

Home Automation Showroom Conversion Playbook

A conversion playbook for home automation and AV firms that want stronger showroom follow-up, clearer site-survey progression, and less drift between premium interest and booked discovery.

Custom integrators, showroom teams, founders, and project sales leads

GUIDE

A conversion playbook for home automation and AV firms that want stronger showroom follow-up, clearer site-survey progression, and less drift between premium interest and booked discovery.

WHAT THIS ASSET COVERS

- A progression model for showroom visits, discovery calls, site surveys, and proposal-stage handoff
- Follow-up structures for premium buyers who need confidence without feeling chased
- A friction audit for where high-value projects stall after the first strong impression

USE THIS WHEN

1. The firm gets strong showroom interest but too many projects stall before discovery or proposal
2. The business wants a premium follow-up rhythm that still feels intentional and controlled
3. Sales quality depends too much on individual reps remembering the next step

WORKING ASSET

HOME AUTOMATION SHOWROOM CONVERSION PLAYBOOK

A practical playbook for custom integrators and AV firms that want more showroom, site-survey, and discovery-call momentum.

THE REAL LEAK

Most premium integrators do not lose because the prospect dislikes the brand. They lose because the next step feels vague after the first strong interaction.

CONVERSION SEQUENCE

1. Inquiry comes in
2. Buyer gets a fit signal fast
3. Discovery or showroom step is proposed clearly
4. Site survey is framed as a confident next step
5. Follow-up continues without sounding needy

SHOWROOM HANDOFF STANDARD

- capture project type
- capture home status: new build, retrofit, renovation
- capture top priorities: theater, whole-home audio, lighting, security, networking
- set the next milestone before the interaction ends

FOLLOW-UP RHYTHM

Day 0

- recap the conversation
- confirm next step

Day 2

- share one relevant proof or project example

Day 5

- resolve the most likely unanswered concern

Day 10

- close the loop with a specific booking path

PREMIUM POSITIONING RULE

Do not sound casual. Do not sound generic. Do not sound pushy.
Every next step should feel measured, high-control, and worth the premium.

SCORECARD

- showroom-to-survey rate
- survey-to-proposal rate
- proposal stall reasons
- average time from inquiry to booked discovery

PROVIDED BY

DEPLOYMENT NOTES

HOW STRONG TEAMS ACTUALLY USE THIS ASSET

- Assign one accountable owner instead of letting "Home Automation Showroom Conversion Playbook" become shared but unmanaged work.
- Use it with custom integrators, showroom teams, founders, and project sales leads in a weekly rhythm so the asset drives decisions rather than sitting in a folder.
- Decide in advance what counts as green, watch, and red performance so the team knows when to escalate.
- Capture learnings directly in the document every week so the asset becomes smarter over time instead of resetting to zero.

BEST DEPLOYMENT SEQUENCE

- The firm gets strong showroom interest but too many projects stall before discovery or proposal
- The business wants a premium follow-up rhythm that still feels intentional and controlled
- Sales quality depends too much on individual reps remembering the next step

WHAT SEPARATES A SERIOUS VERSION FROM A BASIC TEMPLATE

- Clear ownership for every step, not generic advice without accountability.
- Targets, thresholds, or decision rules that tell the team what good looks like.
- Specific working components: A progression model for showroom visits, discovery calls, site surveys, and proposal-stage handoff, Follow-up structures for premium buyers who need confidence without feeling chased, A friction audit for where high-value projects stall after the first strong impression.
- A built-in review cadence so the document becomes part of operations rather than a one-time download.