

A New Approach for a Brighter Future

Virtual connections playbook



ONEAMERICA®

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Meeting your clients where they are

As financial professionals, we talk a lot about meeting people where they are. Often what we mean by that is meeting people where they are in their financial journey, which is an important part of helping everyday Americans improve their financial futures.

But there's another aspect to meeting people where they are: the places where you connect to discuss the strategies for improving their financial futures.

In offices, coffee shops and more, you've likely met with current and potential clients in a variety of places. And now, you have a new and convenient place to meet individuals where they are: online.

A virtual connection with real benefits

Let's face it, everyone's busy. Between work and family, commitments and responsibilities, we all have a lot on our plates.

By working in a virtual environment, you can meet clients any time, any place, when it's most convenient for them.

Benefits for your clients

- Connecting with a qualified financial professional from anywhere
- Meeting in a way that works with their schedules and preferences

Benefits for you

- Expanding your reach and increasing sales
- Limiting travel time and costs
- Conducting business in a modern, proven way

Work with us to up your game

OneAmerica® can help you access and adopt this modern approach to selling. The following information will help guide you through the process of setting up your virtual office, with tips to maximize your virtual selling experience.

A computer with a camera and software is all it takes to get started, and our recommendations will help you go farther to create an exceptional virtual experience:

- Don't let yourself be intimidated by technology. This guide will help you get set up quickly and efficiently.
- Master the new tools, know your stuff and be prepared to do your best.
- Be mindful and patient with clients who are new to virtual meetings. In no time, it will be second nature.

And like anything, you have to commit to virtual selling to be successful. Let's get started!

Building your virtual office

Getting started will require having the equipment, software and services to ensure success for meeting clients online. You may even have everything you need already.

For effective results, make sure you're set up with all of the following:

Equipment

Computer and tablet

A desktop or laptop with an additional monitor — for video conferencing or presentations — is required for this setup. An optional tablet can also be a helpful tool, providing touchscreen options and letting you connect with your clients any time, anywhere.

Camera, microphone and speakers

Many computers have their own camera, microphone and speakers, but the quality can vary. You may want to purchase each of these items separately to ensure the clearest communication possible.

Software

Virtual meetings and video software

Webinar (web-based seminar) software is how you will host virtual meetings with video conferencing and presentation capabilities. Most webinar software options allow you to record your screen and conversations during your meetings, and offer cloud based storage as part of your subscription. Make sure the subscription level that you select allows you to have a private hosting room and includes video and storage capabilities.

Annotation software

Annotation software will let you highlight, take notes and draw directly on files when you're sharing a presentation or other documents. It will also let you capture clients' signatures and interact with them directly for a more engaging conversation.

Services

Internet and Wi-Fi

Your virtual office will need a strong internet connection, which can be wired or wireless. What's most important is that you have sufficient bandwidth — the transmission capacity for your internet connection. Video conferencing and sharing content needs a lot of bandwidth to prevent freezing or poor connections. You can check your current bandwidth at speakeasy.net/speedtest, and your internet service provider can help you decide what you need to reliably host virtual meetings.

Designing your physical space

You know that the way you present yourself is an important part of establishing trust and gaining the confidence of your clients. And though you'll be meeting virtually, you'll still need a welcoming and professional physical space to connect with people and discuss their financial futures.

Whether you decide to modify your current office or create a dedicated virtual office, the room, furniture and décor, lighting, and background noise are all important aspects to consider.

Room setup, furniture and décor

The appearance of your virtual office will be your clients' first impression of you and will influence their entire experience, so it's important to think about how you want clients to see you — and perhaps more importantly, how your clients want to see you.

Some aspects to think about when choosing furniture and designing your space include:

- Should the furniture be more traditional or modern, and what does this say about me?
- Will my clients expect to see art or family photos on my desk or in the background?
- Are there any awards or recognitions I can display to show my experience?

Like any office, how you design and furnish your space will be unique to you. The perfect design is an office that makes you comfortable and makes your clients comfortable.

Lighting

Good lighting can make a serious difference for your clients. If the space is too dark, your clients might not be able to see your expressions or feel apprehensive. If it's too bright, you might appear washed out. Standard office lighting should be sufficient in most rooms, but be sure to record some sample footage before your first client meeting to make sure you look your best.

Background noise

Nothing will be more distracting to your virtual meetings than background noise. Choose a space where you think there will be the fewest interruptions, and spend some time listening to hear if people talking or outside noises will be an issue.

Putting your best foot forward

Beyond your virtual office and your physical space, you also have to think about how you present yourself during virtual meetings. How you dress, how you act and more can make the experience better for you and for your clients.

Dress the part

Like any other client meeting, your attire keeps you and your client feeling confident and comfortable. Dress the way your clients will expect, and keep a spare jacket close by for impromptu meetings with clients who have more formal expectations.

Mannerisms

The experience of a virtual meeting doesn't have to feel significantly different than meeting in person. You should always be aware of your body language with your client. If you need to take your eyes off the screen, you may need to briefly explain that you're getting something to show them or checking the clock to respect their time. As you build confidence with your client and they know you're present and focused, you won't have to explain yourself as often.

Additional suggestions

Here are a few tips for connecting with clients online:

- Always keep a supply of extra batteries around. You don't want to stop a great conversation to find batteries for something like your mouse.
- Mute your audio when you are not talking.
- Keep a set of business-appropriate attire in your office space so you're ready to take a meeting at any time.
- If you have the choice, a wired connection is preferred over a wireless connection.
- Load and test your content before your meeting starts.
- If your client takes your meeting while driving, suggest another time to talk or be very general so they don't need to look at the screen.
- Join your call a few minutes early so your client isn't waiting for you.

Getting started with your virtual clients

How do you get virtual clients? Qualified prospects can be easy to spot. They may even let you know that they would prefer to meet online during your initial conversation or email introduction. If people know that you offer virtual meetings, you'll likely start to get virtual clients.

Spread the word

For existing clients who appreciate a virtual experience, offer expanded access to you and your expertise. Send out an email to your existing clients letting them know you now offer virtual meetings.

Setting up appointments

An online calendaring system can help you automate your appointments and help clients see when you're available.

Leading up to the first interview

Once you've made a connection with potential clients, there are several ways to reach out to them before the first formal meeting. We recommend sharing:

- A personal introduction video or email with your bio, including what they can expect when working with you
- An email with tips on joining a webinar

Who's interested in virtual meetings?

Age

The best virtual clients will have no real age barriers. Many people prefer virtual meetings because the format fits their lifestyle. Others may need some simple guidance for their first virtual meeting to acclimate.

Tech-savvy

Some people who are comfortable using a computer or tablet may still be intimidated by the idea of meeting online. Send your clients simple instructions and offer to walk them through the setup at the start of your meeting.

Existing clients

Even if you've met in-person for years, your current clients might like to connect with you virtually, as well.

Beyond the interviews

Building a relationship with your clients doesn't have to be difficult when you're meeting online rather than in person. But there are several ways to establish trust and let your virtual clients know that you're just as focused on them as you would be in-person clients.

Frequent and ongoing communications with your clients keep you front-of-mind with them, and OneAmerica offers a number of useful ways to help you connect with clients throughout the year.

Social media

OneAmerica encourages you to connect with your clients through LinkedIn, Twitter and Facebook.

Website

Your website is a way for customers to get to know you before you ever meet. Plus, it's the easiest way for clients' family and friends to share your information and recommend your services.

Written notes

Not all of your interactions have to be virtual. You can send cards and notes to connect with your clients on special occasions like birthdays, holidays and other milestones.

Regular check-ins

By scheduling regular communications, you'll create a constant presence with your clients. You can then reinforce these communications with the most effective tool for keeping in touch: a personal phone call or a meeting when it's convenient.

Resources and contact information

With this playbook, you're on your way to virtual selling success. For more information, contact us at **1-844-833-5520**.

Note: These concepts were derived under current laws and regulations. Changes in the law or regulations may affect the information provided.

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Products are issued and underwritten by the companies of OneAmerica and distributed through a nationwide network of employees, agents, brokers and other sources that are committed to providing value to our customers.

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