

12 Ways

To Make You A Better Financial Services Entrepreneur™

Virtual Meetings - BEST PRACTICES

1 **Prepare in Advance:**

- Prepare for your meeting well in advance. Make sure the technology is working, sounds and lighting are good.
- If you are going to present PDF's, Power Points, worksheets, etc., make sure they are already open and ready to be displayed. For Power Points, if possible, have them in presentation mode. The experience should be much like real life as possible.

2 **Co-Pilot/Host:**

- Having a co-pilot can help for larger meetings because they can signal you when things are going wrong. This will allow you to focus fully on the camera.
- For ZOOM meetings, this will allow admittance to the meeting, spot lighting, etc.
- They can also mute all or anyone that is being disruptive. They can also remove them from the call/meeting.

3 **Camera:**

- Try to focus on the camera and not the screen. Your customer is looking at their screen and if you look at your screen, they will be looking at you looking down and not into their eyes.
- External cameras are better and come with more features and are more versatile.
- Placing the camera at eye level gives the other users the feel of a more personal meeting.

• *My Personal Webcam*

4 **Audio:**

- Remember to pause for questions. Pause until it feels awkward and then count to 10 to encourage engagement.
- Plug your earpiece into your phone or computer for the best connection.
- Wireless headphones can create a delay between your audio and video.
- Make sure your cord is tucked in and not pulling attention away from your presentation.
- Make sure you understand how to Mute All or how to mute a person that is disrupting the meeting.

5 **Lighting:**

- 3 Point Lighting is Key.
- If you don't have a budget for lights, position your workstation facing an open window.
- In addition to making sure you are well lit, make sure there is light in your background.

• *My Ring Light* • *My Smaller Ring Light* • *My Fill Lights*

6 **Background:**

- Turn your camera on 15 min ahead of your meetings to make sure nothing in your background will take away from your meeting.

- An all-white back drop can be purchased from Amazon to help with noise cancellation and to help pull attention to a whiteboard.

- Using a neutral wall as your backdrop can help to eliminate distractions for advisors/clients.

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Props:

- White Board with Extra Black Markers. You would be surprised how easy they are to lose.
- Some people are color blind and may not be able to see other colors as clearly.
- Practice writing using large print
- Take long pauses at the end of ideas. Sometimes there is a question.
- Hard copies of Sales Material
- When using video after going over the digital copy holding the hard copies up helps to make it real.
- Company Coffee Mug

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Annotation:

- Boxes – Great for highlighting important numbers and large groups of numbers.
- Pen – Great for walking people through the material and pulling their attention towards key points.

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Dress:

- If you wake up and dress for business every day, you will be prepared to interact virtually with all of your clients and will drive more business.
- Client's may be logging in at home, but they still want to work with someone that looks like they are ready for business. In fact, it may be good to over dress compared to in person meetings. Earning trust in a virtual environment can be more difficult than in person.

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Internet Connection/Speed:

- You can test the speed of your connection at:
<https://www.speedtest.net/>

- Using a wired connection instead of WIFI will increase your speed

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VPN:

- VPNs can throttle back your internet speed and cause a delay between your audio and video.

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Sound Proofing:

- Carpet helps absorb sounds.
- Work in a room that is carpeted and place a throw rug in the hall leading to your office.
- In the office, have noise canceling curtains to prevent people from hearing other noise from the home – kids, dog, etc.
- White Noise – Sometimes having a fan on in the background

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We are here to support you and help you thrive in the era of virtual meetings. Call us today at **1-800-639-2032** or visit our resources tab at TheProducersFirm.com for more Financial Services Entrepreneur™ tools.