

Continuing to embrace technology

With many of us navigating a work environment redefined, continuing to embrace technology will help you remain present for your clients. From fully remote to fully in the office, or somewhere in between, the need for balance between impactful client connection and scalability for capacity can feel more elusive than ever. While many of us have become proficient at using the many options to help deliver effective client meetings virtually, consider the following best practices to help you shift from virtual by default, to virtual by design.

Consider these 10 best practices when engaging clients through virtual meetings:

BEST PRACTICES FOUNDATION

1. DO A TEST RUN

Take the time to test the technology, sound and camera—ask a friend to be the guest and you the host and vice versa.

2. SIGN IN EARLY

Sign in 10-15 minutes early. You will feel more comfortable when the meeting starts.

3. LOOK AT THE CAMERA

This is not easy but your clients will be more engaged if they see you looking at them.

4. LIGHTING IS IMPORTANT!

Face the window to avoid silhouetting. Ensure that once the camera is on, you are clearly seen.

5. USE THE CAMERA

It is much more engaging for both the host and guest to see and also hear each other. Body language and facial expressions are just as important as words.

BEST PRACTICES TO ENSURE ENGAGEMENT

6. USE AN AGENDA

Set expectations before the meeting. Sending an agenda in advance creates structure and order.

7. SHORTER IS BETTER

Virtual meetings tend to be more efficient and conscious of time. Shorten 1 hour meetings to 45 minutes.

8. SHOW A VISUAL

A welcome slide with the client's name will show that they have joined the right meeting. Visuals illustrating your points will keep them engaged.

9. BE DELIBERATE WHEN USING A MOUSE

Avoid moving your cursor too much on the screen as this can be distracting to the viewer.

10. USE A WHITEBOARD

Most apps have a whiteboard feature – use it. You can write notes live on it, have the agenda typed up ahead of time, etc.



BEST PRACTICES WHEN USING THE CAMERA



Even today, not everyone is comfortable in front of a camera. Consider these 12 best practices to help you feel like a natural when hosting virtual meetings before and after the camera is turned on:

Before camera is on

1. Practice. Practice. Practice
2. Record and watch yourself
3. Have a plan, not a teleprompter
4. Get hydrated and stretch
5. Be in the middle of the frame
6. Turn on the lights!

After camera is on

7. Look into the camera
8. Limit distractions
9. Posture is power
10. Be animated in the best way
11. Speak slowly and smile
12. Be natural and authentic—not perfect and scripted

Ways to use virtual meetings in client reviews

Investing in learning to use virtual technology to engage clients today may continue to pay dividends for your business in the future, even after normal life sets back in again. For instance, a virtual option may help you create scale in your service model, make it easier to connect with your clients’ non-local family members, and serve your younger clients in a format that’s more adapted to their preferences. Here are some ways to consider using virtual technology beyond the traditional client meeting now and in the future:

Host a virtual town hall

Host a virtual town hall for one of your best clients and their family, friends or co-workers. Keep it non product-oriented and aid those who may not be getting the necessary attention from their own advisor.



Host a client advisory study group

Invite a small group of top clients and key COIs to share their experience and advice with you on virtual meetings, topics of interest and best client engagement tools.



Host virtual happy hours

Staying connected and in front of your clients doesn’t always have to revolve around your business relationship. Doing something light and fun like a happy hour is human and authentic.



Host mindfulness sessions

Invite an expert to share their knowledge with your clients about non financial but relevant topics (e.g., health and fitness, homeschooling best practices).



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