CLIENT CONSULTATION

A successful Window Treatment Client Consultation process consists of five steps with the approximate length of time listed:

01: GREETING – 5 MINUTES

- Arrive on time
- Enter home and greet client with a smile
- Put briefcase down and ask to see the room/rooms to be consulted on
- Make general notes, write any questions you think of during the greeting

02: DISCOVERY – 10 MINUTES

- Determine the best WT options based on the client needs and/or wants
- Privacy
- Sun control
- Decoration
- All the above
- Inform the client on the benefits of the different options
- Blinds
- Shades – hard goods or soft goods (Roman shades)
- Valances
- Drapery Panels – both functional and, working panels
- Confirm color options which were communicated during discovery call/email

03: SELECTION – 30-35 MINUTES

- Show samples based on the discovery findings
- Ask client to show things they like and things they do not like
- Show blind samples at the window
- Show fabrics at the window or just beside the window
- Show how the fabrics/blinds look together and with the furniture, rugs, artwork in the room
- Read body language and facial expressions as a way of confirming their likes/dislikes

04: MEASURE – 10-30 MINUTES (depending on how many windows/rooms/placement of windows)

- Give the client something to do as you measure – you don't want to be distracted as you measure (more about measuring in an upcoming session)
- Client information sheet
- List of services
- All About Us sheet
- Use the same measuring process each time
- Use a good tape measure
- Write measurements down immediately
- Write any questions or comments you have for the client while measuring

05: EXIT – 10 MINUTES

- Ask the client if they have any additional questions
- Share any additional information you have prior to leaving
- Complete any notes, write fabric names/vendors, etc. in client folder
- Gather samples – do not leave with the client
- Set up follow up appointment if necessary
- Let the client know when to expect estimate and how you will be delivering the estimate
- Thank the client for their time and exit.