

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



## **SCHEDULING VIRTUAL MEETINGS**

Empower clients to schedule virtual meetings by informing them of their options. Your contacts may not know you offer virtual meetings; don't assume they do.

### **Announce the opportunity**

- If your firm allows, include a link in your email signature and on relevant webpages that allows clients to schedule a meeting with you automatically.
- Announce that you're currently taking virtual appointments by email request on your communication channels.
- If you're open to giving group presentation sessions, make that known as well.

### **Stay secure**

- For security reasons, it's best not to use one general link for all of your web conferencing. Instead, set up your virtual meeting platform so that it creates a new link for each meeting.
- If your platform can assign passwords, choose that option for an extra layer of protection.

### **Schedule a meeting**

- Do not send the email invitation generated through the web conferencing platform. Instead, send attendees an email in simple terms with one link and one phone number.
- Encourage your clients to download the virtual meeting app.
- Email the client at least 24 hours ahead of time, reminding them to join early and to download the app prior to the meeting.
- At every stage, recap your client's next step – don't assume they already know.

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