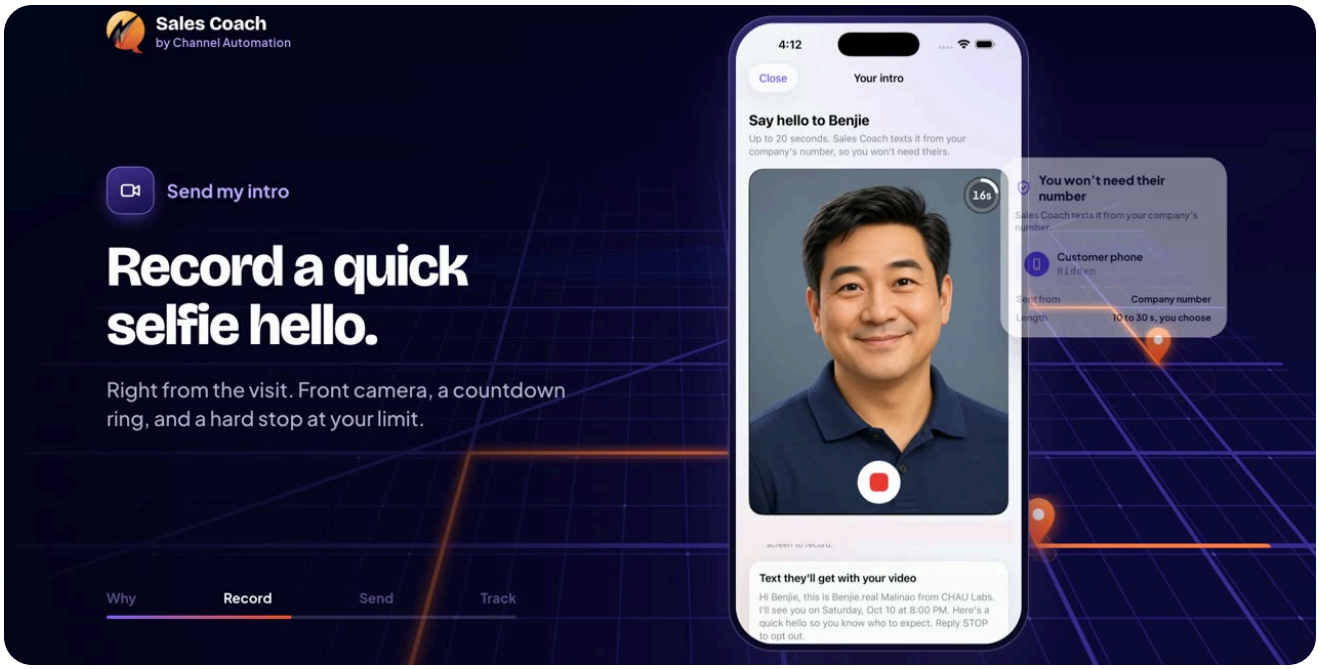
SALES COACH · INTRO VIDEOS · CLIENT GUIDE & SOP

Intro videos: say hello before you knock

Before an in-home visit, the rep records a short selfie video in the Sales Coach iPhone app. Sales Coach texts it to the homeowner from your company's number, with a message your admins write. The homeowner sees who is coming, replies come to LiveChat, and the rep never needs the customer's phone number.

Watch the walkthrough



Watch the narrated 30-second walkthrough at read.appchau.com/intro-videos/

The short version An owner or admin opens **Sales Coach → Settings → Intro videos**, switches on **Let reps send intro videos**, and saves. From then on, every assigned visit in the Sales Coach iPhone app shows **Send my intro**. The rep records, taps **Send intro**, and Sales Coach texts it inside your business hours. Managers follow every intro in **Sales Coach → Intros**.

Why it matters

A homeowner books a visit, then days later a stranger knocks on the door. Many hesitate, and some don't open at all.

Before

The homeowner doesn't know who is coming. Some cancel, some don't answer, and the rep starts cold.

Now

The homeowner gets a short video hello from the rep, from your company's number, before the visit.

Why that helps

A familiar face at the door: fewer no-shows and a warmer first minute. Every intro and reply stays in your CRM.

Admin setup (once)

Owners and admins set this up in the CRM. Managers can see the settings but not change them.

1. Open **Sales Coach**, then **Settings**, and scroll to **Intro videos**.
2. Switch on **Let reps send intro videos**. This also hides customers' phone numbers in the rep app.
3. Set **Longest intro** between 10 and 30 seconds. 20 seconds (the default) keeps the video sharp as a text message.
4. Pick **When to send**: **As soon as allowed (inside business hours)**, or 2, 4, 12, 24 or 48 hours before the visit.
5. Write up to 10 message templates and choose one as **Default**. Use the field buttons to add the customer's name, the rep's name, the visit date and time, and your company name.
6. Check **What the homeowner reads (sample customer)**, then click **Save intro settings**.

FIELD	WHAT IT ADDS
{{contact.firstname}}	The homeowner's first name, or "there" when it's missing.

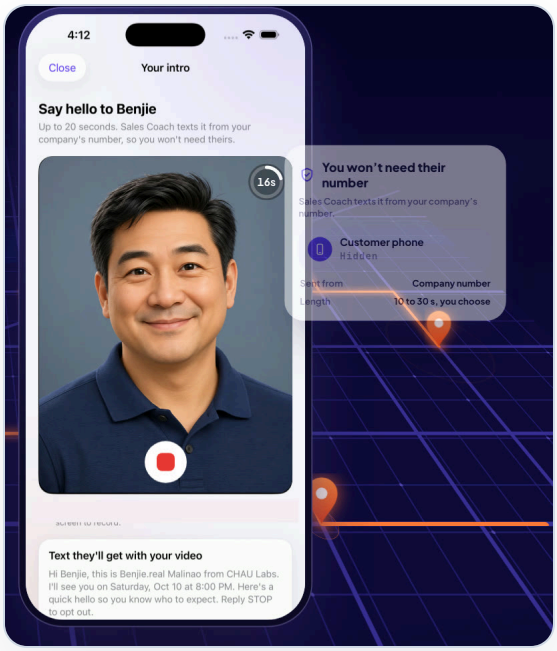
FIELD	WHAT IT ADDS
{{contact.lastname}}	The homeowner's last name.
{{rep.name}} / {{rep.firstname}}	The rep's full or first name, or "your consultant" when it's missing.
{{appointment.date}} / {{appointment.time}}	The visit date and time, in the visit's time zone.
{{workspace.name}}	Your company name.

The starting template reads: *"Hi {{contact.firstname}}, this is {{rep.name}} from {{workspace.name}}. I'll see you on {{appointment.date}} at {{appointment.time}}. Here's a quick hello so you know who to expect. Reply STOP to opt out."*

Every template must tell the homeowner they can reply STOP to opt out. The settings won't save without it. Turning intro videos off cancels every intro that hasn't been sent yet.

Rep: record and send an intro

1. In the Sales Coach iPhone app, open the visit and tap **Send my intro**.
2. The front camera opens under **Say hello to {first name}**. Tap the red button to record. The ring counts down and stops at your team's limit.
3. Watch it back. Tap **Retake** to try again, or **Send intro**.
4. If your team has more than one template, pick one under **Text they'll get with your video**.
5. You'll see **Your intro is on its way**. The visit card then shows **Intro queued**, **Intro sent**, and finally **Intro delivered**.



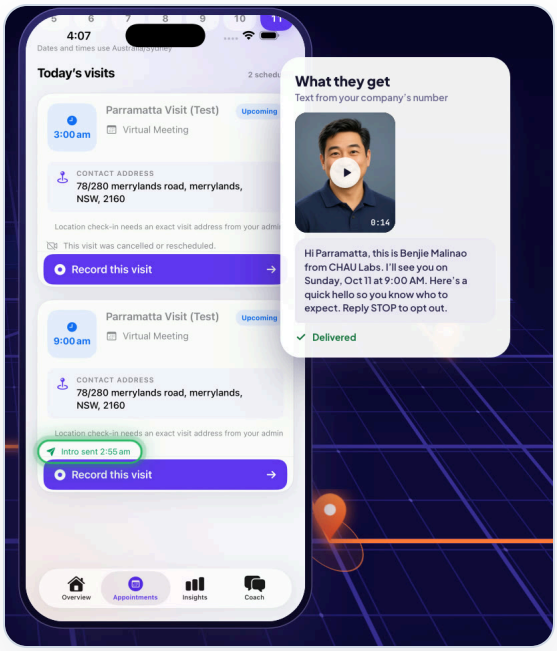
EXAMPLE Recording an intro on the visit.

Keep it short and friendly: your name, the company, the visit time, and something like "see you then".

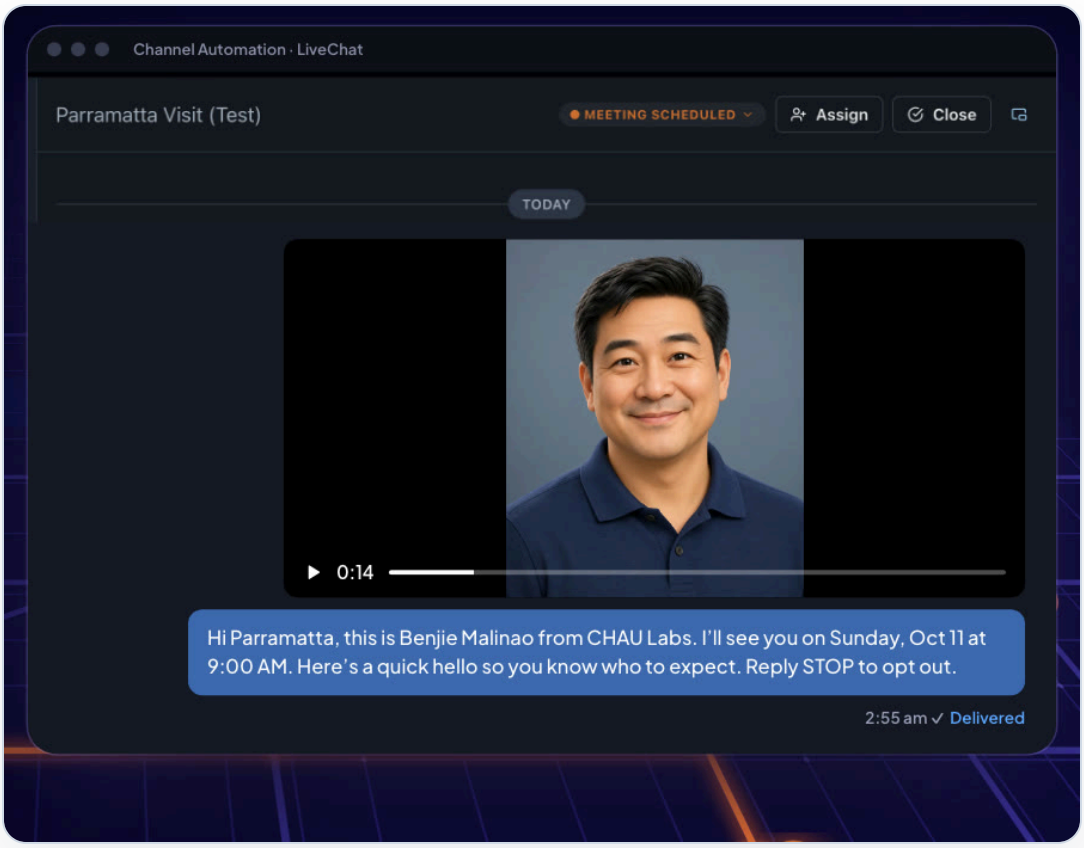
One intro per visit. Once an intro is queued or sent, the button is replaced by its status. If it didn't send, the card says why and, where possible, lets the rep record a new one.

What the homeowner gets, and where replies go

- A text from your company's number: the same number that customer already texts with. The video plays right in the message.
- The message is your template, filled in with their name, the rep, and the visit time.
- **Replies come to LiveChat**, on that contact, not to the rep. The intro itself is saved in the contact's conversation, so your team sees exactly what was sent.
- On the contact page, the Sales Coach visit shows "Rep's intro video delivered" (or sent, or queued).



EXAMPLE What the homeowner receives.



EXAMPLE The intro saved in the contact's LiveChat conversation.

When an intro goes out, and when it never does

RULE	WHAT HAPPENS
Business hours	Intros only go out inside your business hours, or 8am–8pm in the visit's time zone if business hours are off. Outside them, the intro waits.
When to send	"As soon as allowed", or the hours before the visit you chose. It always goes out before the visit starts.
No time left	If there's no business-hours time before the visit, it isn't sent, and the rep sees "There was no time inside business hours to send it before the visit."
Visit changed	A visit that is cancelled, rescheduled, already started, or already has an outcome never gets an intro, even one already queued.
Opt-outs	Customers who opted out of texts or are marked do-not-contact are never texted.
Phone number	Only US or Canadian mobile numbers. No mobile number on file means no intro.
Kept for	Intro videos are deleted 60 days after sending.

Managers: the Intros view

Open **Sales Coach → Intros**: every intro video your reps sent in the last 14 days, and when the homeowner got it. It refreshes on its own.

COLUMN	WHAT IT SHOWS
Rep · Customer · Visit	Who sent it, to whom, for which visit.
Recorded · Text sent	When it was recorded and when it was texted.
Status	The badge below, with the reason when it didn't go out.
Channel	RCS or MMS, depending on the homeowner's phone.

COLUMN	WHAT IT SHOWS
Rep page	"Opened" and when, if the homeowner opened the rep's Meet Your Rep page.
Video	**Play** to watch the intro.

STATUS	MEANING
Uploading · Preparing video	The rep just sent it; the video is being readied for texting.
Waiting for send time	Queued for your send window.
Sending · Sent	On its way to the homeowner.
Delivered · Read	It reached the homeowner's phone (Read where their phone reports it).
Didn't send	It failed. The reason shows under the badge.
Not sent	It was stopped on purpose: the visit changed, the customer opted out, or intros were turned off.

Allow a new intro appears only when sending could not be confirmed. The homeowner may already have it. Check with them first; otherwise they get two.

Privacy

- While intro videos are on, reps don't see customers' phone numbers or email addresses in the app, so every conversation stays with your team.
- Texts always come from your company's number, never the rep's personal phone.
- Every message tells the homeowner they can reply STOP. Opted-out and do-not-contact customers are never texted.
- Videos are deleted after 60 days.

Who can do what

ROLE	CAN DO
Rep	Record and send an intro for their own assigned visits, in the Sales Coach iPhone app.
Manager	See the settings and the message preview, use the Intros view, and Allow a new intro.
Owner, admin	Everything above, plus turn intro videos on or off and edit the length, timing and templates.

Daily routine (2 minutes)

1. Reps: record tomorrow's intros at the end of the day, from the visit card.
2. Managers: open **Intros** each morning. Look for **Didn't send** and read the reason.
3. Check LiveChat for replies to intros, such as gate codes, parking notes or reschedule requests.
4. Use **Play** now and then to coach reps on a warm, short hello.

Troubleshooting

WHAT THE REP SEES	WHY	FIX
"Intro videos are turned off for your team."	The setting is off.	An owner or admin switches it on in Settings → Intro videos.
"There is no mobile number on file for this customer."	No mobile number on the contact.	The office adds one to the contact.
"This customer has opted out of text messages." / "marked do-not-contact."	The customer asked not to be texted.	Don't send. Call the office line instead if needed.

WHAT THE REP SEES	WHY	FIX
"This visit was cancelled or rescheduled." / "has already started."	Intros go only to upcoming, unchanged visits.	Send from the new visit, if there is one.
"Intro didn't send. There was no time inside business hours..."	The send window closed before the visit.	Record intros earlier, or choose a shorter "When to send".
"Your team has no number to text from yet." / "Texting isn't set up for your team yet."	Your workspace can't send texts yet.	Ask your admin or account manager.
"The video was longer than the limit." / "couldn't be made small enough."	The recording was too long or too large to text.	Record a shorter one.
"We couldn't confirm your last intro was delivered."	The send may or may not have arrived.	Ask the office. A manager can use Allow a new intro after checking with the homeowner.
"Turn on camera and microphone access..."	The phone blocked the camera or microphone.	iPhone Settings → Sales Coach → allow Camera and Microphone.

Questions

Does the rep need the customer's number? No. Sales Coach sends the text from your company's number.

Can a rep send a second intro for the same visit? No. One intro per visit, unless the last one didn't send or a manager allows a new one.

Who answers the homeowner's reply? Your team, in LiveChat. The reply lands on that contact like any other text.

Does it work with Meet Your Rep? Yes. The Intros view shows when the homeowner opened the rep's page.

Questions? Ask your account manager, or open **Help Docs** inside the app — the same guidance lives there.