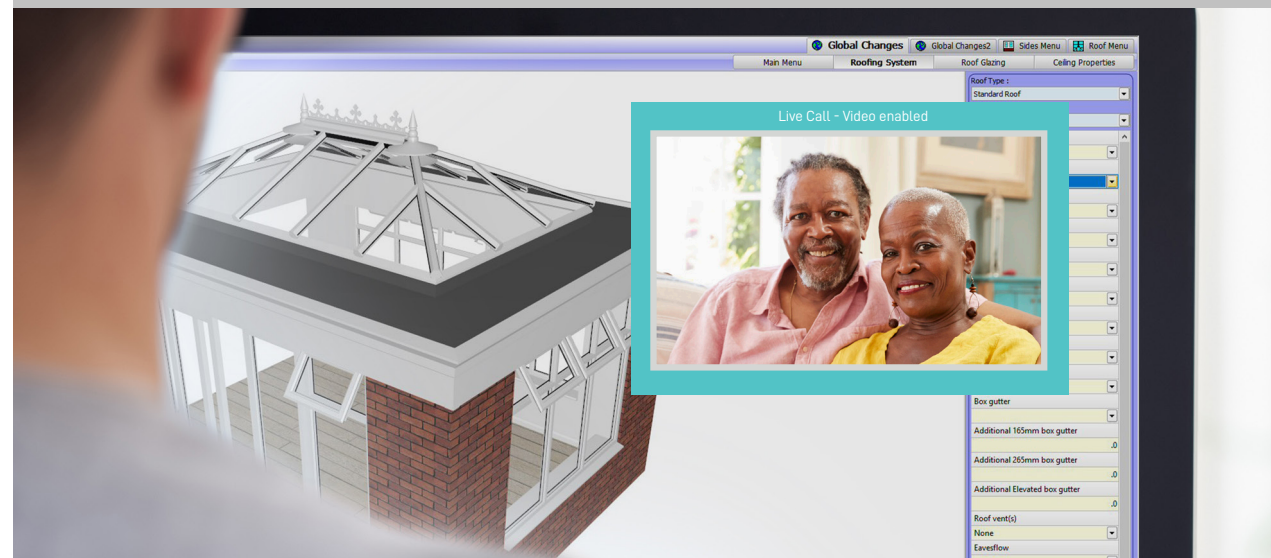
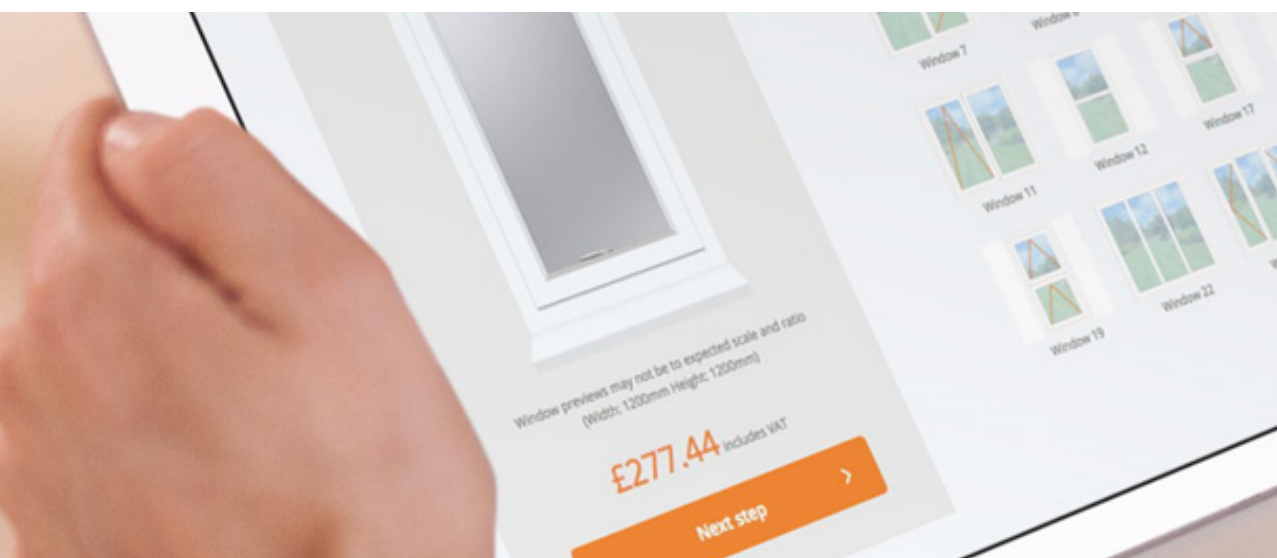
### PRESENTING THE QUOTE

There are some brilliant online quoting apps and software around, many of these allow you to price up the job and create a professional looking quote.

Make sure your sales contract is in a format that can be easily emailed to the homeowner.

#### QUICK TIP

Arrange a time to present the quote by video call. You'll convert more quotes into orders by talking the project through with them.





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**Balls2 Marketing is ready to generate sales leads for you.**

We work with installation companies up and down the UK, delivering award winning marketing strategies that grow sales.

Talk to us about a marketing strategy to grow your business.

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🌐 [www.balls2marketing.co.uk](http://www.balls2marketing.co.uk)

**Balls2 Marketing knows the glazing and home improvement market.**

During the COVID-19 Pandemic we worked with Certass Trade Association to shape the Working safely in the home and remote selling guidance accepted by Government.



Local SEO



Social Media



Product Design Software



Website Design

Created by



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