

FROM OBSTACLE TO ADVANTAGE:

MAKING THE DIGITAL MEETING
PLACE WORK FOR YOU



OVERVIEW

Covid19 has created a business environment like no other.

Face-to-face meetings have been replaced with virtual videoconferences from home offices (or kitchens and living rooms).

Financial Advisors who had previously leveraged their in-person selling and presentation skills are required to connect with their prospects and clients through technology platforms that can be cumbersome, impersonal and sometimes confusing.

While we look forward to returning to an environment where we can shake hands, gather in conference rooms and share lunch, remote meetings are likely here to stay.

Our ability to facilitate engaging virtual meetings can be the difference between winning and losing new deals and retaining or losing existing clients. **Organizations that effectively adapt to this new environment and apply innovative approaches will enjoy a competitive advantage.**

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DESCRIPTION

Precision's webinar series is designed specifically for Financial Advisors. The content is based on neurolinguistic principles and provides participants with simple tools and techniques they can use immediately in their remote meetings to better connect with, and engage, clients and prospects.

Upon conclusion of the program, advisors will understand the implications for messaging, slide design and skills, and that simply approaching the digital presentation the same way as an in-person presentation is not the answer.

The content of the program is broken down into three 45 minute workshops.

Workshop One - Engaging the audience in a remote environment: Implications on messaging and materials

- Digital Meetings as a competitive advantage
- The increased importance of clear and concise messaging
- How to adapt slide design to capture and sustain audience attention and increase memory

Workshop Two - Breaking down the digital barrier: Developing skills for success

- Creating a climate for success
- Developing personal connections
- Effectively interacting with your team members
- Managing Q&A

Workshop Three - Managing technology to your advantage

- Technology and platforms: Understanding the choices available and the pros and cons of each
- Setting expectations with meeting participants before the meeting (e.g video vs. audio only)
- Maintaining eye contact, energy and appropriate body language

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In addition to the open program described above, Precision can customize content to a specific firm.



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