

Call Mega-Checklist

Control Your Call

Virtual selling requires literacy in verbal and physical communication, setting the scene, managing what's behind you and what's out of sight with a distracted, multitasking audience.

Phase 01 : 1-2 Weeks Before the Call

- ✓ Write agenda and subject line
- ✓ Send agenda to all attendees
- ✓ Send slides and materials to meeting attendees in advance
- ✓ Create a mindset ritual
- ✓ Prepare a version of your presentation that doesn't require visuals as a backup plan

Phase 02 : 10 Minutes Before the Call

- ✓ Add time between calls to give yourself time for your mindset ritual
- ✓ Launch your meeting applications
- ✓ Shut apps and close extra windows
- ✓ Turn off pop-up notifications
- ✓ Put on noise-canceling headphones. Close your door if you have one.
- ✓ Clear your screen desktop of any clutter or private information
- ✓ Remove any personal information from your visible browser bookmarks
- ✓ Launch your meeting on a secondary device so that you can see what your attendees see
- ✓ Have your meeting information ready to copy and paste into your chat window
- ✓ Use a phone dial-in number instead of relying on Voice Over IP (VoIP)
- ✓ Put your most important points on a sticky note at eye-level on your monitor
- ✓ Review your timing, org chart, questions, and speaker notes.
- ✓ Avoid going "off-script."

Phase 03 : Call Start

- ✔ Arrive early and start on time to set the tone
- ✔ Add any unexpected attendees to your org chart
- ✔ Smile
- ✔ Confirm that the allotted time is still the same
- ✔ Encourage your audience to shut down any open programs that might distract them
- ✔ Consider using your webcam during introductions and questions, but turn it off when showing your slides, polls and whiteboards
- ✔ Confirm that your audience's audio and video is working

Phase 04 : Call Duration

- ✔ Social cues are more muted on virtual calls. Pay attention to how long you are talking, whether you are talking over others, or interrupting.
- ✔ Vary your volume, speed, and pitch to convey confidence and conviction.
- ✔ Provide clear verbal transitions between subjects: "We discussed your requirements, now let's move on to the demo," "That concludes the demo, now I will answer your questions."
- ✔ Don't forget the camera is always on you. If you check your email or attend to other work, you will give the impression you're not listening.
- ✔ Put yourself on mute whenever you're not talking to eliminate annoying background noises.
- ✔ Turn off your video if you do something distracting, such as eat or leave the room.
- ✔ Use chat for more than just chatting. Post your presentation, agenda, or links to videos.

Phase 05 : Call End

- ✔ Conclude the call by saying, "Thanks to everyone for the time and insights. I'll spend the last 5 minutes with <Key Decision-maker>. Look for my follow up in the next 24 hours."
- ✔ Before you dismiss everyone, lock in the next step/meeting. Firm up the time and medium for that next interaction.
- ✔ Ask Power's permission to summarize your notes from the call and commit to delivering the summary within 24 hours. Ask them to commit to providing feedback by a specific date and time.