ANNUITY GENERAL

VIRTUAL APPOINTMENT
BEST PRACTICES

After completing $100 million in virtual appointments per year, we have found the following items and best practices to be a success.

ADVISOR TOOLS & TIPS

1. LAPTOP OR COMPUTER
You will need a laptop or desktop computer to make your call. This allows you to have a stable image and take notes. Phone appointments are okay and some advisros are successful over the phone, however using laptops or computers for virtual meetings are preferred.

2. INTERNET CONNECTION
Use a wired internet connection, if possible. A wired connection is less prone to interruptions, so try to use an ethernet cable instead of wi fi whenever you can. You don't want a meeting to drop in the middle of your appointment.

3. WEBCAM
Use a webcam to video conference, rather than a simple phone call. Set-up your camera at eye-level to maintain eye contact with your prospect and stay engaged during appointment. Position yourself so that you can be seen from the shoulders to the head, anything closer may be overwhelming.

4. MICROPHONE AND SPEAKERS
Just as important as being seen is being heard clearly. Almost any plug-in device—a desktop USB mic or speakers, a USB headset or wireless headset or speakers will sound better than the built-in microphone and speakers on a laptop or computer. Most laptops and computer have mics and speakers. You need to become familiar with your equipment and understand to adjust the settings.
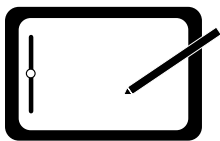
5. DIGITAL NOTEPAD / TABLET
Draw and write your notes alongside your meeting or presentation and share in real-time. This gives you the power to put youre live visual notes on screen at any time. Here are a few recommendations.

Zoook DigiPad	XP-Pen Tablet	iPad	Stylus	Amazon's Best Sellers

6. PRESENTATION
Craft a detailed agenda with time allotted for various topics, and focus on what's important. State the objectives and goals, and why you are meeting. A successful virtual meeting requires a lot more upfront preparation. An agenda of topics or subject areas that need to be covered can help keep the session on point. We recommend **Power Point**, **Google Slides** or **Apple Keynote**.

Power Point	Google Slides	Apple Keynote

7. ONLINE VIRTUAL MEETING SOFTWARE
This software facilitates digital meetings which are the basis for a virtual-advising relationship. Try **Google Hangouts**, **FaceTime**, **Skype**, **GoToMeeting**, **Zoom**, or **JoinMe**. You can use any software you are familiar with. Always provide an audio dial-in option.

Google Hangouts	FaceTime	Skype	GoToMeeting	Zoom	JoinMe

Contact us **today** to get started **(800) 930-7113**
or visit **www.virtualmeetingsnow.com** • Email: **info@annuitygeneral.com**

ADVISOR TOOLS & TIPS

8. TEST OUT ALL YOUR EQUIPMENT BEFORE YOU START
While you can't completely avoid technical issues from occurring, you can reduce the likelihood of technical surprises by taking the time to test your web conferencing application well in advance of your virtual meeting.

9. PROFESSIONAL DRESS
Make sure you're dressed professionally. Men are recommended to wear a tie, clean haircut, and be cleanly shavin. *(Please remember to iron your clothes.)* Presenting a professional appearance will reinforce the virtual appointment, and is just as professional as an interaction as if you had visited the prospect at their home.
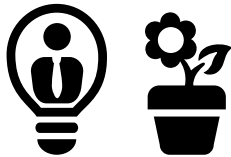
10. ADJUST THE LIGHTING & BACKGROUND
Before you start a virtual appointment, test out the lighting. Is your image clear? Is the picture too fuzzy and dark? Try turning on overhead lights and blocking light from windows, which can lead to too much background light in the video. You should also avoid a web-call background that is too personal, or too sterile. A bookcase or lightly adorned shelves work, as do houseplants.

PROSPECT TOOLS

1. SCANNING
This software facilitates digital scanning of filled out documents.
Try **Tiny Scanner** or **CamScanner**. (*some carriers require a wet signature*)

Tiny Scanner   **CamScanner**

2. DIGITAL SIGNATURE SOFTWARE
Lets your clients sign paperwork from anywhere. Electronic signature software lets clients and prospects sign documents virtually. An electronic signature tool can streamline your account opening process, leading to higher client satisfaction.
We recommend **DocuSign**, **HelloSign**, **RightSignature**.

DocuSign   **HelloSign**   **RightSignature**

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