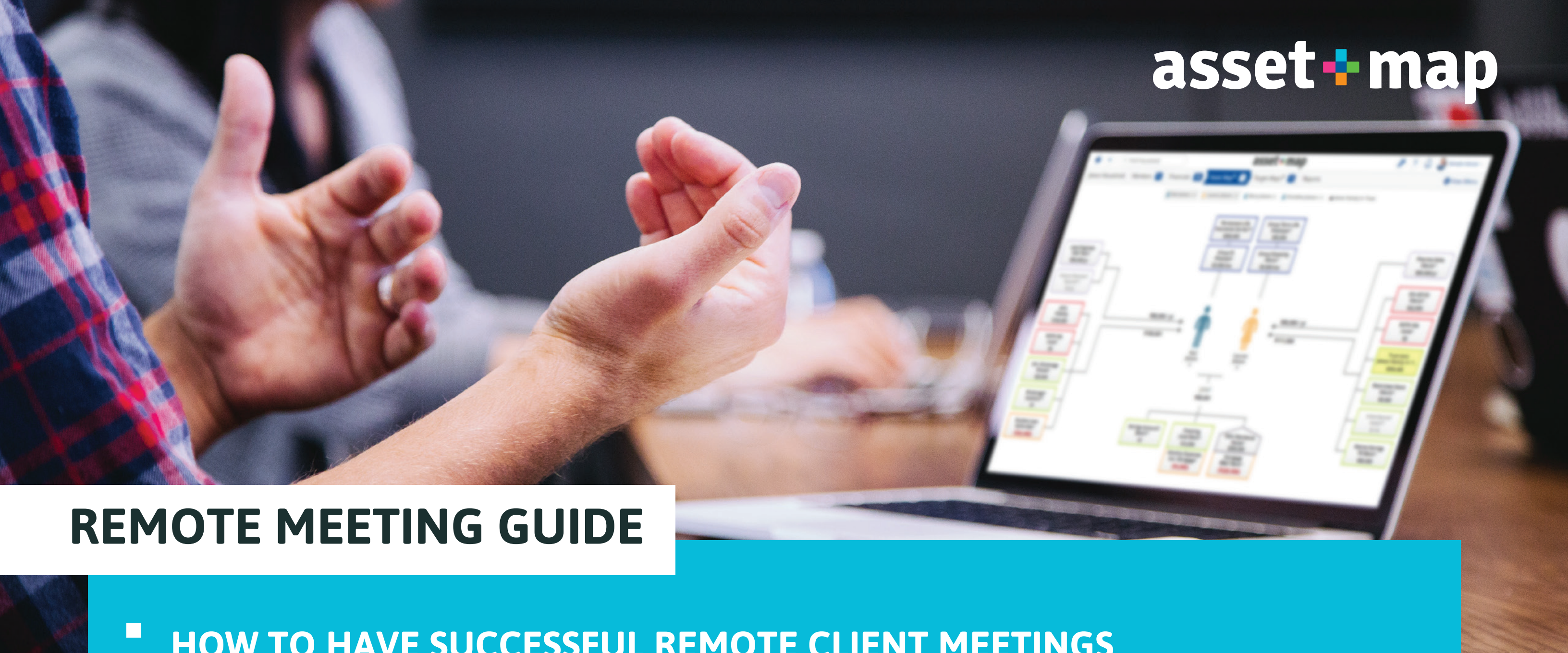

REMOTE MEETING GUIDE

- **HOW TO HAVE SUCCESSFUL REMOTE CLIENT MEETINGS**
- **WHAT TO DO BEFORE, DURING, AND AFTER A REMOTE CLIENT MEETING**

In today's mobile business environment, meetings can happen anywhere. As relationships span longer distances, financial advisors can use remote meetings and video conferences to reach more clients, deepen relationships and save time.

BEFORE THE MEETING

1. Choose your remote meeting service and familiarize yourself with its tools.
   Zoom | GoToMeeting | UberConference | WebEx | Skype |
2. Review your client's Asset-Map and Target-Maps to set your meeting's agenda.
   Have a copy of the Asset-Map PDF downloaded in case screen sharing is interrupted.
3. Practice your delivery and get comfortable with being on camera.
4. Organize your workspace and remove distractions from your camera's field of view.
5. Make sure you send your client the meeting link.
6. Test the software with a colleague and make sure you are comfortable using it during the meeting.
7. Disable pop-ups/alerts for other programs - remember, your client will be able to see everything on your screen.

84%
of people prefer remote meetings [1]

1. https://www.virgin.com/entrepreneur/infographic-the-importance-of-face-to-face-networking

DURING THE MEETING

1 Mute your mobile phone and find a quiet conference room where you won’t be interrupted by a co-worker.

2 Check to make sure your client can hear and see you with clarity.

3 Explain the agenda for the meeting so your clients know what to expect.

4 Maintain eye contact with the camera as if you are speaking to a client across the table from you.

5 Have a notebook handy so you can take notes that you can't on screen

6 Slow down! If you move your mouse too quickly (like many folks do), it can be hard for your client to follow.

A webcam is always or sometimes used in

72%

of remote meetings [1]

AFTER THE MEETING

1 Update your client’s Asset-Map and Target-Maps with their new information if you didn’t already save them during your meeting.

2 Solicit client feedback so you understand their view on what went well and what didn’t.

3 Follow up with your client on action items from the meeting and establish who’s responsible for each one.

64%

of advisory firms use enterprise video conferencing software [3]

Help your clients make meaningful financial decisions—from anywhere.

Call or email us today to see how you can use Asset-Map in your remote meetings to improve your conversations with clients and help them visualize their financial possibilities.

www.asset-map.com | sales@asset-map.com | Tel: 888-664-8850

2. https://www.strategyr.com/MarketResearch/Web_Conferencing_Market_Trends.asp
3. https://www.investmentnews.com/article/20180512/FREE/180519990/financial-advisers-embrace-virtual-offices