

# VIRTUAL CONSULTATION PREP SHEET



Name: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone Number: \_\_\_\_\_ E-Mail Address: \_\_\_\_\_

**Thank you for your interest in new window coverings. Please take a moment to fill out the information below so we can better understand your needs in advance of our consultation.**

**1** In which rooms are the windows that you plan to cover?  
*(living, bedroom, etc.)*

\_\_\_\_\_

How many windows total? \_\_\_\_\_

What direction do the windows face? \_\_\_\_\_

**2** Please tell us the main reason why you are looking for new window coverings?  
*(replace existing, update look, energy efficiency, etc.)*

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**3** Please rate what's important to you in a window covering  
*(1 – not important, 5 – extremely important)*

Privacy 1  2  3  4  5

Light control 1  2  3  4  5

Energy efficiency 1  2  3  4  5

Style 1  2  3  4  5

Maintaining view 1  2  3  4  5

UV protection 1  2  3  4  5

Glare reduction 1  2  3  4  5

Sound absorption 1  2  3  4  5

**4** Other considerations? *Yes or No*

Large and/or wide windows Yes  No

Special shapes Yes  No

Hard-to-reach windows Yes  No

Easy maintenance Yes  No

**5** Are children or pets in the home? Yes  No

**6** Are you interested in remote control motorization or home automation systems? Yes  No

**7** Please rate your comfort level on the following:  
*(1 – not comfortable, 5 – very comfortable)*

Measuring windows 1  2  3  4  5

Viewing online tools such as sample books/swatches 1  2  3  4  5

Installers entering home for final measurements 1  2  3  4  5

**8** Which virtual platform do you prefer:

- FaceTime
- Google Hangouts
- Skype
- Zoom
- Other: \_\_\_\_\_

**9** What is your preferred time/day of week for a virtual consultation?

\_\_\_\_\_

**10** Do you have any photos of your rooms/windows that you would like to share prior to the consultation? Yes  No

**11** Anything else you'd like us to know about before we get started?

\_\_\_\_\_  
\_\_\_\_\_

**Thank you. We look forward to the opportunity to consult with you on your home decorating project.**