

Virtual Visits

A guide for SmartAC contractors

Virtual Visit 101

A Virtual Visit (VV) is a short, personalized video you record directly from the SmartAC dashboard and send to a homeowner member via email. It gives them a clear, human review of how their HVAC system is performing — without anyone needing to set foot in their home.

Think of it as a remote check-in: you pull up their system data, walk through what you're seeing, and deliver the update in a way that feels personal and proactive. The homeowner gets a video in their inbox that looks professional and branded to your company.

Virtual Visits are a core part of how contractors demonstrate ongoing value to members — turning the data SmartAC is already collecting into a visible, tangible touchpoint.

What the homeowner receives

When you record and send a Virtual Visit, the homeowner gets a branded email containing:

- A personal greeting with your company name
- A short message noting what you reviewed
- A playable video walking through their system health report

From their side, it looks like a thoughtful check-in from their trusted contractor — not a generic notification.

How Virtual Visits fit into your membership program

Virtual Visits serve two distinct purposes depending on where a member is in your workflow:

1. Proactive member touchpoint

For members with healthy, low-risk systems, a Virtual Visit is a way to stay in contact, demonstrate the value of their membership, and keep your brand top of mind between service visits.

2. Pre-service diagnostic and scoping

For members showing early warning signs or scheduling an upcoming service call, a Virtual Visit allows your team to review system data, assess the issue remotely, and arrive on-site with the right parts and knowledge. This reduces truck rolls and ensures follow-through, especially when you're just getting started.

When to do a Virtual Visit

Good candidates

Use the following filters in your SmartAC dashboard to identify members who are good fits for a Virtual Visit:

- **System age under 10 years** — newer systems are less likely to need in-person attention
- **Low breakdown risk** — sort by risk score and start from the bottom
- **No active alerts** — alerts require a phone call or in-person visit, not a video

Decision guide

Work through these steps to determine whether a Virtual Visit is the right move for a given member:

1	Is the hub offline?	Yes Call member directly to discuss connectivity issue and next steps	No Continue to step 2
2	Is the system 10+ years old?	Yes In-person inspection recommended	No Continue to step 3
3	Are there active system alerts?	Yes In-person inspection recommended	No Continue to step 4
4	Do you have available tech capacity?	Yes Consider scheduling an in-person visit	No Virtual visit is the right call — proceed

When NOT to do a Virtual Visit

Some situations call for a direct phone call instead. Skip the video and call the member directly if any of the following apply:

Call instead of recording a Virtual Visit when:

- The member has been enrolled for less than 60 days — new members benefit more from a personal introduction call
- There is an active system alert — alerts signal a real issue that warrants a direct conversation
- The hub is offline — if you have no live data to review, the video has nothing meaningful to show

How to record and send a Virtual Visit

What you'll need

Virtual Visits are recorded using Loom, a free screen recording tool. Before you get started:

- Sign up for a free Loom account at loom.com
- Download the Loom desktop app or browser extension
- Full setup instructions are available in the Virtual Visit Playbook inside your SmartAC dashboard
- Note: Free Loom accounts have a limit of 5 videos at a time, so you'll need to delete older videos as you create new ones

Designate a champion



Before rolling out Virtual Visits across your team, assign one person to own and manage the program. A dedicated champion helps keep the process consistent, builds the habit, and ensures follow-through. This is especially important when you're just getting started.

Recording steps

Once you've identified a good candidate using the filters above:

- Go to your SmartAC dashboard, click the **Members** tab, and navigate to the **Performance** tab
- Select the member you want to review
- Click **Record a New Virtual Visit**
- Watch the example video first if you're new — it walks through exactly what to cover
- Record your walkthrough using Loom (see the playbook for guidance)
- The platform automatically sends a branded email with the video to the homeowner

What to cover in the video

Use the script template below as a guide. You don't need to hit every point on every visit — tailor it to what's most relevant for each member based on their data.

Introduction

Example opening:

"Good afternoon, [Member Name]. My name is [Your Name] with [Company Name]. I'm recording your Virtual Maintenance Visit for the HVAC system at [address]. Let's take a look at how things are going."

Walkthrough checklist

Work through the following topics during the recording:

Topic	What to cover
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Performance alerts	Review any current urgent performance alerts and explain what they mean in plain language.
Hardware health	Go over hub battery life, signal levels, and connectivity. If anything needs attention, direct them to Virtual Tech Chat.
Air filter status	Check filter health and give an estimate of when a replacement will be needed. Remind them they can order through the app if they have a filter voucher.
Water issues	Check whether any water issues are listed in the dashboard and flag anything that needs attention.
Last service date	Note when the system was last serviced and flag if a tune-up is coming due.
System age & lifespan	Review system type, age, and manufacturer. Mention the typical lifespan of around 12 years and give an honest estimate of where they stand.
Cycle details	Walk through system performance and cycle data. Give an overall performance rating: Excellent, Good, or Fair.
30-day trends	Review average cycle time and daily runtime from Daily Trends over the past month.
Seasonal context	Tie the review to current or upcoming weather conditions so the homeowner understands why it matters right now.
Membership benefits	Remind them of any unused perks, comfort/loyalty credits, or services included in their plan that they haven't taken advantage of yet.
App login	Encourage them to log in to the app. If you can see they haven't logged in yet, let them know you'll resend their welcome email so they can get set up.

Closing

Example closing:

"As a reminder, if you have any questions, you can reach us via chat in your SmartAC homeowner app. You can also see details about your system's performance in the Cycle Details section of the app. We'll be back in touch for your next Virtual Maintenance Visit in about six months. Thank you, and have a great day!"

Tips for a great Virtual Visit

- **Lead with good news.** Point out what's working well before flagging anything that needs attention.
- **Be specific.** Reference their actual system data — age, brand, last service date — so it feels personal, not scripted.
- **Use seasonal context.** Tie the review to what's coming up weather-wise so the homeowner understands why it matters now.
- **Mention unused benefits.** If they haven't used their filter voucher or comfort credits, remind them — it reinforces the value of their membership.
- **Keep it concise.** Aim for 3–5 minutes. Homeowners are more likely to watch a focused video than a long one.
- **Stay consistent.** A cadence of roughly every six months keeps the touchpoint meaningful without becoming background noise.