



UP YOUR GAME!

Five keys to crafting an intentional virtual experience. By Sheri Fitts

It's unlikely that organizations will reopen their offices in full during the first half of 2021—or even possibly later this year. Even if they are open, many firms have asked clients not to visit their offices altogether, at least until the COVID-19 vaccine has been broadly distributed. Nonetheless, your clients expect you to be responsive, and meetings still need to be scheduled. Our current and future reality is Zoom. Though we all miss our clients and friends and look forward to the day when we can meet again in person, some level of virtual communication seems to be a “sea change” that’s unlikely to be reversed.

How well are you adapting to this new competitive landscape? Here are five keys to crafting a more *intentional* experience. (“Intentional” is not new-age fuzziness; it’s the sense of doing things with a clear purpose and focus.)

1. PROJECT TRUSTWORTHINESS

Trust takes time to build, but just a nanosecond to lose. In the virtual world, trust can easily be lost if you treat meeting management haphazardly. The only way for your brand to gain trust in the virtual space is to actively communicate your purpose, integrity and client advocacy with far greater precision than before. Therefore, intention matters when building a virtual experience, as well

as the logistical/technical details on how you deliver that experience.

2. START WITH THE END IN MIND

What’s primary purpose for your next meeting? Is it to educate or persuade sponsors about an emerging regulation or governance concern? Do you want to invite audience participation to address a participant challenge? Knowing the purpose upfront will help guide you to the right format for your meeting, whether it’s to be interactive or directed by a single speaker.

Construct and distribute an agenda for the meeting in advance, with roles and responsibilities clearly delineated. For example, a plan sponsor or

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advisor will typically host quarterly reviews, leaving little airtime for the TPA, who often has something of great value to contribute. So TPAs need to use their timeslots wisely and efficiently. (Of course, TPAs also need to think through how they will make their own hosted presentations more intentional.)

3. PROMOTE ENGAGEMENT

The challenge with virtual meetings is that you lose a lot of your ability to read non-verbal cues from your listeners. When explaining a complex idea, for example, how do you confirm with the group that your message is getting across, and keep them from checking out? Are cameras on?

That's why you need arrive to your meeting early and prepare. Before you go live, think about how you'll invite and distribute comments and reactions to what is being said. Are there different constituencies attending, each having a slightly different reason for attending?

Don't forget the basics of maintaining good posture and eye contact with the camera. Be present and lean directly into the screen with the camera at eye level, so that you fill the space. Leaning back in your chair or looking off to the side or, if you're standing in front of the camera, fidgeting in place, will amplify any nervousness. And don't forget to pay attention to your "resting" face when someone else is speaking.

4. LEVERAGE THE VIRTUAL EXPERIENCE AS AN EXTENSION OF YOUR BRAND

In a world of emojis and Instagram, images are rapidly eclipsing the written word in service to communicating a brand. The quality of each broadcast, even down to whether you're using native or virtual

backgrounds on a green screen, speaks volumes about your firm's culture and collective personality. What you decide to display behind your screen presence needs to be intentional. For example, some teams use a corporate office stock image to disguise the fact they are broadcasting from their bedroom or a broom closet. More native backgrounds show artwork or books, a guitar collection, a surfboard—or even a sleeping cat on the couch.

Improving your virtual experience will require an investment of time and money in better video and audio equipment, and possibly modern video editing software and coaching help. Some business owners will throw up their hands at this point, and say, "Not another dollar for marketing!" But think of it this way: Much of your travel budget will likely go unused this year, and (for roughly the cost of a plane ticket and a two-night hotel stay) can be reallocated to upgrading your online presence.

Finally, for high-value meetings with important economic consequences, you may want to bring back some proven brand-building tactics from the "Before Times." Folks who know me know that I often throw out polka-dotted socks at in-person meetings to reward participation. For a recent big virtual meeting, I worked with a client to send a pre-meeting kit containing a book on leadership, notebook and pens, water bottles, etc. These gestures show you care, are willing to invest in relationships, and pay attention to detail.

5. MANAGE THE INTERFACE AS A WELL-DEFINED JOURNEY

A virtual meeting or presentation is an opportunity to show how well you do what you do, but it can be sabotaged if you simply have a one-sided conversation, punctuated with

deadly PowerPoint slides. The key is managing the visual interface to engage your audience and draw them in.

That's why I advocate "*minimal viable PowerPoint*" (MVP) for most meetings, unless you're presenting to a large, anonymous group. Audiences have become more discerning over the past few years, and hiding behind a boring slide deck no longer cuts it. When you invite someone to present in Zoom, change things up by manipulating gallery settings, giving individual participants "the floor," uninterrupted by crosstalk or talking heads. (And for all that's good and holy, learn how to "mute all" when someone is speaking. Home computer or laptop microphones vary widely in quality.)

If you team-sell, using live production apps can bring slides or specific gallery members to life, helps professionalize the online experience, and entertains and engages your audience. Ecamm Live and mmhmm are two that I've been testing out. And in longer sessions, don't forget to toss in a 10-minute break at key intervals. During my breaks I usually play lo-fi music (acoustic rock or jazz) to maintain continuity within my virtual auditorium.

As you contemplate a return and reinvention to "business as usual" post-COVID, I often separate the concept of intentional virtual experiences in terms of what folks can do from a marketing (what to do "now" that's timely) versus a branding (what to do "forever," or what's timeless) perspective. We all now have the opportunity to produce more intentional virtual meetings that integrate thoughtful marketing, sharper branding—and, ultimately, more effective selling—into the forefront of our businesses. **PC**