

CONNECTING WITH YOUR CLIENTS IN THE VIRTUAL WORLD

With physical distancing measures in place, you will need to not only adapt and reconfigure your meeting process and systems, but you will also need to put more effort into engaging your clients.

The best practices in this checklist can help you map out a seamless client experience as you transition to virtual meetings.



BEFORE THE MEETING

- Check with your dealer and compliance department first for any restrictions or rules regarding the technology platforms that are suitable and trustworthy.
 - Decide on the right virtual platform for your meeting by considering the following:
 - Your client's comfort level in using video conferencing technology
 - The depth of your relationship with your client
 - Your meeting objectives
 - Whether or not you will need screen sharing capabilities
 - Influence any unfamiliar, disinterested or resistant clients by:
 - Providing a sound reason i.e., need to show data
 - Offering a compelling outcome i.e., update on portfolio and markets
 - Starting slow by offering one-way video with audio so client is only able to see you
 - Research and think about what technology will be easiest for your client. Some video chat platforms are straightforward, while others may require clients to download and create a username.
 - Verify that you have the requirements and hardware for a smooth virtual meeting: a good Wi-Fi connection, a quiet environment, a presentable background with personal touches, good lighting, audio devices (speaker, mic) and a camera.
 - Test your devices and ensure you are comfortable troubleshooting or can easily solve technical issues based on the platform you have selected.
- To troubleshoot webinars, you may refer to [this guide](#).
- Confirm a date and time, and email your client:
 - A detailed agenda with the mode of contact
 - Instructions on how your client can download and install your chosen meeting app
 - Documents or links that you will be referring to in your call

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DURING THE MEETING

- ❑ Conduct your meeting while maintaining as many of the in-person meeting habits you have formed over the years, such as: dressing up as you normally would when meeting with a client, arming yourself with any supporting documents and a notepad and pen for taking meeting notes.
- ❑ At the start of the meeting, reassure your client that you are in a private space and that their information remains confidential.
- ❑ When delivering the agenda, ask your client what is top priority for them.
- ❑ Keep virtual meetings short to maintain client's interest throughout.
- ❑ Make up for the deficit of non-verbal cues and real human connection by increasing your efforts to be emotionally transparent, empathetic and genuine in the following ways:

 YOUR LANGUAGE	 YOUR TONE OF VOICE
<p>Think about the way you phrase your message and show more empathy through your questions:</p> <ul style="list-style-type: none"> • “How do you feel about_____?” • “You’re not quite sure _____. Tell me more about that.” • “It seems that_____. I’d like to understand more.” 	<p>Think about your inflection and where you place stress on certain words. Doing so can change the feeling of what you’re saying.</p> <p>Stay upbeat and energetic to keep clients attentive and to help them stay positive.</p>
 YOUR SILENCE AND PAUSES	 YOUR EXPRESSIONS AND BODY LANGUAGE
<p>Create space by refraining from speaking all the time and pausing often to give your client a chance to speak.</p> <p>Resist interrupting your client. If you have an objection or a point to add, write it down and address those points when your client is finished speaking.</p> <p>Check for feedback regularly and ask open-ended questions to engage your client i.e., “what has been most valuable from the things I have said?”</p>	<p>Show your client that you are responsive, listening actively and interested in what they have to say by:</p> <ul style="list-style-type: none"> • Changing your expression to reflect what they are telling you • Leaning forward towards the camera to give the impression that you are looking into their eyes

Conversely, be aware of your client's language, facial expressions and tone of voice and respond appropriately. If these things are not detectable, focus on leading rather than reading them for cues.

- ❑ Schedule your next virtual meeting right away. Regular contact with clients is key to maintaining relationships in the virtual world.
- ❑ Before the meeting is over, circle back with your client to:



ACKNOWLEDGE THE DIFFERENCE

“Virtual meetings might take some getting used to but I want to be able to stay in touch. When things return to normal, we can go back to in-person meetings or do a combination, if you prefer?”



CLARIFY EMOTIONS

“How are you feeling right now?”
“Do you feel better / relieved after this meeting?”
“How has this meeting helped you?”



REINFORCE YOUR COMMITMENT

“When should we touch base next?”
“How else can I help?”

AFTER THE MEETING

- ❑ Promptly send out the meeting summary and documents that you discussed during your meeting.
- ❑ Delegate any action items to your team members and add your notes to your CRM.
- ❑ Seize this opportunity to get feedback on the meeting format. Check in with your client via email or have your team send a simple survey via SurveyMonkey (or another platform) asking how the meeting went and what can be improved.
- ❑ Reflect on how *you* thought the meeting went and what you can do personally to improve for the next meeting.
- ❑ Work with your team to implement relevant changes based on the survey results and your self-reflection into your meeting process.

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Our team of six professionals is committed to providing industry-leading support by creating tools, workshops and presentations to help financial advisors, as business people, to be more successful.

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If you would like further information about our advisor-dedicated resources, visit our website www.ci.com/pd or contact your CI Sales Team.

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