



# VIRTUAL PROSPECTING:

## Strategies for Closing More Meetings

- Prepare Differently for Your Virtual Meeting
- Make a Connection Quick
- Improve Your Video Presence
- Close More Sales!



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# VIRTUAL PROSPECTING:

## Strategies for Closing More Meetings

We accessed content from 20 sales experts, articles, videos, and interviews with top advisors in order to compile these best ideas for closing more sales using virtual meetings.

### Four Areas of Tips and Strategies for Improving the Outcomes of Your Virtual Meetings

STRATEGY  
1

Prepare Differently For Your Virtual Meeting



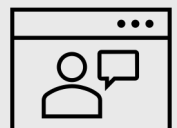
STRATEGY  
2

Make A Connection Quick



STRATEGY  
3

Improve Your Video Presence



STRATEGY  
4

Close More Sales!



# Prepare Differently For Your Virtual Meeting



**Set expectations.** Prior to your meeting, set expectations for the prospect by referring to the meeting as a video call so they will know that a camera will be required.



**Scheduling tool.** Consider [Calendly](#) or other scheduling tools (easier for your prospect to book the meeting and provides automatic reminders.).



**Share agenda.** Create an agenda and share it prior to or at the very beginning of the call to set the stage for an organized meeting.



**Prepare for a shorter meeting.** Prepare to have a meeting that is  $\frac{3}{4}$  to  $\frac{1}{2}$  the length of a normal in-person meeting. People have less attention span during video meetings so prepare to make yours concise and on the shorter side.



**Create visuals.** Thoughtfully create materials to enhance and help engage the prospect while on the call. Create a Capabilities Deck in PowerPoint or Prezi that shares your value proposition and gives a quick overview of your firm. This should be approximately 5-10 slides and include:

- A Purpose Statement
- Your Value Proposition
- Your Services
- Your Specializations (working with female executives, etc)
- Your Team
- How to Get Started



**Practice run through.** Practice by doing a mock meeting where you test out your technology and run through your presentation. Record your mock meeting so you can go back and view your positioning, camera view, eye contact, and any other areas for improvement.



**Invest in your online reputation.** What prospects see when they Google you matters even more when you will not meet in person. What does your LinkedIn profile look like and how about your website? Consider checking out your online reputation and determine if upgrades are necessary.

# Make A Connection Quick

**Set the stage.** Share with the prospect the value that they will receive on this call.

**Engage prospects early and often.** Do not let more than 5 minutes pass without some interaction with the other person.

**Get to know the client.** Virtual sales meetings are usually shorter than in-person meetings, however, make sure you take the time to get to know the prospect at the beginning of the call and throughout. Begin by asking questions like, “What are some challenges you're looking to solve?” or “What is important to you?”

**Ask open-ended questions.** Follow up after the prospect answers your questions with more curious open-ended questions (“Tell me more about that”). And, don't be afraid of waiting through dead air while you are listening and waiting for their answers. With patience, they will tell you what you need to know.



# Improve Your Video Presence

**Authenticity** is more important than perfection – be personable.

**Clear background.** Make sure that what is behind you will not distract from the video conversation – remove clutter from your background.

**Professional backdrop.** Consider getting a backdrop behind you that will help you look professional. The virtual backgrounds in Zoom are good in theory, but often end up skewing the way you look (ie. Your shoulder or ear inexplicably disappears). Check out [Anyvoo.com](https://anyvoo.com).

**Attire.** Choose clothing that you would wear if you were speaking in front of an audience or meeting with your most important prospect. Also, solid colors are better than patterns for video.

**Positioning.** Position yourself so that you are centered in the frame. For the most flattering shot, make sure your camera is not at an odd angle. You may need to adjust the height of your computer by placing it on top of a stand or a large book or two.

**Use your body language when you talk.** Position the camera in a way that allows others to view part of your torso and arms so you can use your body to communicate. If someone is only viewing your talking head, they will miss the non-verbal communication that typically happens when in person.

**Practice posture.** Maintaining proper posture is a fundamental part of your confident presence in a virtual setting. Roll your shoulders back before the call begins.

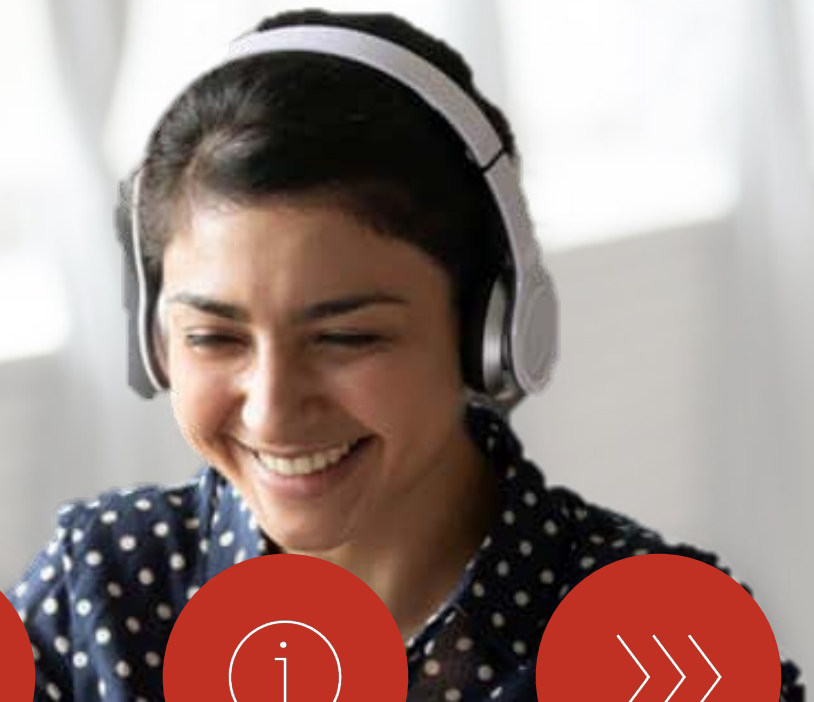
**Strong eye contact** is a critical element of communication when you are in-person. Unfortunately, direct eye contact is nearly impossible on a video call. To have eye contact in a video call, you actually need to stare directly at the webcam. But you don't want to miss out on important visual cues from your prospect, so remember to go back and forth from looking into the webcam and looking at the individual on-screen.

**Practice, practice, practice** with the technology and how you appear on the camera. Record practice sessions to assess your presence later.





# Close More Sales!



**Present slightly faster** when you are virtual. Present with two times the pace than you would if you were meeting in person.



**Use more visuals.** Consider sharing twice the number of visuals than you would if you were in person.



**Summarize.** Your prospect will likely only remember 10-20% of what you say, so make sure you summarize the 1-3 most important points.



**Next Steps.** Share the next steps with the prospect and get agreement.

If you are prepared, connect with your prospect quickly, and have great video presence, there is no doubt that you will dramatically improve the probability of closing the sale!