12 tips for effective web meetings with clients

In today's unprecedented times, it's necessary to come up with new strategies for doing business. Holding client meetings virtually instead of welcoming them into your office will be an important service, especially for older clients. Use these 12 tips to help you hold an effective web meeting – no matter where you are.

1. Choose the right technology for the job

Think about the things you want to accomplish during the meeting: for example, will you need to show them something on your computer screen? Will you want to see something on theirs? Knowing the answers to these questions will help you determine which meeting technology to use.

2. Turn on your web camera and ask them to do the same

Although talking to a camera takes some getting used to, body language is a vital part of communication.

3. Email a personalized meeting invitation

Include simple log-in instructions and a personalized greeting. Do not rely on a meeting app's default invitation to set the appointment!

4. Share an agenda and any documents you'll discuss before the meeting

If your client wants to discuss a specific document during their meeting, ask them to send it to you ahead of time.

5. Control your image

Make the call in a room that gives a strong first impression, such as a boardroom or your office (but only if it's clean!). Buying a webcam instead of relying on your computer's built-in one gives you more control and a better picture. A few simple tricks, like positioning the camera so it's at or slightly above your eyeline, avoiding back-lighting, and clearing up clutter behind you, can go a long way.

Give us a call

We talk to your peers every day and can share some of their best practices.

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6. Get creative with hospitality

You can't offer a beverage or take a coat, but you can make time for small talk and find other ways to make a connection and put your client at ease.

7. Security is critical

Whatever meeting technology you choose, make sure it offers end-to-end encryption so the meeting is secure. Zoom's security protocol makes it the preferred meeting technology for many financial professionals.

8. Build in time for troubleshooting

Extend your normal meeting time by a few minutes in case there are technical difficulties. Or if you have support staff, they could call the client before the meeting to talk them through setting up the technology.

9. Use visuals as much as possible

They can help keep your client engaged throughout the meeting. Just make sure to have them ready and open ahead of time!

10. Split the video and audio feed

If a client has a spotty internet connection, consider asking them to call in on their phones and mute their computer audio. If their image freezes, you'll still be able to hear what they're saying.

11. Make sure all the right people are on the line

And if they're not, offer to set up a three-way (or four- or five-way) conference call to get the necessary family members, partners, other financial professionals, etc. "in the room" as well.

12. Update your website to include "virtual meetings" as an offered service

Include a screenshot of an online meeting so clients know what to expect, plus a link to download the meeting technology you use most often.

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