Virtual
meetings

Virtual meeting checklist

Before your meeting

- ◯ **Get your technology ready.**
  - Watch the tutorial for your preferred virtual meeting platform.
  - Double-check your settings.
- ◯ **Look and sound good.**
  - Look presentable.
  - Check the camera angle.
  - Face natural light.
  - Minimize distractions.
  - Ensure a clean and professional background.
  - Remove or mute background noises.
- ◯ Open all shareable documents and content to ensure they are ready to use.
- ◯ Prep your meeting notes and anything else you need to ensure a successful virtual meeting.
- ◯ Identify a "Plan B" for connecting with attendees and sharing materials in case of technical difficulties.
- ◯ Take a deep breath and know that you can do this!

During your meeting

- ◯ **Follow the recommended virtual face-to-face sales procedures.**
  - View the client and their valid, legible, and unexpired government-issued picture identification.
  - Verify their identify through the videoconference and record the information in the Customer Identification Verification section of the Financial Professional's Report.
  - If your client is not in their state of residence, it may be considered a nonresident sale. In that case, you must follow the Allianz Life nonresident sale procedures.
  - Follow all applicable Allianz Life policies and state requirements when conducting virtual business.
- ◯ **Verbally identify where you are in the meeting's agenda.** (e.g., "We just finished opening remarks and now we'll discuss agenda item #2 …")
- ◯ **Check in frequently with attendee(s).** (For groups: Request round-robin responses – "Are there any more questions on X?" – and wait for each attendee to answer verbally or chat.)
- ◯ Make sure to formally close out of the meeting.

After your meeting

- ◯ Send out all sales materials you didn't distribute in advance.
- ◯ Remember to include any next steps or action items for your clients.

Allianz

M-7395 (4/2020)