**Virtual Review Meeting Checklist**

|  |  |  |
| --- | --- | --- |
| **Step** | **Review Meeting Activity** | **Completed on:** |
| 1 | Review the list of clients prompted for **Virtual Review Meetings**  | Day 1 |
| 2 | Schedule the **Virtual Review Meeting** with the Client  | Day 2 |
| 3 | Add **Virtual Review Meeting** to your Calendar | Day 2 |
| 4 | Send **Virtual Review Meeting** Confirmation Email to client along with details on how to access the Virtual Meeting. **Note**: First time users may need assistance with technology set up.  | Day 2 |
| 5 | **Virtual Review Meeting** Preparation:* Virtual Review Meeting Agenda
* Account Administration – Forms requiring updating
* Investment Management - Portfolio Summaries
* FORM Information Summary & OTHER
 |  |
| 6 | Confirm **Virtual Review Meeting** via phone with Client and confirm they have the technology ready to go. **Note**: First time users should be requested to log on 5 to 10 minutes ahead of scheduled Meeting time to ensure their technology is set up properly (i.e. trouble-shooting).  | Day before Review |
| 7 | Re-Send **Virtual Review Meeting** dial in and log in details. | Day before Review |
| 8 | **VIRTUAL REVIEW MEETING** with AgendaLog In 5 minutes ahead of time & then Dial In on timeFollow Virtual Meeting Checklist (see next page) | Day of Review |
| 9 | Maximizer: Click “Review Meeting” as complete  | Same/Next Day  |
| 10 | Maximizer: Add related notes and/or upload related files  | Same/Next Day |
| 11 | Debrief **Virtual Review Meeting** & Set Follow Up Items  | Same/Next Day  |
| 12 | Maximizer: Trigger all follow up activities accordingly | Same/Next Day |
| 13 | Maximizer: Check next **Virtual Review Meeting** prompt setEnsure Meeting Preference is noted: In-Person, Virtual, Phone. | Same/Next Day |
| 14 | Account Administration Follow Up If paperwork was updated on the virtual meeting, send via email for cyber signature and/or mail out hardcopy and set follow up. | Within 1 week |
| 15 | Investment Management Follow Up | Within 1 week |
| 16 | Financial Planning & Lending Follow Up  | Within 1 week |
| 17 | Ensure all client promises are delivered on  | Varies |

**VIRTUAL REVIEW MEETING SET-UP CHECKLIST**

Depending on how experienced you are with Virtual Meetings and the necessary set up, you may want to begin the Getting Ready process 15 minutes prior to Meeting Start time.

It is also recommended you are logged on Virtually 5 minutes before the call start to ensure clients who are also trying to set up and be on time can do so. You can have them waiting in the ‘Lobby’ until official start time if you like or be there to greet them a few minutes early – which is good idea for first time technology users.

GETTING READY

* Forward your phone lines and shut your office door to avoid unnecessary interruptions.
* Close all unnecessary programs on your PC and/or anything that may reveal private or confidential information which does not belong to the client attending the meeting (especially pop-ups from Outlook, Skype, IM, etc.).
* Have all items you wish to share on screen during the Review Meeting open and ready to go (minimized).

VISUAL CHECK

* Set up the screen or window you do want to share – check audience view to ensure they are seeing what you believe they are.
* Know how to ‘freeze’ or ‘pause’ the screen to allow you to shift items being viewed without looking unprofessional or unorganized to the client (alternately use 2 screens and have one as your ‘showing screen’ and the other as your ‘private working screen’).
* If you are also using a PC camera and will be visible by the client at any portion during the meeting, check to see your placement on the screen is appropriate (i.e. none of your head or face is cut off on the screen).
* If you are using a PC camera and will be visible, it’s also important you are dressed professionally – this is especially important and ties directly to your branding.

AUDIO CHECK

* Most programs have the option to log into audio via phone or PC – and in many cases the phone quality is better. The PC audio does not allow the mute feature as easily as the phone (if at all) should you suddenly need it AND it sometimes produces an annoying echo to the voices.
* Test the sound quality at the beginning of the call and make changes as required – it is very distracting to participate in a call where you can’t properly hear the other person.

SHOW TIME – GO TIME

* Always start the call on time, warmly greet the client, and then make sure the person you are meeting with can see and hear just as well as you can before you officially begin.
* From here, run your meeting as you normally would – well organized, professional, engaging the client, and fully incorporating family, occupation, and recreation to build chemistry.