Virtual Meetings Playbook

Financial Professional best practices

The key to delivering a successful virtual meeting comes down to planning basics and execution. Consider the following as you master the art of engaging in a virtual environment.

Tools to consider

Software

A variety of virtual meeting software options are available in the marketplace, some being GoToWebinar, WebEx, Zoom and others. Depending on the type of content you'll deliver online, identify the right option for you. REMEMBER: Not all software options offer the ability to edit videos before delivery, so you may need another software to add that capability to your toolbox.

Hardware

Lighting

Even a fantastic camera will have a tough time producing a solid picture in poor light. Shooting with lighting will create depth and represent you better than typical office or conference room lighting might. When you're ready:

- Consider a basic photography lighting kit to achieve consistency and a good shot every time.
- Set your lighting up to "angle down" to create a warm and natural look.
- Use light dampening blinds or shades to prevent glare or a backlit experience from sunlight

Webcam

You don't have to break the bank to deliver a good online experience. Any web camera with at least 1080p will do the trick.

White Board/Flip Chart

If you plan to draw or share visual content during your webinars, consider purchasing a flip chart or white board for your virtual studio. If you use a white board, install so it's angled slightly downward (top at least 1 inch from the wall) to reduce glare.

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Headset

A headset helps you minimize distractions and includes a microphone to capture clean audio for uninterrupted conversations. When choosing a headset, a wired option might be preferable to Bluetooth to avoid audio delay.

Best practices

Before the meeting

- Make sure you are licensed in the resident state of the client.
- Provide an agenda prior to the call, which is professional and brings clarity and focus to the conversation.

Kicking it off

- Be early and begin on time!
- Start off with a welcome message, thank them for attending and try to "make it personal" with at least one participant, e.g., "Hey Mike, you made it. Thanks for joining today."
- Mute everyone at the beginning to avoid background noise and mention that you'll address all questions at the end of the presentation.
- Always include the following in slides:
  - "Bookend" slides: One slide at the beginning, repeated at the end that provides your image and contact information.
  - After the initial "bookend" slide, include an agenda to review all the topics you'll cover.
  - The third slide should always be a statement or "plug" for your unique value or selling proposition.

Closing the call

- As you wrap up the presentation, repeat some of your early slides to bring things to a close:
  - Bring back the agenda slide to review what you've covered and add some "sales spin."
  - Repeat your bookend slide, and provide additional contact information, including website, LinkedIn profile, etc.
  - Include clear call to action so all parties understand the next steps and a timeline of events.
- Always include a Q&A session at the end, using a system chat feature if desired. If your audience uses chat, make sure you thank the individual for the question, read the question aloud and answer the question for the group.
- Wrap up the Q&A by thanking them for their time and for their thoughtful questions.
- Be respectful; end on time and make sure the attendees know you'll follow up soon via phone or email.

Following up

Reach out to your attendees via email or call 24 hours after the webinar to thank them for their time, reinforce key concepts, share meeting notes and talk about next steps.

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Keys to making it impactful

- Practice, practice, practice
  - Get comfortable with your equipment and set up 15 minutes before each call.
  - Limit potential for background noise or distractions.
  - Record, watch and critique yourself before the call.
- Engage your audience through high energy delivery.
- Use personal stories to illustrate key concepts.
- Use humor, when appropriate.
- Be authentic, sincere and relatable — don't be robotic.
- Repetition, repetition, repetition.
- Be concise; don't include a lot of "filler" content.
- Technical issues will occasionally happen; don't get derailed. Stick to the agenda and drive a productive meeting. Always be ready to adapt!
- Inspire the attendee(s) to take action.
- Always mention your virtual capabilities, especially eApp and Docusign.

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