

Conducting a great virtual meeting

Failing to plan is planning to fail. Never has that been as true as when it comes to virtual meetings. Luckily, a little pre-planning goes a long way to ensuring your next meeting is a hit.

Have an agenda.

If you are conducting a virtual meeting with your client, have an agenda. Include key talking points, the meeting structure, along with any relevant documents. Summarize any previous notes that you may have already discussed. If it's a new client, write out the items that you plan to cover or questions you plan to ask. Sending the agenda at least 24 hours in advance will help set guidelines and expectations to keep your meeting productive.

Ask good open ended questions.

A good example of an open ended question would be "Why did you sign up for this meeting today?" Try to avoid questions that can be answered with a simple yes or no. Use opened ended questions to get the clients talking about their situation. Examples of other open-ended questions or statements: Tell me about your current financial situation and how you would like me to help. Walk me through your current plan for retirement. Tell me how you feel about your current financial situation. How do you plan to spend down your assets in retirement?

Test the technology.

If you really want to stand out and make a good first impression, practice using your technology to make sure you provide a seamless meeting with your clients. Technology can be intimidating to some

clients, so the easier you make things flow the better. Be patient and try to anticipate any questions that the clients may have regarding the use of the technology. Test the meetings with your friends and family to get a feel for the questions that you might get from different age groups.

Foster communication.

If you are hosting a meeting with your clients, make sure you are engaged with any family members attending. Ask for their feedback and make sure you know how they feel about the topics being discussed. If you are hosting a seminar or group meeting, call on attendees or go 'around the horn' to get involvement and consensus. Also make use of collaborative tools like Google Docs and virtual whiteboarding, giving you the ability to collaborate online. Don't let distance be an obstacle. For group meetings or seminars, most virtual meeting platforms also provide options to submit questions or answers to your questions through a "chat" window or Q&A window.

It starts with you.

If you are excited about the meeting, your clients will sense that excitement. Likewise, if you're nervous, bored or unprepared, they can sense that as well. As a general rule of thumb, host meetings you'd actually like to attend!