

Virtual meeting hosting guide

North American Company for Life and Health Insurance®

Life



Maintain and strengthen client relationships with virtual meetings

It's always been important to stay in touch with your clients. One great way to maintain and potentially strengthen your relationships with your clients is through virtual meetings. This guide is meant to provide you with some best practices when it comes to hosting virtual meetings.

Choosing the right technology

There are several platforms available to host a virtual meeting. A simple online search will yield a slew of results, but GoToMeeting, Zoom, and Join.me are some of the most popular. Some platforms offer free trials, and some charge for their services, so be sure to do your research before selecting the one that best suits your needs and budget.

Most platforms will support video conferencing, and to use that feature, you'll need a webcam. Most newer laptops have a built-in webcam, or you can use an external webcam that plugs into your laptop's USB port. If you don't have either and still want to video conference, you may be able to use the camera in your cell phone. We recommend turning your video on so the clients can see your face, but if you're camera shy, you can rely on audio and a slide deck (like Microsoft PowerPoint™).



Popular virtual meeting platforms

- **GoToMeeting**
- **Zoom**
- **Join.me**



Inviting attendees

Most platforms will help you set a time and duration for your meeting, and then give you an easy way to invite attendees, such as a link or login code. When inviting attendees, you could start with your current book of business, then work your way through email and social media contacts.

When crafting your invitation, think about your personal experience with registering for webinars and virtual meetings – what would an invite look like that would get you interested in attending? Include a snapshot of what information you'll provide during the meeting. It can help to pose a question in your invite that may intrigue them to attend to learn the answer.

One popular way to encourage attendance is by offering an incentive (PDF on relevant information, video link, coupon code, etc.) to anyone who attends.

Don't get discouraged when you start your virtual meeting and see that you don't have as many attendees as you had registered. The average live webinar attendance rate is 35%¹.



Like the old adage goes, “Plan your work, then work your plan.” The most beneficial virtual meetings have an agenda. Plan out how the meeting will be structured and consider including:



Introductions and housekeeping – Introduce yourself, your business, and any guest panelists you have joining you. Cover housekeeping items like how to submit questions using the platform. Go over the meeting agenda so your attendees know what to expect.



Engagement – Keep attendees engaged with your content through polls, chats, videos, and screen sharing.



Call-to-action – A meeting is only as strong as its call-to-action, so it can help to start with what you hope your attendees will do next, and then work your way backward through the content you want to deliver. Have a clear, concise call-to-action at the end of the meeting. For example, if your call-to-action is “Schedule a one-on-one appointment,” start there, then plan out what it would take to get them to take that next step.



Q&A – Most platforms will allow attendees to submit questions throughout the meeting using a chat feature. A live Q&A session gives you a chance to interact with your attendees on a more personal level and help you better understand their needs.



Giveaways – You can often attach or send helpful files through the video dashboard as a “thank you” for attending.



52 minutes
average webinar
view time¹

Being a good host

When hosting a virtual meeting, make sure your content is compelling and adds value. Remember, you want them to act on this meeting afterwards, so give them something to act on.

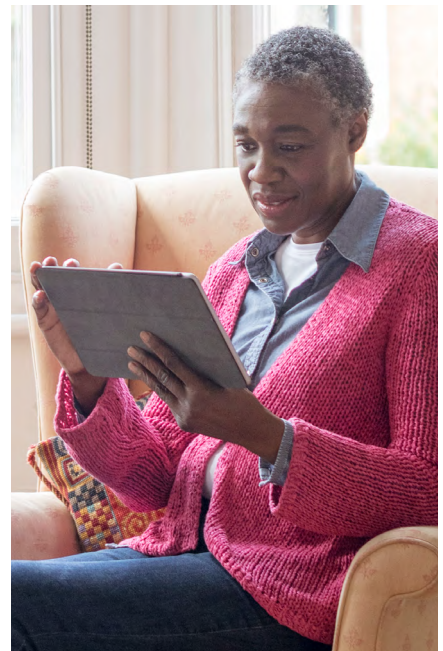
Even though the meeting is virtual, you should still respect your attendee's time.

Remember, less is more when it comes to your slide deck or presentation. Don't cram each slide with blocks of text. You want your attendees focused on what you're saying, instead of reading their screen. Instead, use relevant images, eye-popping infographics, and even simple charts to help illustrate your main points.

Follow-up

The most overlooked part of any virtual meeting or presentation is the follow-up. We suggest emailing your attendees copies of any white papers, helpful websites, or materials used during your meeting within 24 hours. It might also be beneficial to email those who registered but did not attend your meeting. Some platforms allow you to create a recording of your meeting, allowing you to send the recording to all your registrants, or even share via email or social media.

Whichever platform you use, and however you choose to run your virtual meetings, remember there will be a learning curve. Even the most experienced presenters run into technical issues or even get nerves from time to time. The important thing is to stick with it and make small adjustments as you go. We bet you'll be having great virtual meetings in no time.



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1. 2022 On24 Webinar Benchmarks Report, <https://www.on24.com/resources/asset/ebook-on24-webinar-benchmarks-report-2022/>

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