# 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.

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## 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.