



A FINANCIAL ADVISOR'S GUIDE TO **VIRTUAL MEETINGS**

GETTING STARTED – PSYCHOLOGY AND TOOLS

The line between business and personal is blurred. During virtual meetings, we see the inside of people's homes. We see babies, dogs and personal photos. And since things look different than a typical office setting, it's important to be understanding and empathetic.

Listen for ways to add value. Some of those ways to help may have nothing to do with your products and services.

How to lay the groundwork for a virtual meeting

- Connect with prospects and clients via email or a phone call.
- Ask them how they're doing in business and at home.
- Let them share whatever is on their minds.
- Share your availability for virtual meetings to discuss their specific investment needs.

Tools you'll need for your virtual meeting

- **Camera:** If the camera on your device is not putting out sharp images, invest in an HD or 4K webcam.
- **Microphone:** A plug-in external microphone will give you better sound than the built-in mic on your computer.
- **Lighting:** Face the brightest window in the room or invest in a ring light.
- **Background:** Tidy and rearrange your room. Do not use virtual backgrounds. Consider a 5' x 7' backdrop.

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