



INVESTNET

Video and Webinar Best Practices

During this unprecedented time, we recognize many of you are connecting with your clients virtually. Here are some tips and tricks to help you stay connected.



VIDEO EXPERIENCE & PROCESS

- Test and retest the video process. Try performing video meetings internally first to test the technology. Test eye position, posture, distance from video camera, lighting in your office/room, etc.
- Make sure your internet speed is good. Test this by looking at your webcam and counting to three with your fingers. Doing this allows you to confirm your words and hand gestures are in real time.
- If you have to use two screens and need one screen on the side, explain that at the beginning of the meeting. If you do not, it may distract clients as they wonder what you are looking at or why you are not making eye contact.
- Laptop camera for video is acceptable. If available, you might consider hooking up a webcam for improved quality and experience.



PREPARATION SKILLS & APPEARANCE

- Rehearse your first set of meetings. Use Webex to record the meeting and playback for review before going prime time with clients.
- Smile throughout the meeting. It goes a long way.
- Keep your background as professional and mindful of your home surroundings (children, barking dogs, etc.)
- When doing a video conference, you may fall into the trap of looking at the face of the client on the other end of the video. You will come across as if you are looking down toward the keyboard or bottom of the screen. Work to keep your eyes on the location of your video camera (usually top of your screen). Place a sticky note if need be.
- Present as if you were in person. Use hand gestures, body language, etc. to deliver messages and points of emphasis.
- If you're not comfortable using video, it's ok. Use Webex presentation mode to follow a slide or demo to present. This doesn't replace in person, but it's the closest thing we have for now. It's likely a learning experience for both of you.
- Dress well. Solid colors are best if using video.
- Use the Webex video and call-in number with a headset if you have one available.
- If presenting to a group, you may want to have pre-determined questions set up to anticipate Q&A.



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