COMMUNICATE WITH PURPOSE

Virtual Meeting Checklist

- [ ] **Create an agenda for your meeting**
  Even if only for you to follow to keep you on track for the items to cover during the call.

- [ ] **Evaluate your background and appearance on camera**
  Turn on your camera and determine if the way you look and what's behind you [on camera] is the optimal presentation of yourself. Note the camera angle and how your face shows up in the client's view.

- [ ] **Open all the resources you want to reference on the call**
  And close all other applications/resources, etc. You don't want to accidently share another client report, have email or text notices coming into the screen or any other unrelated items to appear during your call.

- [ ] **Practice with a trusted partner a few times**
  We highly recommend testing out Zoom (or the software of your choice) with your staff to get an idea of how the product works, as well as to gain insight into the client's point of view. Also, try the experience with various web browsers [Safari, Firefox, Chrome, etc.] and let your clients know in advance if the conferencing service is not available on a mobile phone or tablet. Be cognizant of how often you move the cursor around the screen and scrolling up and down a page, moving rapidly can disorient your viewer.

- [ ] **Be prepared to provide tech support to your clients**
  While most video/web conferencing tools are intuitive today, they may be foreign to your clients. As you practice the first few times with a trusted partner, note the experience your partner has as he/she joins you online. Your tech support will likely not be heavy lifting, it will be walking new users through what to click, etc.

AssetMark, Inc.

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

93168 | M20-18267 | 04/2020 | EXP 04/30/2021