

## All you need to know about Virtual Meetings

(For internal circulation only)

### 1. Pitching for Virtual Meetings

Your engagement with clients will depend on the nature of your relationship with them and therefore we have segregated the approach as follows:

#### A] Hot Relationships (met clients in person or virtually atleast once):

*Introduction for a virtual meeting*

Dear Sir/Madam,

I hope you and your family are safe and healthy. The coronavirus pandemic is spreading at a fast pace and the end doesn't seem near. As social distancing and working from home will continue for unforeseeable future, it might be difficult for us to meet in person. In such a scenario virtual meetings can help us stay connected and informed about the impact of the market movement on your portfolio. It will be great if you would let me know if you are comfortable with this concept and I can arrange for a virtual meeting at a date and time convenient for you.

*Few other reasons to catch up:*

- It's been long since we have met each other can we connect via video call and discuss few things which is happening in the market
- I would like to review your portfolio and take you through the changes required if any due to market impact in recent months.
- Being our preferred relationship, I would like you to benefit from the insight of our in house expert and research team. So can we arrange a virtual meeting to discuss the same?
- In order to keep you abreast with the current market outlook, we have prepared a monthly presentation on both equity and debt market outlook. I can give you a brief understanding of our in-house research view and the way forward virtually. Can you please let me know a suitable date and time for a virtual meeting?
- In current market environment, the government is taking several measures to ensure revival of the economy. In order to give you an update on the measures taken by the government and the impact of the same on the economy, I would like to have a virtual meeting with you as per your convenience
- The volatility in the markets has had a significant impact on the portfolio of many investors. This is good time to review your portfolio and make adjustments if required. Sir I can help review your SK as well as Non-SK holdings over a virtual call

#### B] Warm Relationships (not met in person or virtually but spoken over phone two times or more):

*Introduction for a virtual meeting*

Dear Sir/Madam,

I hope you and your family are safe and healthy. We have been interacting over phone for some time now and I was hoping to meet you in person. But due to social distancing and lockdown situation, we will continue working from home for unforeseeable future. In such a scenario virtual meetings can help us stay connected better and have a detailed interaction of the market movement on your portfolio

along with reports and presentations that I can take you through. It will be great if you would let me know if you are comfortable with this concept and I can arrange for a virtual meeting at a date and time convenient for you.

*Few other reasons to catch up:*

- I would like to give you an update on the happenings in the market. Can we connect via a virtual meeting as per a date and time convenient for you?
- I have some interesting presentations and analysis that I would like to share and discuss with you. Can we have a virtual meeting at a suitable date and time to discuss the same?
- I have conducted a detailed review of your portfolio and would like to take you through the same.
- In order to keep you abreast with the current market outlook, we have prepared a monthly presentation on both equity and debt market outlook. I can give you a brief understanding of our in-house research view and the way forward virtually. Can you please let me know a suitable date and time for a virtual meeting?
- In current market environment, the government is taking several measures to ensure revival of the economy. In order to give you an update on the measures taken by the government and the impact of the same on the economy, I would like to have a virtual meeting with you as per your convenience
- The volatility in the markets has had a significant impact on the portfolio of many investors. This is good time to review your portfolio and make adjustments if required. Sir I can help review your SK as well as Non-SK holdings over a virtual call

**C] Cold Relationships (only spoken once or less):**

*Introduction for a virtual meeting*

Dear Sir/Madam,

Please let me re-introduce myself. I am \_\_\_\_\_, your IS/ MFS from Sharekhan. I am responsible for managing your mutual fund investments and also help you with any queries or support relating to your investments. I hope you and your family are safe and healthy. Due to social distancing and lockdown situation, we will continue working from home for unforeseeable future. In such a scenario virtual meetings can help us stay connected better and I can also help you with any queries on transacting digitally. It will be great if you would let me know if you are comfortable with this concept and I can arrange for a virtual meeting at a date and time convenient for you.

*Few other reasons to catch up:*

- In the current lockdown situation, Sharekhan has taken the initiative to educate their clients by conducting virtual meetings on financial literacy. We have organized a virtual investor awareness program for our clients. This session will help you take informed investment decisions in volatile markets
- I am sure the volatility in the markets must have caused a lot of apprehension regarding your investment; hence we are reaching out to all our investors to give them some comfort and help them understand how to tackle such a situation. I would like to conduct a virtual meeting to discuss topics like asset allocation, financial planning, retirement planning, goal based investing etc.

## 2. Tips to ace a Virtual Meeting

### Do's

- Share agenda in advance and be prepared.
- Join the meeting few minutes in advance to check your video, audio and background set up are in order.
- Inform your family members about your meeting schedule so that you are not disturbed or interrupted during your meeting.
- Make sure your client is familiar with the software you use for video meetings. Brief them before the meeting. Wear formal attire if your video meeting is with a prospect or existing client. This will give you a professional feel. It is best to avoid holiday attire.
- Start the conversation with an icebreaker. While using video, unstable internet connection can interrupt conversations through a lag at your end. You may consider switching off video unless you are not sharing your screen. Switch off mic when you are not speaking. This helps in listening to the speaker clearly.

### Don'ts

- Don't be distracted during your meeting. Minimize or log out off from windows/applications which are not necessary until the meeting is over. You may also keep your phone away to avoid getting distracted from social media notifications or phone calls. Keep your phone on silent mode.
- Don't speak while looking somewhere else as this could be offensive for the other participant. Making eye contact with the participant helps in having an engaged conversation. Try to look at the web camera as much as possible.