

8 BEST PRACTICES FOR EFFECTIVE VIRTUAL 1:1 MEETINGS

Create meaningful connections with your Clients through virtual meetings

1. Test the technology.
2. Choose a private, distraction-free environment.
3. Dress to impress.
4. Look directly into the camera.
5. Brief your Client on the process.
6. Speak clearly and keep movements to a minimum.
7. Mute your mic when not speaking.
8. Follow your regular meeting structure.



For more ideas on how advisors can grow their business, visit sunlife.ca/advisorbestpractices

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