

TOP TIPS

FOR VIDEO CONFERENCING AND SCREEN SHARING

NOW IS THE TIME

- You should contact existing clients to reassure them of the choices they made when purchasing life insurance; they bought life insurance for uncertain times
- People are at home now and easier to reach
 - Keep in mind mornings may be tough. Some parents are getting their kids situated for homeschool
 - As homeschooling may require help from parents at various times throughout the day, confirm it's a good time before beginning the meeting
- Finances are on everyone's mind
 - Clients may be looking for ways to reduce unnecessary expenses. Remind them of the necessity of life insurance

PHONE APPOINTMENTS

- Listen for cues you would have picked-up during a face-to-face meeting that will help you personalize the conversation (dog barking, kids talking, etc.). Determine where they are during the call whether home, car or elsewhere
- Ask questions on a regular basis to check-in with the client – avoid talking at length without taking breaks; this ensures the client is still with you
- Email documents ahead of time – but not too far in advance as the message could get lost in their inbox. This especially applies to more complicated documents as it could curb their interest in the meeting
- Order the attachments intentionally, with general information at the beginning and more detailed illustrations at the end
- Be clear, and direct clients to specific page(s) during the call

VIDEO CONFERENCING/SCREEN SHARING

- Control what clients are viewing and guide them through the presentation to avoid the temptation to skip ahead
- Close any desktop windows ahead of screen-sharing, so that you do not inadvertently share personal information
- Open documents ahead of time that you plan to share with the client so that you are not searching for them during the call



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