

High Impact Virtual Meetings



Presented By



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America's Virtual Experience

25%

Adults have used video conferencing

27%

Say same as in-person

64%

Believe virtual connections will be helpful, but won't replace in-person meetings

Barriers with virtual meetings:

- Distance – physical and relational
- Distractions – environment and electronic



Agenda

- Identify ways to overcome virtual meeting barriers
- Sharpen your virtual presence
- Set yourself up for success for virtual meeting

Goal

To equip you with skills that will elevate your virtual client experience

Client Experience



Proactive Communication



Virtual vs Office Experience

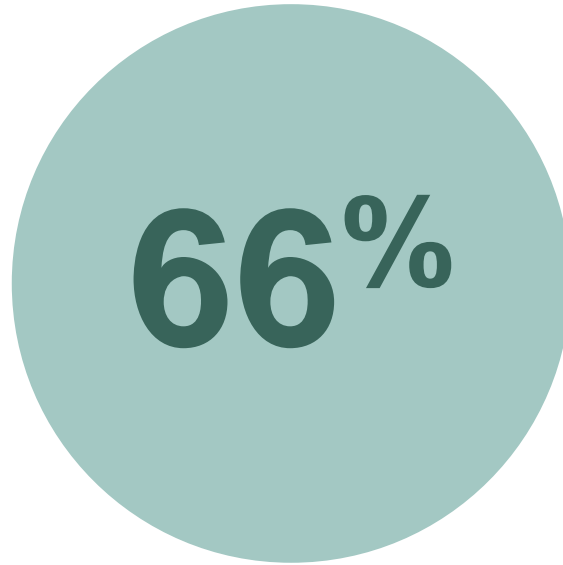


Client Benefits





senior executives surveyed by *Forbes*



report that **virtual teaming** will be par for the course most days



say video communications will have a positive impact on performance and that **video creates a greater sense of trust**

A woman with dark hair tied back, wearing a headset with a microphone, is smiling and looking towards the camera. She is wearing a light-colored, possibly white, top. The background is a blurred office or meeting room setting. The entire image has a semi-transparent green overlay.

Virtual Meeting Best Practices

Using the Q&A feature, answer the following question

With several months of virtual meeting experience, what's been working for you or your firm?

Getting Started

Get Familiar with
The Software



Getting Started

Invest in the Proper
Equipment



Optimizing Virtual Presence



Camera Position



Framing



Background



Lighting



Sound Quality



Optimizing Physical Presence



Focus eyes on camera when speaking to attendees



Stand if possible, if sitting be sure to have good posture



Be aware of gestures, use them when appropriate



Before

- Invite the right people
 - Create agenda
 - Collaborate with clients
 - Send Information for review
 - Help client prepare
 - Make sure you are prepared
 - Why are you having this meeting?
 - What does the client need?
 - Have a back-up plan.
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During

- Join early
 - Introductions
 - Make personal connections
 - Share agenda
 - Acknowledge latecomers
 - Keep engagement high
 - Check in periodically
 - Preview and explain documents
 - When talking focus on the camera
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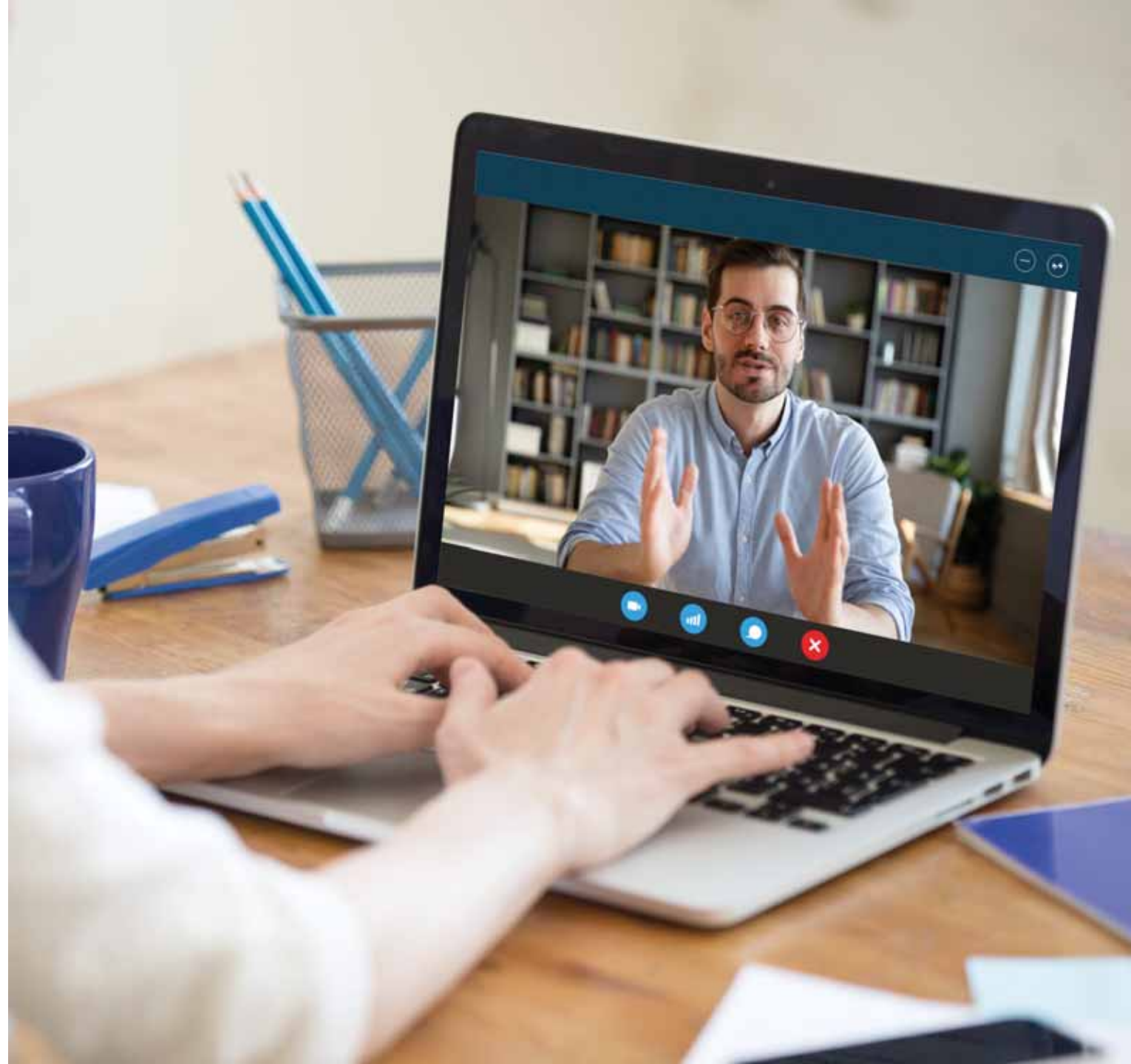
After

- Follow up with client as needed
 - Gather client feedback
 - Record details in CRM
 - Debrief meeting internally
 - what worked
 - what could be better
 - Develop procedures and update them regularly
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Audience Chat

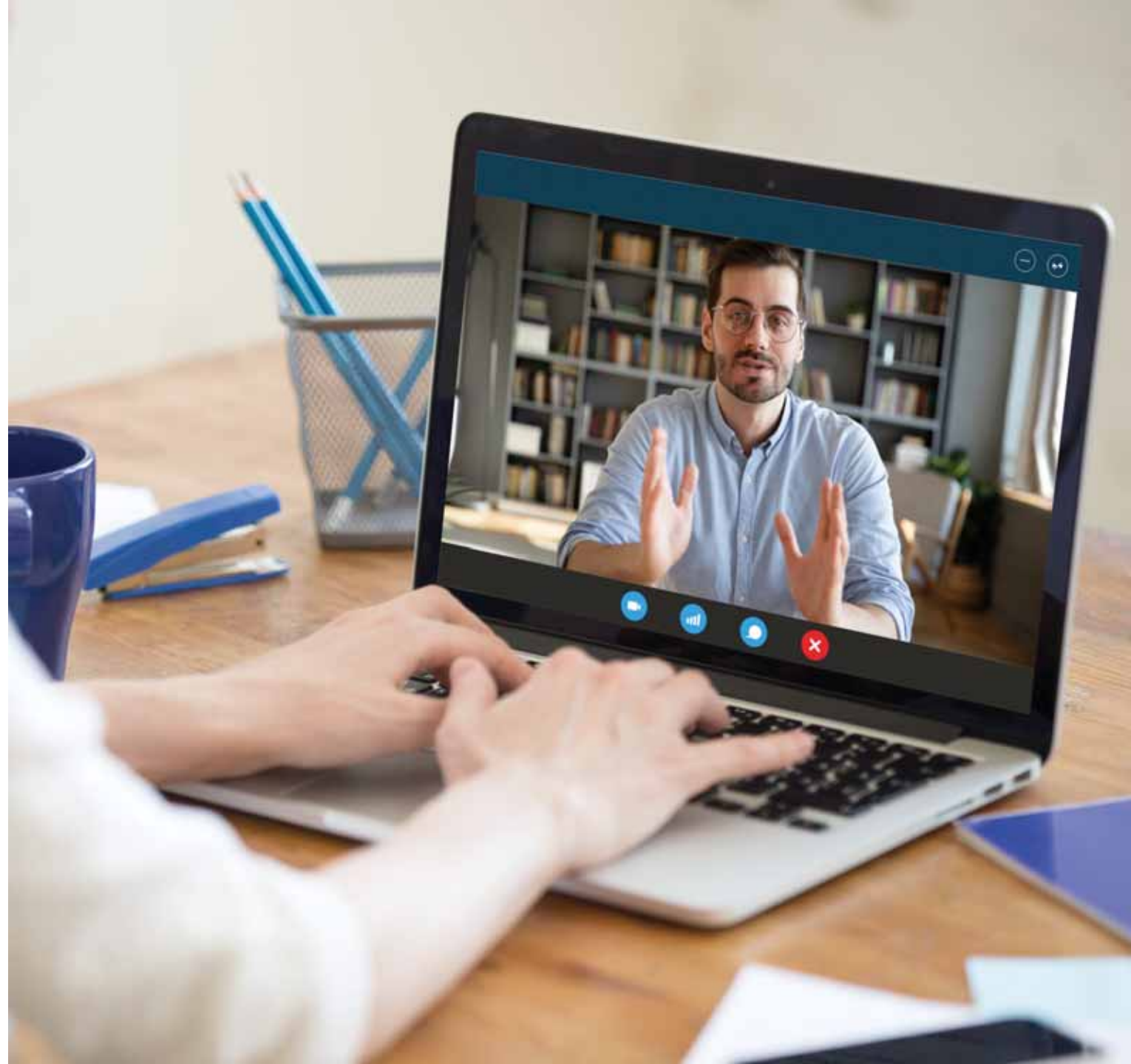
*Using the Q&A feature,
answer the following question:*

**What did you learn today
that you plan to use for
yourself or your team?**



Summary

- Get your environment right
- Prepare, prepare, prepare
- Be aware of your virtual presence
- Practice makes progress
- Share feedback with each other
- Develop virtual meeting procedures





Thank you