

Communicate with Purpose

Tips for Conducting Exceptional Virtual Meetings

Virtual meetings are becoming the norm and now, more than ever, conducting them successfully is vital.

Exceptional Virtual Meetings

Not only have remote meetings become the norm, but, given recent events, a great alternative to in person office meetings. Additionally, the below should be considered when meeting with remote or 'stay-at-home' employees who need to remain engaged with other team members. Many advisors find the biggest challenge of virtual meetings is keeping attendees engaged and interested given that you can't always clearly see and hear everyone, unlike face-to-face interactions.

So how can we make virtual meetings just as engaging and productive as in person meetings? Do the same set of rules that apply to face-to-face meetings apply to online meetings to make them work, or do we need something different? Let's take a closer look at some ideas that could help to improve the virtual experiences you provide to clients and/or staff.

Use Collaborative Software

Choose any good software from the abundant options available (WebEx, Zoom, GoToMeeting, Adobe Connect, and Skype for Business). These software solutions manage conversations, ensures that everyone is on the same page, lets participants raise hands or ask questions, and will record comments and messages to help everyone follow the conversation.

Test the Technology Ahead of Time

Nothing kills momentum at the start of a meeting like a 15-minute delay because attendees need to download software or there are struggles with screen sharing, etc. Prior to a virtual meeting, all participants should test the technology and make sure they are comfortable with the major features. And if there are common areas of confusion, be sure to share that with attendees in the meeting link invitation – prior to the start of the meeting.

Integrate Video

To make attendees feel like they're all at the "same" meeting, use video conferencing rather than a traditional conference dial-in number. Technology — such as Zoom, Skype, and GoToMeeting — helps to personalize the conversation and keep participants focused and engaged. **That being said, always provide your attendees a choice.** Video conferencing can work very well, but it relies on a strong internet connection that may not always be available. Attendees should have the ability to participate via audio but make it clear that video-first is the new norm.

Tips for Managing Meetings with Multiple Attendees

For those meetings with multiple attendees, trying to engage everyone to participate without talking over each other is one of the more challenging aspects of running a virtual meeting. To prevent this, we recommend periodically calling on specific individuals to share their thoughts, by virtually "going around the table" to gain insights. Certain software packages even allow attendees to "raise a hand." This allows all attendees the opportunity to contribute without overwhelming the audio lines.

Have a Well-Defined Agenda in Place

Coordinating attendees for an online meeting can be a lot of effort, so it is ideal not to waste any more time during the actual meeting. If you have a pre-planned and well-defined agenda in place, chances are that attendees will be more engaged. Share the agenda with others ahead of time, in the meeting invitation, so that everyone knows what they are expected to contribute and can prepare accordingly.

Start with an Icebreaker

An icebreaker is a great medium to break the initial ice between participants and create a positive atmosphere at the onset. It lightens up the mood and breaks any social barriers, leaving attendees with a greater willingness to contribute. Icebreakers can be in the form of questions, trivia, or something as fun as a virtual game. In fact, almost any icebreaker you do in a face-to-face meeting can also be carried out in online meetings.

Introduce Everyone

This is probably the simplest trick of the lot. Introduce everyone attending the meeting. Include pictures of attendees on the wall if video is not being used. It personalizes the voice that other participants hear, making them more willing to indulge in a discussion.

Avoid Static PowerPoints

Nobody enjoys a flat, slide-turner PowerPoint presentation. PowerPoints need to be exciting, engaging, and fun, especially when used in online meetings. Think about using the right animations and impactful visuals. Insert interactions wherever necessary. You could also use PowerPoint add-ins available in the market to help you create extraordinary presentations.

Make Small Talk

Small talk helps feel people connected. A passing mention about the weather at your place or a joke that gets everyone laughing is good enough to get participants going. These breathers work as quick mental breaks and let participants feel at ease with the whole setting.

Watch the Time

Don't drain attendee attention spans with extra-long meetings. Anywhere between 30 to 60 minutes is a good duration to follow when conducting a meeting.

Send Meeting Notes that Work

Notes from your meetings are very important, however, they should be short and to the point. Use bullet points to summarize key information and, if possible or allowable, record the meeting and send a link to that recording to the participants.

Review Your Meeting

Last but not least; review your own meeting once it is over. Ask the attendees which parts or moments they liked best and which ones least. Was there something that could have been skipped or included to make the meeting better? Encourage them to provide honest feedback so that you could improve the quality of your further meetings.

Contact your [AssetMark Business Consultant](#) or call **844-540-0972** for more information.

AssetMark, Inc.

1655 Grant Street
10th Floor
Concord, CA 94520-2445
800-664-5345

IMPORTANT INFORMATION

AssetMark, Inc. is an investment management and consulting firm that helps independent financial advisors build great businesses. This is for informational purposes only, is not a solicitation, and should not be considered investment or tax advice. This information has been drawn from sources believed to be reliable, but its accuracy is not guaranteed, and is subject to change.

AssetMark, Inc. is an investment adviser registered with the U.S. Securities and Exchange Commission.
©2020 AssetMark, Inc. All rights reserved.

83590 | M20-84916 | 03/2020 | EXP 03/31/2021