

CHOOSING A VIRTUAL MEETING PLATFORM

Consider these four attributes to pick the best platform for your practice

COST



- What is your budget?
- How much can you redirect from travel expenses?
- What is the cost vs benefit?

FUNCTIONALITY



- Recording
- Screen-sharing
- Annotating
- File-sharing
- Mobile/desktop

CLIENTS' PREFERENCES



- Do your Clients already keep in touch with family digitally?
- Are your Clients tech-saavy or do they need something straightforward?

SYSTEM INTEGRATION



- How do you plan to use it?
- Does it need to integrate into your CRM?
- Can you use it to schedule meetings and integrate with your calendar?

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

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