Plan for our time together

1. Welcome
   Objectives & Outcomes

2. Preparation
   Mindset & Details

3. Delivery
   Energy & Education

4. Follow Through
   Custom & Clear

5. Closing
   Questions & Answers
Objectives & Outcomes

1. Be better prepared
2. Understand 3 step process
3. Have some fun!
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You...but virtual!
**PRE-FLIGHT CHECKLIST**

**Day prior**
- Send Welcome Video to all participants
- Send presentation slides and PDF (page #s on slides/visuals)
- Set up your co-host with the pre-prepared polls
- Encourage participants to print all needed documents
- Reconfirm timing and Zoom link
- Set up Facilitator as “host” in Zoom

**Day of**
- Test: sound, mics, bandwidth
- Adjust camera angles & background
- Update “preferences” to show pointer when using mouse trackpad
- Test: slides forward and backward
- Add co-host
- Open Chat window (and Q & A, if using Webinar)
- Once started, press record
- At closing, press stop recording

**Day After**
- Send Thank You Video to all participants

**Backup Plan**
- Send participants a copy of presentation as a backup
- Plan B conference number and PIN?

**GREEN ROOM**

**Day of**
- Dress up
- Background set (place a piece of white paper or a white tablecloth on the table you are sitting at but make sure it can’t be seen in the frame. It will give you a bit of fill and bounce)
- Standing Lighting: take a tall lamp and set it next to the computer on the side of your face you feel is best. The lamp should be in line with and slightly behind the computer so the light falls nicely on your face
- Standing, not sitting
- Look AT the camera
- Resting face when not speaking
- Smile when clicking “leave meeting” (twice in Zoom)
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Follow Through
“It doesn’t matter if your intent is honorable if your impact is not.”
- Linda Hill
What do you bring to a meeting?
The 3 Clear Points - Stories

1. Context + Emotion
2. Two to 50X more powerful
3. You must have stories at-the-ready
VISUAL IMPACT

Show. Don’t tell.

You’ve heard this phrase, but what does it mean? In the context of a meeting or presentation, it means having powerful, well-designed visuals that help power your narrative arc. The purpose of this Sales Tool is to suggest three different ways to bring visual impact to your meetings and presentations.

Hip pocket frameworks

Hip pocket frameworks are simply drawings that you “carry around” with you at all times, such that you can pull them out of your hip pocket and use a whiteboard, a flip chart or even a piece of paper to draw them out for your audience. These in-the-moment, at-the-ready frameworks pull your audience’s attention toward you and keep you in full command of the room.

Art

Another way to achieve visual impact is through art. And while every meeting or presentation doesn’t warrant art, high-stakes client interactions often do. Art can be a picture, a symbol, or even an object that’s been entirely thought through, designed and produced. Just like art hanging on a wall, these extra efforts make your presentation bespoke.

Slides

The most common way to add visual impact is through slides. But in order for slides to truly have impact, they must be designed, streamlined and not over-stuffed. There should be very few slides, and each one should have a compelling picture or image that punches a point you are making, offers a metaphor, or drives your narrative arc. If a slide has words, it should have fewer than 10.
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Seth!
You are off and away on a great new journey.
You will need socks...

Best, C

Craig Wortmann
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