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Conducting effective virtual meetings

Running effective virtual meetings requires foresight and planning. The goal is to have clear objectives and to keep people engaged and involved in the conversation. Following are some reminders and best practices to assist you with the planning process.

The agenda

- Know your audience, do research, and be prepared with relevant information, especially for prospects or new clients.
- Have a clear agenda with a specific goal for the meeting; don't try to cover too much in one meeting.
- Identify a discussion leader for each topic on your agenda. Make sure they are informed well in advance to allow them time to prepare for the meeting.
- For internal staff meetings and to keep everyone engaged, assign roles to others, and rotate among staff (leader, note taker, producer/technology solver, facilitator/timekeeper, presenter, etc.). Give others the chance to present and everyone a heads-up on their roles.
- Share the agenda, meeting objectives, and materials or pre-work in advance—this allows people to prepare for the meeting.

Technology and tools

- Use multiple channels to communicate (video, email, text, IM, phone, etc.) and leverage the right tool for the meeting size and purpose (1:1, group meetings, etc.). As a rule, don't conduct video meetings from your smartphone and only use channels that are compliant with your firm's policies. Consider checking with compliance and legal counsel to advise of any risks associated with methods of communication.
- If you need face time, use video. But, keep in mind overuse of video can be exhausting. Video fatigue is a real thing!
- Provide step-by-step instructions on how to join the meeting and, if necessary, how to download any software in advance. This will mitigate time wasted on technology issues.
- Test the technology prior to the meeting and adjust your settings:
  - For video—Place webcam at eye level, check audio, have good lighting, and consider your background. Look at how you are framed in the video window and elevate your laptop if needed (with books or a shoebox, etc.).
  - For audio—Decide in advance the best quality sound (computer or external microphone, headphones, cell phone, etc.). If using video, laptop microphones tend to work best vs. a cell phone.

Your workspace

- Consider your space and surroundings:
  - Choose a quiet space, but remember empty rooms can echo during audio conferences (carpeted rooms or a rug can reduce sound issues).
  - For video, consider your backdrop. Avoid cluttered or busy backgrounds. Don't let your surroundings distract from the conversation. And, be sure to have good lighting. Bright light lifts the mood and allows participants to see you better.

Note: As always, you'll want to be mindful that virtual communications with clients are appropriate from a compliance and record retention perspective.

- Plan for distractions—Select a space where you can focus. Family members and pets love to make cameos, so close (or even lock) the door if you don't want them to attend the meeting. If there is a disruption, go with it; it can add humanity to the experience. If a client has a distraction, use your discretion on whether to say anything and let them handle the situation.

Your appearance

- Dress accordingly—You know your audience and what is appropriate. Your appearance will set the tone for the meeting, so choose what works best. For clients, you may want to dress professionally as you would in a face-to-face meeting. For staff meetings, dress may be more casual.
- Be yourself—This is an opportunity to be real and show who you are in your home environment. Relax, be conversational, and enjoy the time spent with your clients or staff.
- Face toward your primary light source, ideally a window. Position yourself so there are no windows behind you. Turn off any lamps visible in your background.
- Position yourself approximately 18–24 inches from your camera and adjust the camera so it is at eye level.

During the meeting

- Welcome everyone, take roll call, and make introductions for new clients or staff (if applicable).
- State your objectives at the beginning so everyone is aware of the desired end result.
- Stay on track with the agenda topics and timing.
- Foster an environment of collaboration; give everyone a chance to participate, encourage feedback, and acknowledge new ideas.
- End with open discussion and questions. Ask if everyone got what they needed from the meeting.
- Debrief on outcomes and confirm next steps/action items.

Follow-up

- Send follow-up communications in a timely manner:
  - Recap outcomes.
  - Address outstanding items.
  - Review new action items.
- Remember to provide the best way and times to contact you.
- Schedule additional meetings as needed.

For more insights and actionable tools, visit Talent Resource Center:

advisorservices.schwab.com/managing-your-business/talent-resource-center

For more professional video delivery (meetings, client podcasts, or video tutorials), you may wish to create a DIY studio. Inexpensive equipment options are available online, easy to set up, and will elevate your game:

Webcams for video conferencing or webinars provide high-definition video and clear images.

Microphones have an enormous impact and provide a dramatic increase in sound quality.

Lighting is important, ideally via a window—but not behind you. Turn off any lamps visible in your background. Alternatively, ring lights are a great, easy option for studio lighting, and they're remarkably user friendly.

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