Video Conferencing – Checklist

Before the meeting

- ☐ If applicable, send your client an application, presentation, or any other documents you may share with them in your meeting ahead of time.
- ☐ Include contingency plan options in case of bad connection or software issues.
- ☐ Text or email your client the day of your meeting to confirm your video conference, time, and platform. Be sure to confirm who will be calling who.
- ☐ Ensure you review all necessary setup procedures, which will differ depending on the platform you use. For example, the platform may require you to email a link or meeting invite to your client ahead of the meeting.

During the meeting

- ☐ Remember you are on camera! If you are new to video conferencing/meetings, this can be easy to forget. Ensure your client can hear and see you appropriately before beginning the conversation.
- ☐ Keep eye contact.
- ☐ Limit fidgeting.
- ☐ Speak extra clearly – spotty internet connections can result in difficult-to-understand audio.
- ☐ Be sure to periodically pause and ask if your client has any questions.

After the meeting

- ☐ Text or email your client thanking them for their time.
- ☐ Ask for comments on platform, and if they have any suggestions for ways you can improve calls in the future.
- ☐ Remember to send any requested information or items that came up during the meeting.

Need ideas for sales strategies to use with your clients? Call us!

(800) 437-7355. Life: ext. 775, DI: ext. 719, Worksite: ext. 782

Illinois Mutual®
Life Insurance Company

A7141 (7/20)