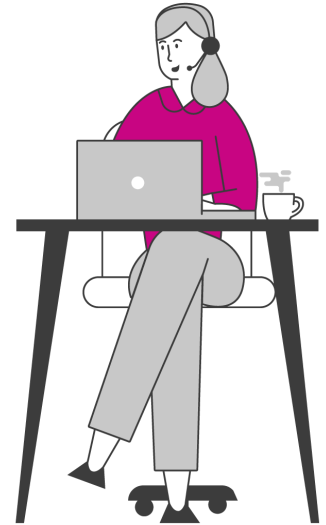




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Virtual Sales Readiness Checklist

Use this checklist to ensure you are prepared to deliver a high quality professional virtual sales consultation.



Tech and Environment

- Verify your equipment is working properly
 - Laptop
 - Camera
 - Microphone
 - Headphone/speakers
- Set up lighting (avoid backlighting; light your face)
- Internet connection is stable (test speed if needed)
- Close all windows + applications
- Turn off any notifications (alerts, pop-ups, etc.)
- Ask others in your home to limit Wi-Fi (maximize bandwidth)

Content & Materials

- Upload virtual background
- Review pre-call customer research
- Stage customer proposal with pricing, adders, energy usage, and customer info
- Set up new quotes in SUNNY, including Lease/PPA/Loan
- Presentation deck/visuals ready

Mindset & Engagement

- Be ready to listen more than you talk (reflective listening)
- Log in 7-10 minutes early—homeowner shouldn't wait
- Greet with a smile and make a strong, friendly intro
- Confirm audio/video is working for everyone
- Maintain eye contact (look at the camera!)
- Encourage questions and interaction
- Keep it clear, focused, and jargon-free
- Smile, be confident, have a customer-first mindset, and have fun!
- Most importantly...close that deal!

