

TOP TIPS FOR AN EFFECTIVE VIRTUAL MEETING



Prepare the client.

Test the system with your client ahead of time, either with you or a team member in your office.



Prepare yourself.

For virtual meetings, it's extra important to email the agenda and any links and documents relevant to the meeting by [encrypted email](#).



Be time sensitive.

Don't let the discussion expand beyond the allotted time, but do include relationship time or small talk, the same as you would for an in-person meeting. Keep meetings to approximately 30-40 minutes maximum.



Invest in a quality web camera.

Although you can purchase a basic webcam for less than \$10, we suggest spending a little more for a good quality camera with a built-in microphone and auto focus. An HD widescreen camera with audio can be found for as little as \$40 on Amazon.



Maintain eye contact.

When you have a webcam running, remember to look into the camera and to not multi-task. Your natural tendency may be to focus on the screen, but look directly at the camera from time to time. Your client will perceive that you are making eye contact.



Slow your pace.

To make sure your client follows along, it is important to speak at a slightly slower pace than normal. If you're not using video, there won't be any visual cues to indicate your client hasn't understood something. You should also allow for a two-to-three-second delay in case of any connection issues. Keep this in mind when you ask a question, since the delay will affect your client's response time.



Follow up.

Send a formal follow-up email to summarize the meeting outcomes.



Never put the client on mute.

It will give the impression you are being evasive or are trying to hide something.