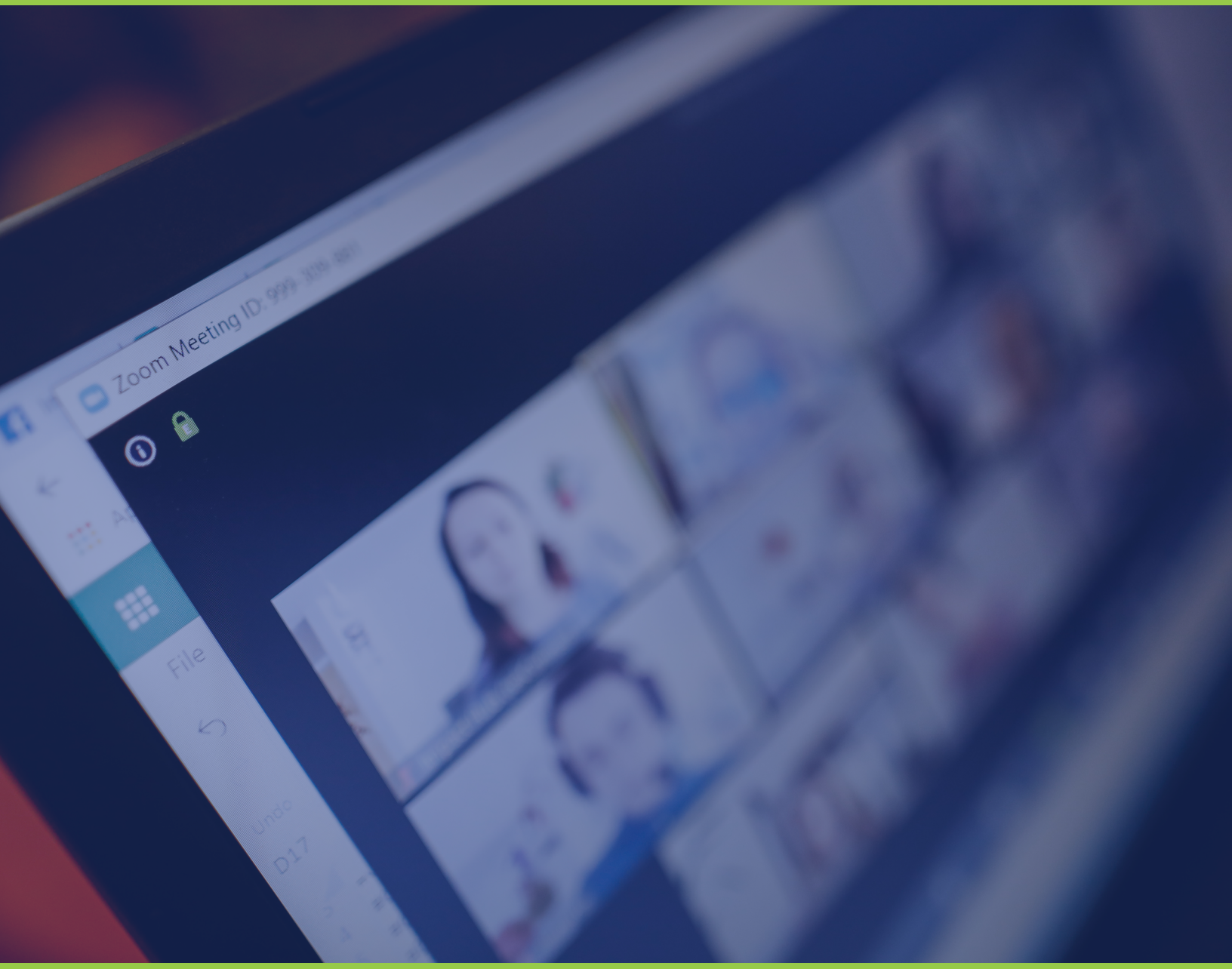


VIRTUAL SALES RAPID TRANSITION PROGRAM

VIRTUAL MEETING TIPS

convergo

VIRTUAL SALES RAPID TRANSITION PROGRAM

VIRTUAL MEETING TIPS

Video Conferencing Tools Tips

- **Be aware of managing audio and the mute button**
- **Be aware of the different view options available and understand each**
- **Ensure you are able to share presentations, demos, or anything you need to show**
- **Ensure you can switch between sharing and using all of the cameras for better interaction**
- **Record the meeting for reference and sharing with the client as needed**
- **Be familiar with the platform so that you can troubleshoot challenges that your client may have like:**
    - Using the mute button
    - Ensuring the Video Conferencing App is in the front window

Presentation Tools Tips

Remember: Slides should not make much sense without you driving the points. Keep the slides simple and deliver the message.

- **Text tips:**
    - Use large text
    - 6 x 6 Rule: No more than 6 bullets per page, no more than 6 words per bullet
    - Use dark text on a light background
    - Use empty space around text
    - Check spelling and grammar

- **Design and Graphics**
    - Keep it simple
    - Only use imagery if it enhances your message
    - Don’t over-animate
    - LImit the number of colors that you use
    - When presenting, use the presenter view
    - All discussions are not linear. Know how to move forward and back in your presentation effectively.
    - Use your mouse to draw attention
    - Summarize key points before moving on to the next

Preparation Tips

- **Invitation setup**
  - Make it easy for clients to attend:
    - Generate a call number and meeting link
    - Include in the invitation
    - Send setup reminders

- **Over communicate your agenda and logistics**

- **Prepare your environment:**
  - Ensure you are positioned well in front of your camera
  - Make sure the space behind you that is in camera view looks professional

- **Remove anything that might distract your clients:**
  - Turn Notifications off on your computer and cell phone
  - Optmize your screens
  - Hide your bookmarks and personal information
  - Let the dog out

- **Prepare to engage**
  - Encourage your clients to test the meeting link prior, prepare to use their camera, and arrive a few minutes early
  - Arrive early yourself and use the opportunity to build rapport
  - Practice using the technology with your team members

Platform Resources

Zoom
Help Center
Video Tutorials
Recorded Training Sessions

Webex
Help Center
Video Tutorials
Online Classes

GoTo Meeting
Help Center
Getting Started
Recorded Training Sessions

MS Teams
Help Center
Training Videos