

Show Up Like a Pro – What AEs Have to Say

“Top of the list, nail down your change of control and practice it before the meeting.”

“The virtual setting allowed us to quickly toggle system to system, have an open forum for questions, and be able to skip through the deck quickly since it was virtual pages versus a printed deck.”

“Encourage your audience to turn on their Webcams and give them advance notice. It is helpful to get visual cues and see how they are reacting to your messages.

“Pause frequently to make sure questions can be asked and if customer is facing slow connections to make sure you are both on the same pages”

“Have a VERY organized deck that is logistically in the agenda order.”

“Try to scale down images to smaller sizes in decks to reduce needed bandwidth.”

“Check back often with your audience for questions and to ensure they are engaged.”

“Make sure to pause enough for questions and ask very open ended ones that have to be answered before proceeding.”

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“For videos, I go to “share content”, change the drop down on that screen to Optimize for Video instead of Optimize for Text. You will need to ask everyone to mute real quick so there isn’t feedback.”

“Everyone should be prepared with an elevator speech for their section. Prospects have limited time these days, so you want to get everything in...there is no going over time or following up.”

“When you login to WebEx enter your name – MetLife, so it is easy to identify the MetLife team members on the call. “

“Don’t be surprised by the perceived lack of interaction or questions... prospects and brokers are home, able to multi-task, homeschooling, etc. so you aren’t going to get the same level of interaction“

“If someone has a large speaking role that might also involve showing a demo, they should take control of the screen and own control of content.”

“Be sure to “share file” vs “share content” so IM’s, emails, etc. don’t pop up. Nothing would be worse than our team IM’ing about the client/broker and they see it!”

Got tips? Please [click here](#) to send them our way!