

Virtual Meetings with Clients

Often it's not possible to meet with clients face-to-face. Leading meetings online using Zoom or another platform is a great option, but please consider the following.

Ideas

Here are a few tips to avoid some common mistakes during virtual meetings.

1. Be Organized

Being well-organized is key to running effective virtual meetings. Be sure to use your group calendar, so everyone involved knows how, when, and where to join the meeting. Also, utilize the notification option in your group calendar.

2. Test the Tech

Make sure you know exactly how to use the platform you are using for the virtual meeting. Don't wait until the just before the meeting starts.

Bonus: If you are hosting the meeting from home, try to avoid the use of your microwave during the conversation. It sounds crazy but wireless, and microwaves often operate on the same frequency, 2.4 GHz. Zoom and others will freeze while the microwave runs.

3. Stay Focused

Create an agenda that participants have agreed on and stay on track. Acknowledge each participant at the meeting. Always be sure everyone can see what you are sharing on your screen.

4. Project Yourself Professionally.

If possible, bring your webcam to eye level. Using a third party webcam is the right solution that provides more adjustability than the laptop camera can. Dress the part as well.

Also, turn off all notifications on your PC and the sound on your phone. Lastly, no multitasking.

Idea Sheets provide quick and actionable suggestions to drive more referrals and sales. Visit www.referralsafe.com/asktra frequently for new additions.