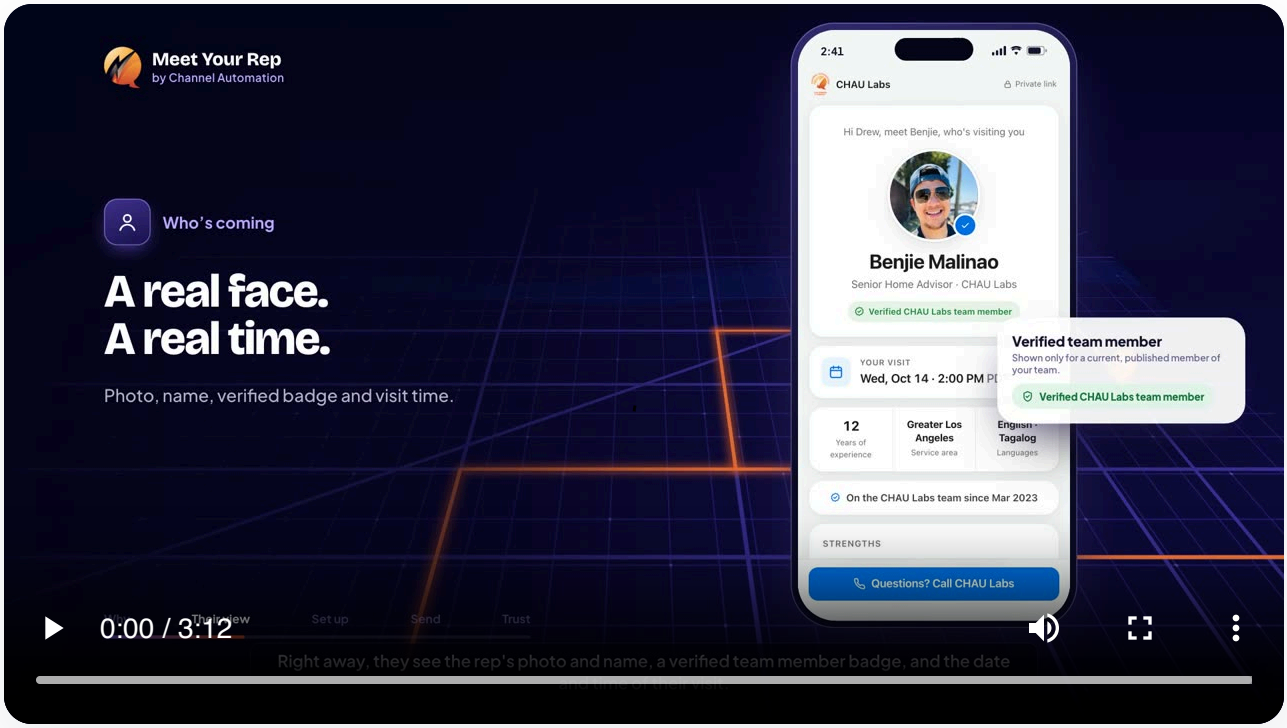
SALES COACH · MEET YOUR REP · CLIENT GUIDE & SOP

Meet Your Rep: put a face to the name, before the knock

Before an in-home visit, text the homeowner a private link to a page about the rep who is coming: their photo, a verified team member badge, the visit time, their experience and how they work. Homeowners know who to expect, so fewer cancel or leave the door shut, and your rep walks in with trust already started.

Watch the walkthrough



A narrated tour of this guide, about three minutes. Turn on captions with the CC button. The names and times on screen are example data. Prefer paper? Download the PDF.

The short version Each rep fills in **Profile → Public profile** once and switches on **Publish**. Before a visit, open the contact, go to **Sales Coach**, make sure the visit has a **Visit rep**, and click **Send text to homeowner**. LiveChat opens with the message written; read it and press **Send**. Nothing to switch on.

Why it matters

A homeowner books an appointment, then a few days later someone they have never met knocks on their door. Many hesitate.

Before

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

Now

The homeowner gets a text with the rep's photo, name, verified badge and the visit time before anyone knocks.

Why that helps

A familiar face at the door. Fewer no-shows, and the conversation starts warmer.

What the homeowner sees

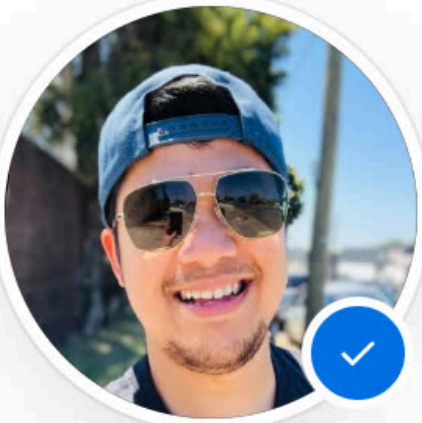
The link opens a fast, phone-friendly page. It needs no app and no sign-in.

PART	WHAT IT SHOWS
Greeting	"Hi Drew, meet Benjie, who's visiting you". Only the homeowner's first name.
Rep	Photo, name, title and company, with a **Verified team member** badge.
Your visit	The date and time, with the time zone (for example "Wed, Oct 14 · 2:00 PM PDT").
At a glance	Years of experience, service area and languages.
Team since	"On the CHAU Labs team since Mar 2023".
About them	Strengths, how they work, a short bio and certifications.
Call button	**Questions? Call {your company}**. It always calls your company number, never the rep's personal phone.

CHAU Labs

Private link

Hi Drew, meet Benjie, who's visiting you



Benjie Malinao

Senior Home Advisor · CHAU Labs

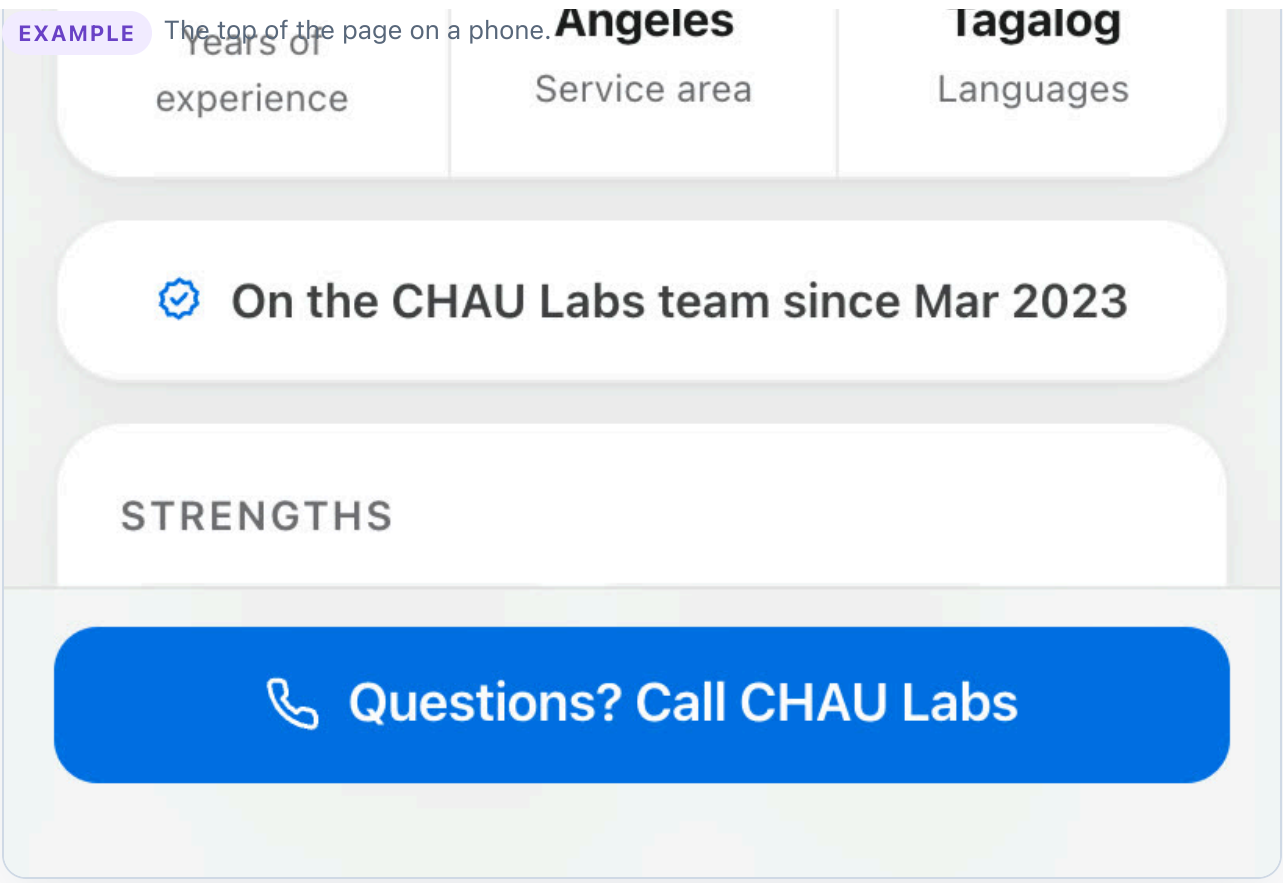
Verified CHAU Labs team member

YOUR VISIT

Wed, Oct 14 · 2:00 PM PDT

12	Greater Los	English ·

EXAMPLE The top of the page on a phone.

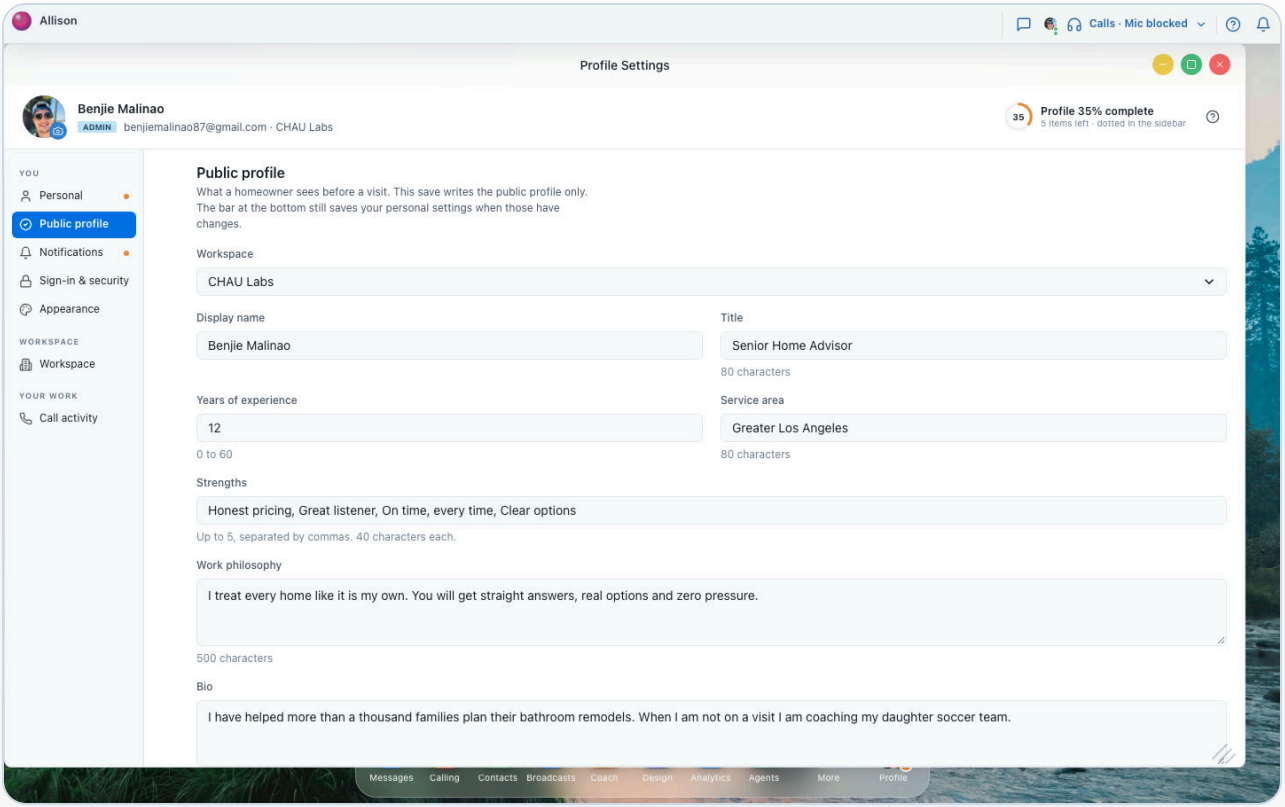


Your company name, logo and phone come from your email brand kit. If the logo or phone in it isn't a valid image or US number, the page shows your initials and hides the call button. Update the brand kit to fix it.

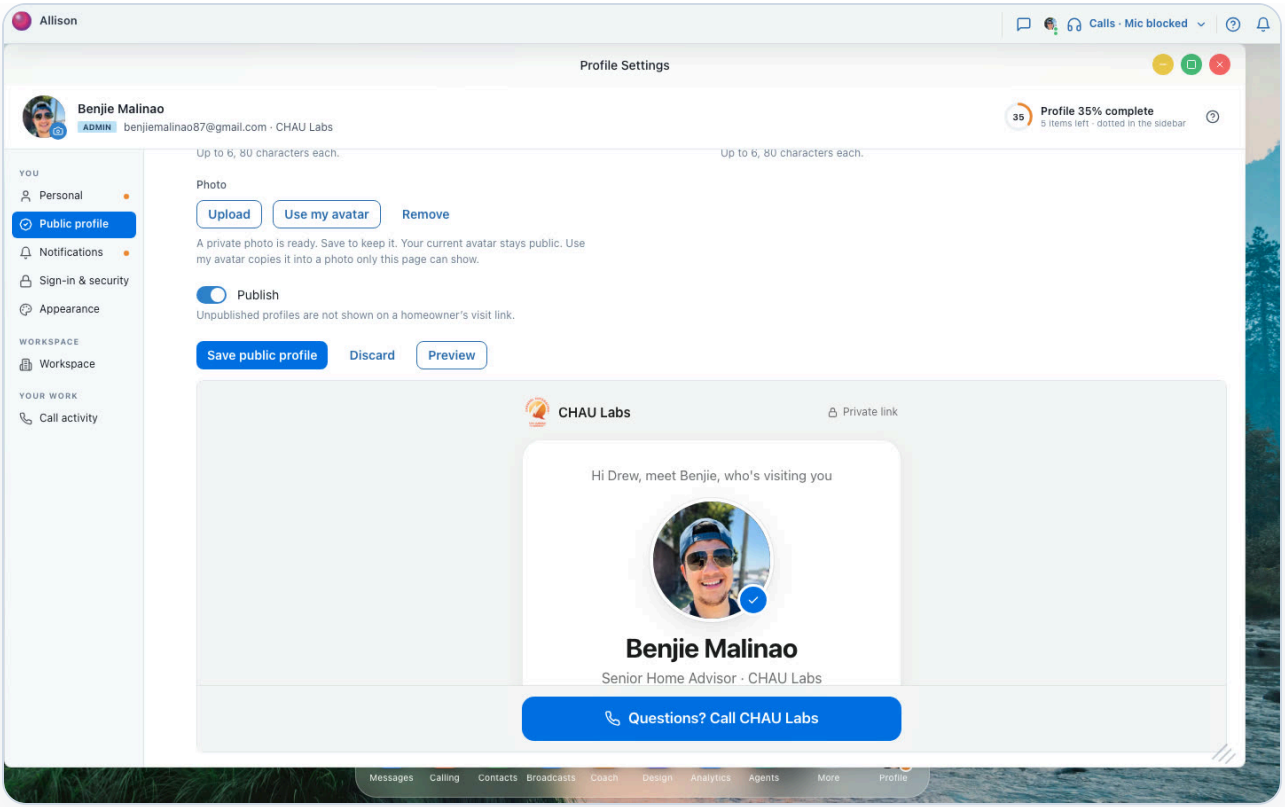
Rep setup: fill in and publish a Public profile

Each rep does this once, in their own profile. It takes a few minutes.

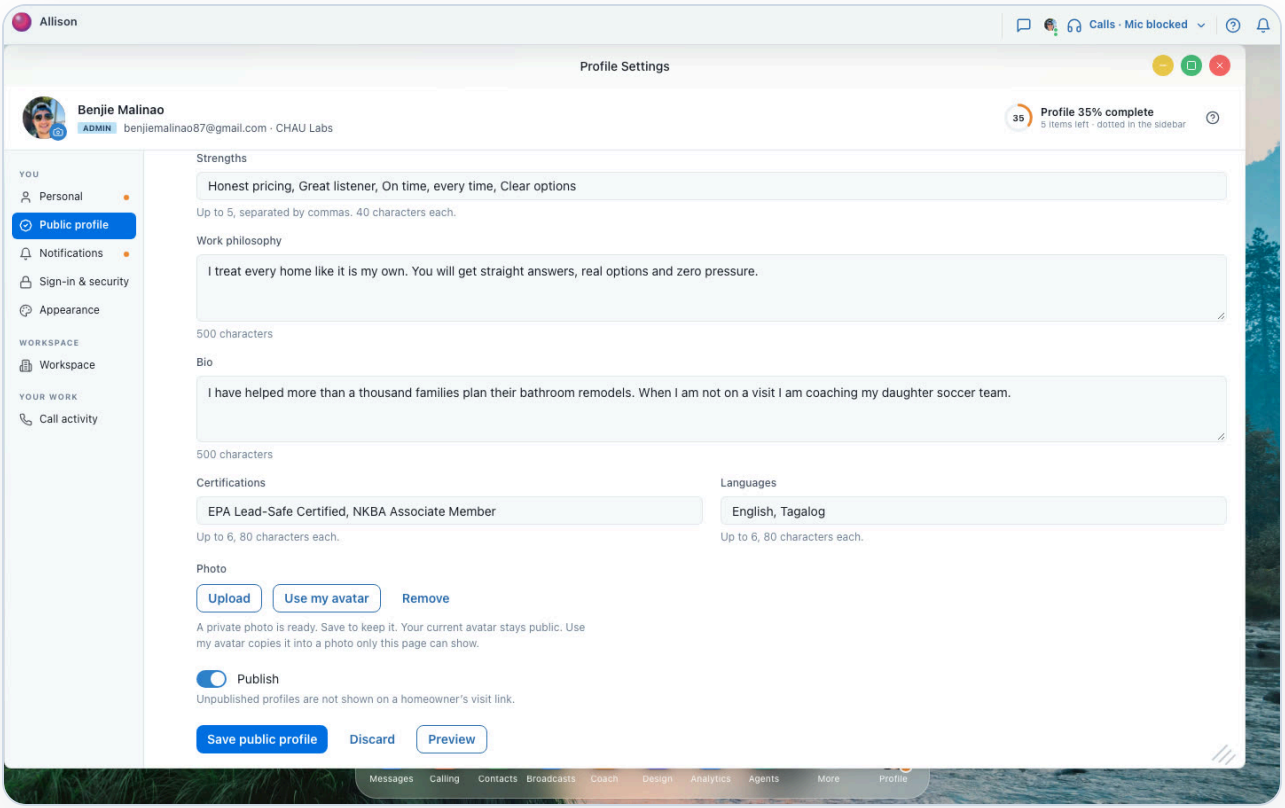
1. In the dock, click your avatar (**Profile**), then choose **Profile**.
2. In the left rail under **You**, click **Public profile**.
3. If you belong to more than one workspace, pick the **Workspace** this profile is for.
4. Fill in **Display name**, **Title**, **Years of experience** and **Service area** (a region such as "Greater Los Angeles", never a home address).
5. Add **Strengths** (up to 5, separated by commas), your **Work philosophy**, a short **Bio**, **Certifications** and **Languages**.
6. Add a photo: **Upload** a new one, or click **Use my avatar** to copy your current avatar.
7. Click **Preview** to see the page exactly as a homeowner will.
8. Switch on **Publish** and click **Save public profile**.



EXAMPLE Profile Settings → Public profile.



EXAMPLE Preview shows the homeowner page, even before you publish.



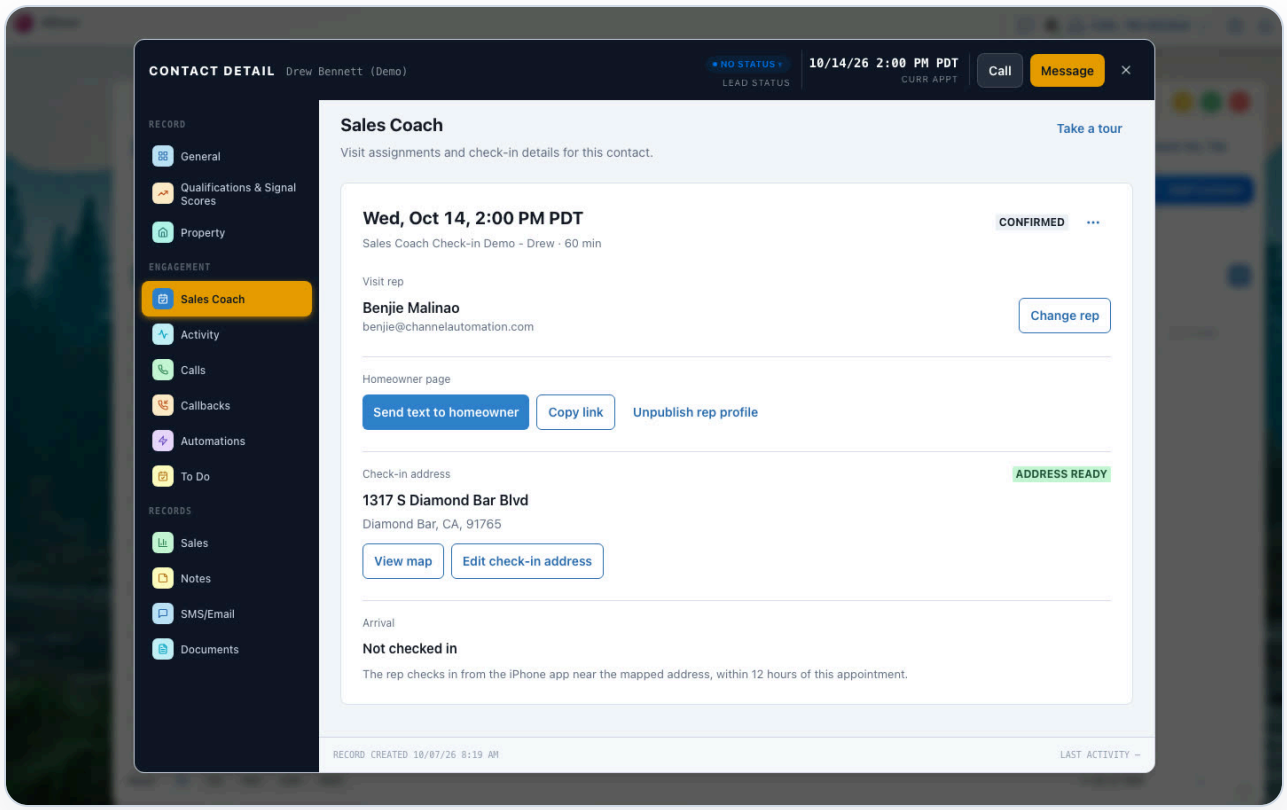
EXAMPLE Switch on Publish, then Save public profile.

Nothing is shown to homeowners until you publish. Until then, a visit link shows your company and the visit time instead of the rep. Using your avatar copies it into a private

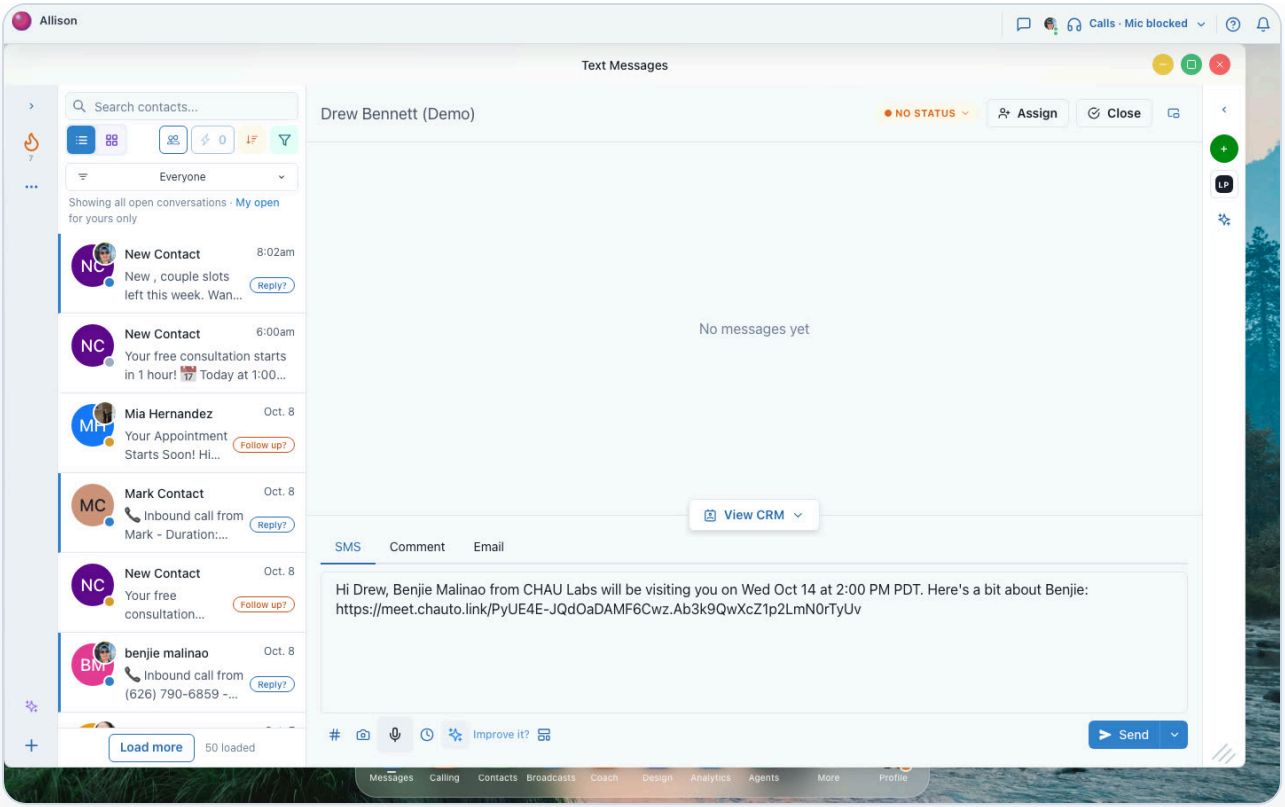
photo that only the visit page can show; your avatar itself stays as it was.

Send it before the visit

1. Open the contact and go to **Sales Coach**.
2. Check the visit has a **Visit rep**. Use **Assign rep** or **Change rep** if needed.
3. Under **Homeowner page**, click **Send text to homeowner**.
4. LiveChat opens on that contact with the message already in the SMS box. Read it, change anything you like, and press **Send**.



EXAMPLE The Homeowner page section on a Sales Coach visit.



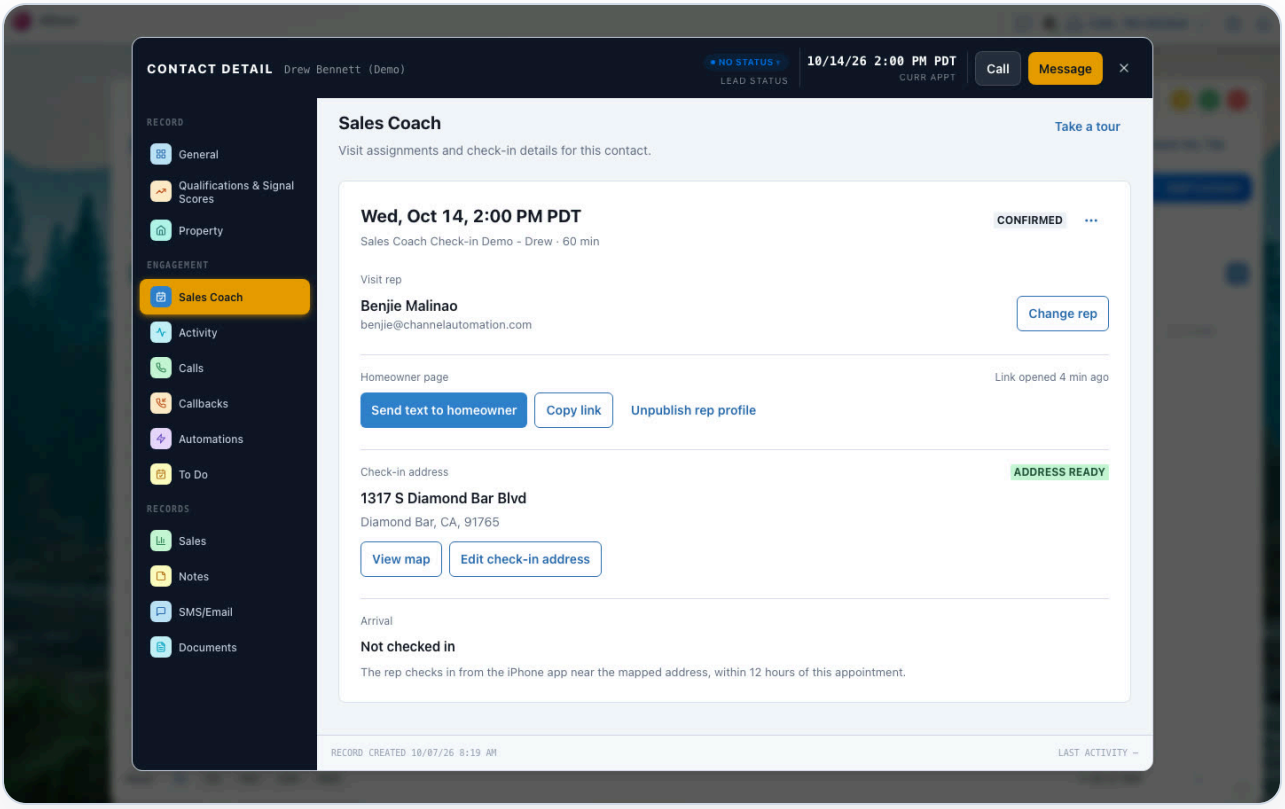
EXAMPLE The text is written for you. Nothing is sent until you press Send.

BUTTON	WHAT IT DOES
Send text to homeowner	Opens LiveChat with an editable text and the link. Works only for an upcoming visit.
Copy link	Copies the link for email, your own phone or anywhere else. Works for any visit.
Unpublish rep profile	Owners and admins only. Hides that rep's profile from every homeowner link straight away.

The text goes through the normal LiveChat send, so contacts who opted out or are on Do Not Contact are blocked as usual. Quiet hours aren't enforced on manual texts, so send during sensible hours. If you have an unsent internal note open in LiveChat, your note is left alone and the text is copied instead: paste it into SMS when you're done.

Link opened

Once the homeowner opens the page, the visit shows **Link opened** with how long ago. Hover it to see the first open and how many opens were recorded.



EXAMPLE Link opened, right on the visit.

It's a best-effort signal. Link previews that phones fetch automatically are not counted, but your own test opens are. Use it as a sign the homeowner looked, not as proof they read every line.

Privacy and what happens when things change

SITUATION	WHAT THE HOMEOWNER SEES
Upcoming visit, rep published	The rep's profile and the visit date and time.
Upcoming visit, no rep or not published	Your company and the visit date and time.
Visit already happened	The rep's profile, without a date.
Visit cancelled or rescheduled	"This visit was updated" and your company's call button.
Rep changed after sending	The new rep, the next time they open the link.
Rep removed from the workspace or unpublished	Your company instead of the rep.
No time zone on the appointment	The page leaves out the date and time rather than guess.

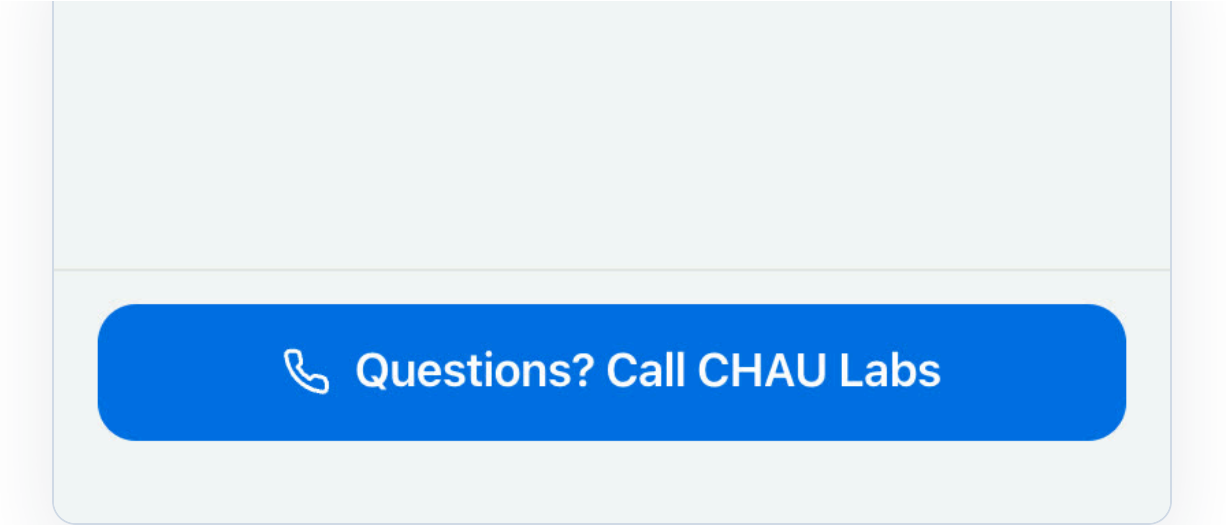
CHAU Labs

Private link

This visit was updated

Please contact CHAU Labs for your current appointment details.

Shared privately by CHAU Labs for your visit. Please don't forward this link.



A cancelled or rescheduled visit.

- Each link belongs to one visit and can't be guessed. The page is hidden from search engines.
- The page shows only the homeowner's first name and the visit time. No address, phone or email.
- The page asks homeowners not to forward the link.

Who can do what

ROLE	CAN DO
Any member	Fill in, preview and publish their own Public profile.
Manager	Send text to homeowner and Copy link from Sales Coach visits they can see.
Owner, admin	Everything above, plus Unpublish rep profile for any rep.

Daily routine (2 minutes)

1. Look at tomorrow's visits and make sure each has a Visit rep.
2. Send each homeowner their rep page the day before, during business hours.
3. Glance at **Link opened** the next morning. No open? A quick call confirms the visit.
4. When a new rep joins, ask them to publish their Public profile in their first week.

Troubleshooting

WHAT YOU SEE	WHY	FIX
No Homeowner page section on the visit	The feature isn't set up for your workspace yet, or you're not an owner, admin or manager.	Ask your account manager, or an owner or admin.
Send text to homeowner is greyed out	The visit has passed, or was cancelled or rescheduled.	Copy link still works. For a new date, use the new visit.
"This rep hasn't published a public profile"	The Visit rep hasn't switched on Publish.	Ask them to publish, or send anyway: the homeowner sees your company.
"No visit rep yet"	Nobody is assigned to the visit.	Assign a Visit rep first.
No date or time on the page	The appointment has no time zone.	Set the appointment's time zone in your calendar or CRM.
Initials instead of your logo, or no call button	The brand kit logo or phone isn't valid.	Fix the logo or phone in your email brand kit.

WHAT YOU SEE	WHY	FIX
"Use my avatar" says it can't copy	The avatar is a colour, or wasn't uploaded in the app.	Click Upload and choose a photo.

Questions

Does it send anything automatically? No. Every text is reviewed and sent by a person from LiveChat.

Can a homeowner see other visits or other reps? No. A link shows one visit and the rep assigned to it.

Is there a star rating? Not yet. The page shows how long the rep has been on your team instead, so every detail on it is something you can stand behind.

Is there anything to switch on? No feature switch. Reps publish their profiles, and you send links when you're ready.