Checklist to Help You Implement Effective Online, Virtual Meetings

by Bill Bachrach

Just in time for what could be the 'new normal' for many months to come, here are some practice management strategies for Financial Advisors communicating with clients and prospects using an online, virtual meeting tool.

Below is a simple checklist of practice management items to consider when conducting effective online meetings. Feel free to add more items to it, based on what your process needs to be, so you can conduct great online meetings.

___ Set up your workspace with minimal distractions (easier said than done) and make sure you have a professional-looking background.

___ Utilize a professional online virtual service such as Zoom or GoToMeeting. Don't do simple phone or free service virtual video calls with prospects, as this is your image you are putting out there, and calls can be choppy and unprofessional.

___ Test all of the functions and features, so you know how to navigate the virtual video calls, and guide clients and prospects on how to connect with you.

____ Set up proper lighting and background, so it looks and feels professional. Can they see your face well? Wear darker colors as photographers recommend this when doing professional photo shoots.

____ Go to your internet provider and get the best possible connection speed. Check out ways to get faster internet speed, such as hardwired cable versus Wi-Fi. Close all unnecessary windows before doing online video calls, and getting a faster router that can deliver what your internet provider offers. Here is a link to test your internet speed from your location - https://www.speedtest.net/

___ Make sure you have an HD camera and good sound from your microphone for the best quality experience. I use noise-canceling headphones and a hands-free microphone. Make sure you have plenty of battery power available, if any device uses batteries. You don't want to have your headphones fail in the middle of a conversation, if at all possible. That is why you would have a back-up available, just in case.

___ Update your technology. Look at getting high-quality headphones and a microphone. Consider sending an online meeting kit to clients and prospects, to help them connect to the world better.

___ Before the meeting, tell your client or prospect you will call them (Or your assistant will call them) to make sure it is set up on their end properly. Don't expect them to know how to use the technology, their camera, microphone, and computer setup. Some may have never done an online, virtual meeting

____ Send an email about how to connect to your video call along with instructions on having a camera and microphone set up. Help them to eliminate any distractions during the call and how to have the best experience possible for your meeting. How will a couple set up the call together and how will you see them both? They may need to think about how to sit together for the call, so you can see both of them. Positioning the camera, laptop, or computer, so they have the best experience, is also important from your side.

____ Remind your clients to close any open browsers on their computer, so the call has the highest quality. Suggest the fastest computer in their home that is hardwired, if available. If not, they will have to use Wi-Fi. This is why cell phone video calls don't work as well, and calls can easily get dropped.

___ Record the online meetings with clients and prospects (as you would meetings in your physical office), with letting them know this first, of course. This is the perfect time to improve your conversations with clients, by listening to the discussion. You might consider starting with a friend or colleague to test your process out first before scheduling them with your clients. The more you do them, the more confident you will become at using your tools.

____ Engage your clients and prospects by using the proven client acquisition tool, the Financial Road Map. Send them a fresh copy via mail well before the meeting and let them know when to expect this. Use your Financial Road Map Interview scripts within the Advisor**Roadmap** Virtual Training Platform. If you aren't a member of Advisor**Roadmap**, simply use your script and process you would normally do when meeting at your office.

____ Ideas to help you with prospects. Do you have compelling offer for prospects? Do you have a script to use to deliver these offers online? Practice your script and process online with a friend or colleague before calling or setting up a video conference with ideal prospects. Meeting them online through professional-quality online meeting will speak volumes compared to their Financial Advisor who is doing email and phone.

___ Databases and data security. Consider updating your privacy and confidentiality forms with staff, to ensure complete confidential protection of data.

___ Online scheduling. Consider using an online calendar for clients and prospects to set up an online meeting with you. You can program the scheduler to do 30 or 60-minute calls, and all you have to do is email clients with the link. For example, you can use online scheduling services such as https://calendly.com/, https://www.appointy.com/, https://www.appointmentcore.com/, https://www.timetrade.com/, https://www.genbook.com/, and other automatic scheduling services.

You might have additional items to add to this general checklist to make it work in the best possible way for you.

For more resources and to watch the timely and relevant web training replays by Bill Bachrach, go to: https://www.youradvisorroadmap.com/atria-covid-19-free-advisor-resources/

"We must never become too busy sawing to take time to sharpen the saw."
– Stephen Covey