VIPS

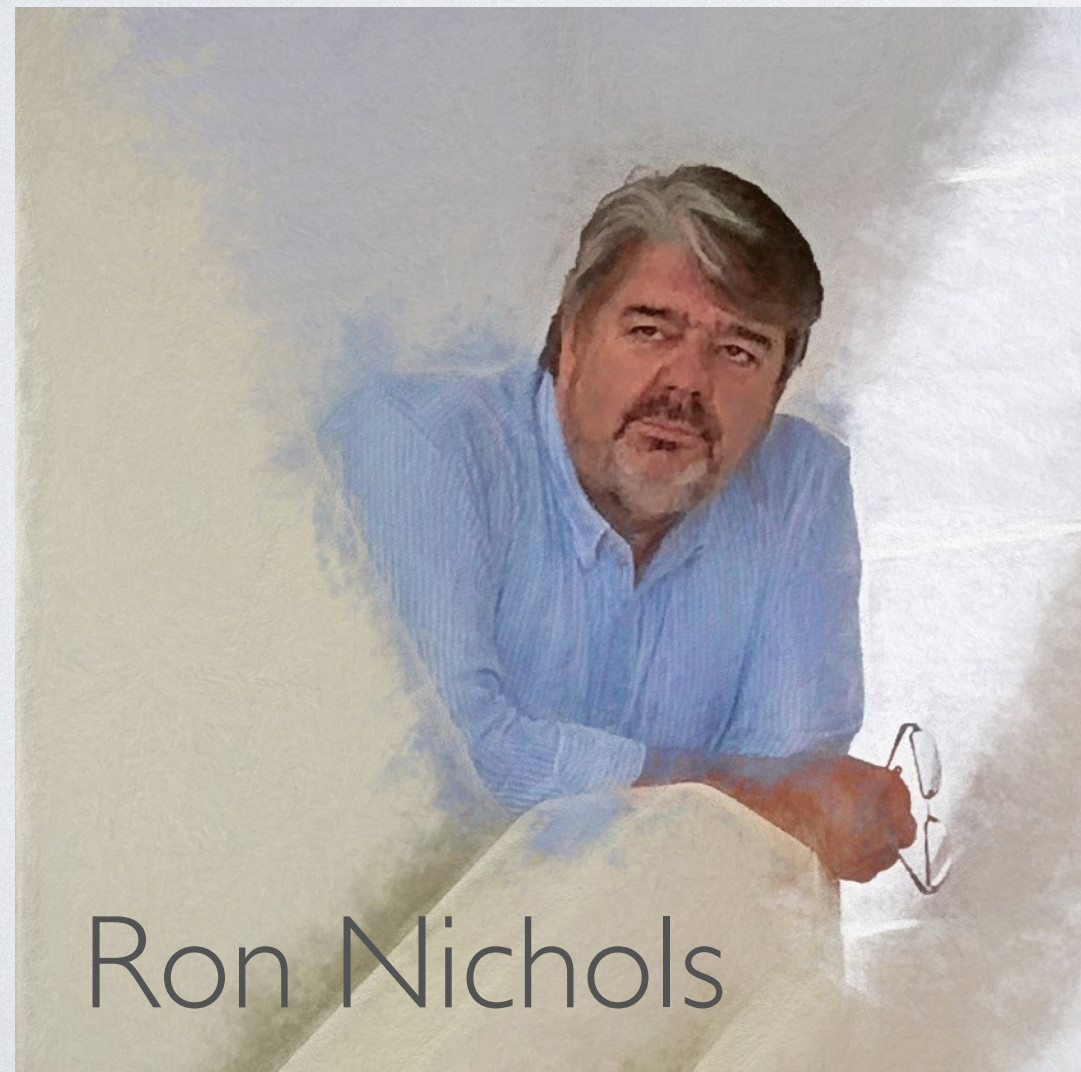## Virtual In-Person Selling

Ron Nichols

Configuring Zoom for Remote Meetings

PROSELECT

WHY REMOTE MEETINGS?

- Great for out-of-town clients

- Customer convenience

WHY ZOOM MEETING?

- The platform works well and the user interface is simple

- It's fairly easy to get customers up and running

- It has a free version

CAN I JUST USE A FREE ZOOM ACCOUNT?

- One-on-one meetings have no time limit

- More than two connections, a 40 minute limit

- Pro Account is about $15 month, up to 50 in meeting

SETTINGS IN ZOOM TO PRECONFIGURE

- Preferences from the top Menu

- MAC - Zoom > Preferences

- PC - Edit > Preferences

Settings

⚙️ **General**

🎥 Video

🎧 Audio

📤 Share Screen

💬 Chat

🖼️ Virtual Background

🔴 Recording

👤 Profile

📊 Statistics

⌨️ Keyboard Shortcuts

♿ Accessibility

☐ Use dual monitors ❓

☐ Enter full screen when starting or joining a meeting

☐ Automatically copy invitation URL once the meeting starts
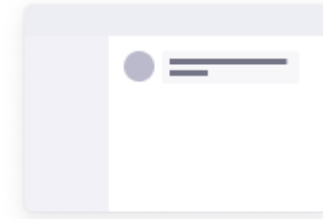
☑ Ask me to confirm when I leave a meeting

☑ Show my meeting duration

☑ Add Zoom to macOS menu bar

☐ Stop my video and audio when my display is off or screen saver begins

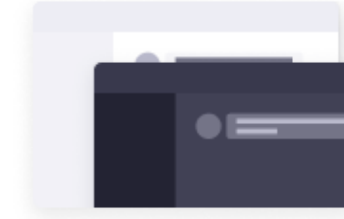☑ Remind me [10 ⇕] minutes before my upcoming meetings

Theme

○ Light ○ Dark ⦿ Use System Setting

Pro Features

Reaction Skin Tone

👍 👍🏻 👍🏼 👍🏽 👍🏾 👍🏿

View More Settings ⬀

zoom   SOLUTIONS ▾   PLANS & PRICING   CONTACT SALES

SCHEDULE A MEETING   JOIN A MEETING   HOST A MEETING ▾   👤 SIGN OUT

PERSONAL

Profile

Meetings

Webinars

Recordings

Settings

ADMIN

› User Management

› Room Management

› Account Management

› Advanced

Attend Live Training

Video Tutorials

Knowledge Base

Meeting   Recording   Telephone

Schedule Meeting

In Meeting (Basic)

In Meeting (Advanced)

Email Notification

Other

Schedule Meeting

Host video
Start meetings with host video on

Participants video
Start meetings with participant video on. Participants can change this during the meeting.

Audio Type
Determine how participants can join the audio portion of the meeting. When joining audio, you can let them choose to use their computer microphone/speaker or use a telephone. You can also limit them to just one of those audio types. If you have 3rd party audio enabled, you can require that all participants follow the instructions you provide for using non-Zoom audio.

◉ Telephone and Computer Audio
◯ Telephone
◯ Computer Audio

Join before host
Allow participants to join the meeting before the host arrives

Schedule Meeting

In Meeting (Basic)

In Meeting (Advanced)

Email Notification

Other

Use Personal Meeting ID (PMI) when scheduling a meeting   Modified   Reset
You can visit Personal Meeting Room to change your Personal Meeting settings.

Use Personal Meeting ID (PMI) when starting an instant meeting   Modified   Reset

Require a password when scheduling new meetings   Modified   Reset
A password will be generated when scheduling a meeting and participants require the password to join the meeting. The Personal Meeting ID (PMI) meetings are not included.

Require a password for instant meetings
A random password will be generated when starting an instant meeting

This option has been changed because   ✕
• Use Personal Meeting ID (PMI) when starting an instant meeting is updated.

Require a password for Personal Meeting ID (PMI)

Embed password in meeting link for one-click join
Meeting password will be encrypted and included in the join meeting link to allow participants to join with just one click without having to enter the password.

Require password for participants joining by phone

⏺ Help

Use Personal Meeting ID (PMI) when scheduling a meeting

You can visit Personal Meeting Room to change your Personal Meeting settings.

Modified   Reset

Use Personal Meeting ID (PMI) when starting an instant meeting

Modified   Reset

Require a password when scheduling new meetings

A password will be generated when scheduling a meeting and participants require the password to join the meeting. The Personal Meeting ID (PMI) meetings are not included.

Modified   Reset

Settings

- General
- **Video**
- Audio
- Share Screen
- Chat
- Virtual Background
- Recording
- Profile
- Statistics
- Keyboard Shortcuts
- Accessibility

Camera: FaceTime HD Camera (Built-in)

○ 16:9 (Widescreen) ● Original ratio

My Video:
- ☑ Enable HD
- ☐ Mirror my video
- ☑ Touch up my appearance

Meetings:
- ☑ Always display participant name on their videos
- ☐ Turn off my video when joining a meeting
- ☑ Always show video preview dialog when joining a video meeting
- ☐ Hide non-video participants
- ☑ Spotlight my video when speaking
- ☐ Display up to 49 participants per screen in Gallery View

Settings

General

Video

Audio

Share Screen

Chat

Virtual Background

Recording

Profile

Statistics

Keyboard Shortcuts

Accessibility

Local Recording : Store my recordings at: 📁 /Users/ronnichols/Docu... ⇕ [Open]

83.22 GB remaining

☐ Choose a location to save the recording to after the meeting ends

☐ Record a separate audio file for each participant

☐ Optimize for 3rd party video editor ⊙

☐ Add a timestamp to the recording ⊙

☑ Record video during screen sharing

☐ Place video next to the shared screen in the recording

☐ Keep temporary recording files ⊙

Cloud Recording   19.69 GB used   [Manage...]

You have 110.6 GB of cloud record storage

Paid Option

WHAT THE CLIENT WILL NEED

• A computer with a high-speed internet connection

• Mic and speakers or head-phones or headset. Webcam is also nice.

• Access to email and text messages

• Their cell phone

• Credit card to pay for purchases

PREPARING YOUR CLIENT FOR THE VIRTUAL REVEAL

- Explain this is a time to place orders for their products

- They will be viewing and selecting images from their home or office

- This is a live meeting not an online gallery

- Persons who need to be involved in the decision making must be present

- They should be free of distractions (co-workers, kids, etc.)

- Plan on about 45-60 minutes

CLIENT TOUCH-POINTS FOR VIPS

- Confirmation of appointment

- Technical prep tests

- Final confirmation

- Reminder text, confirmation of tech prep tests

CONFIRMATION OF APPOINTMENT

- Date and time of Session

- Equipment needed

- Expectations (ordering)

- Followup info will be coming

TECHNICAL PREP TESTS

ABOUT 3 DAYS PRIOR

- In order to make our session more efficient…

- Send room images through SendMyRooms

- Check Internet Speed
  speedtest.net

- Zoom System Test
  zoom.us/test

SPEEDTEST.NET

Clients should have at least 3 Mbps both up and down
Photographers should have 7-10 Mbps

ZOOM.US/TEST

Downloads and installs app
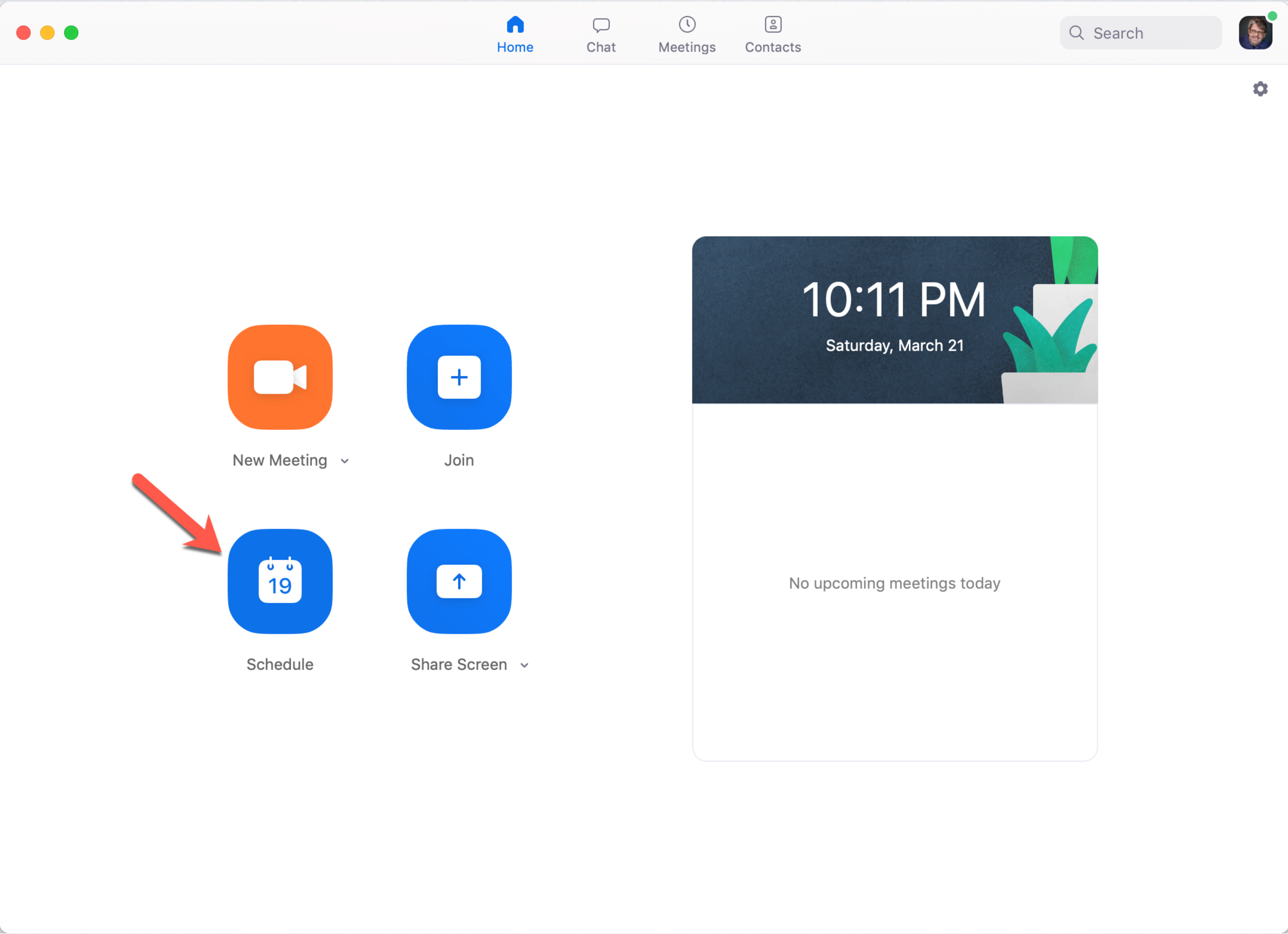Checks audio and video

FINAL CONFIRMATION

DAY BEFORE OR MORNING OF

- Simple reminder

- Login Information

TEXT REMINDER

HOUR OR TWO BEFORE

- "I'm so excited…"

- Make sure they received email with login info

- See you at 2:00 PM

ProSelectSoftware.com