

Virtual meeting advisor checklist – ZOOM

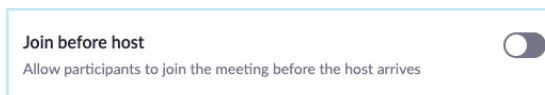
Essential technology setup guide for Zoom virtual meetings

As client expectations change and the world becomes more virtual, it's critical for advisors to create a premium virtual meeting experience for clients and prospects. This checklist, created specifically for advisors, provides a step-by-step guide to ensure your Zoom meeting is set up correctly from a technology standpoint.

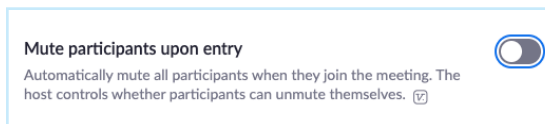
Pre-meeting settings—initial Zoom setup

The below items can be found in the general Zoom settings on the left-hand side of your Zoom panel. By configuring these seven settings now, you'll be able to save time in the long run when setting up individual Zoom meetings.

- 1 Turn OFF “Join before host”**
- Prevents your clients and prospects from entering your meeting before you arrive.

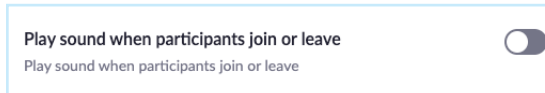


- 2 Turn OFF “Mute participants upon entry”**
- Creates less friction when you begin your meeting, as your clients will be able to speak freely from the outset.



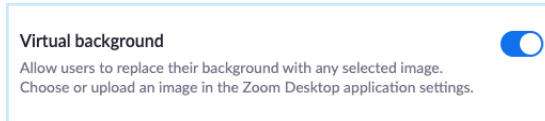
3 Turn OFF “Play sound when participants join or leave”

When hosting group or family meetings, the beeping sound can be distracting.



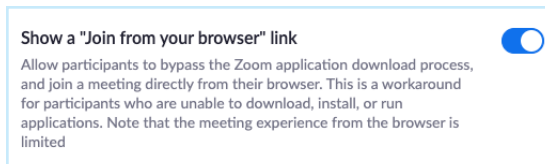
4 Turn ON “Virtual backgrounds”

Allows you to find a virtual background of your choice to create a premium meeting experience.



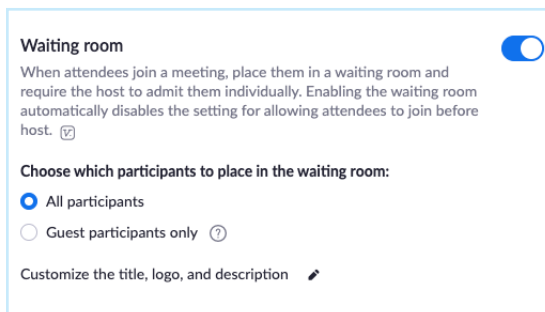
5 Turn ON “Show a ‘Join from your browser’ link”

Allows clients and prospects to enter your meeting without having to download Zoom onto their computers.



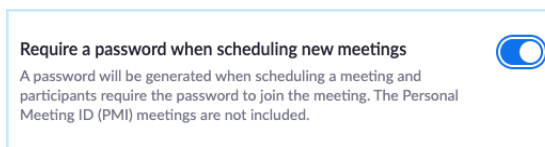
6 Turn ON “Waiting room” and add your logo

Create a premium experience for clients by enabling a waiting room and adding your logo and a personalized message.



7 Consider turning ON “Require a password when scheduling new meetings”

Security has recently been an issue on Zoom. If you want to create a secure meeting, turn passwords on; the downside is that clients must complete an additional step to enter the meeting.



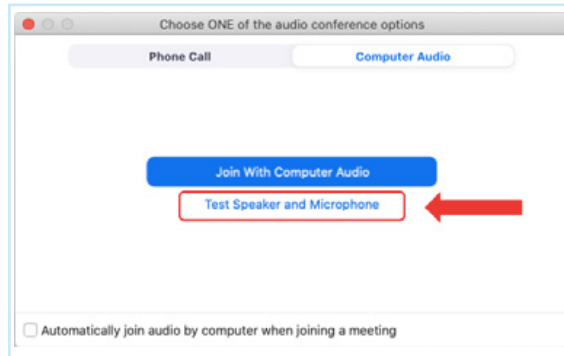
In-meeting setup—checklist for running a smooth meeting

The items below will be visible once you join the Zoom meeting; you'll want to walk through these steps each time you start a meeting.

1 Use “Test speaker and microphone”



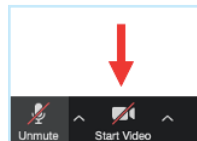
When you enter your meeting, Zoom will prompt you to select either computer audio or phone. Computer audio works great, but make sure you click “Test speaker and microphone” before starting the meeting.



2 Start your video and ensure your background looks professional



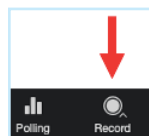
Click “Start Video” and make sure your background looks professional. If you want your clients to turn on their video, then you must do so first. .



3 Make sure “Record” is disabled



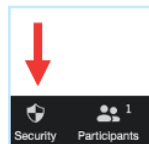
Make sure the “Record” feature is off. You'll know it's off if the record button is gray.



4 Lock your room (once your client enters)



To ensure your Zoom meeting room is locked, click the “Security” button and then click “Lock meeting.” This will prevent anyone else from joining.



5 Be ready to unmute your client



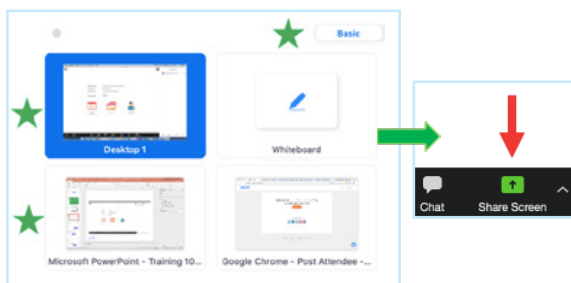
Click **“Participants”** at the bottom of your Zoom panel and then unmute your client by clicking on the red microphone next to the participant’s name.



6 Share your screen



Click the green **“Share Screen”** button at the bottom of your Zoom panel. You then have the option to share your screen, slides, or whiteboard.



7 Conduct a pre-meeting technology check with your client



The day before your meeting, have a customer service associate schedule a 10-minute technology check to get your client set up and feeling comfortable on Zoom.

This material is for informational purposes only and is not meant as an endorsement for any particular product.


Before using any of the programs and/or applications referenced, please ensure that you have permission from your firm to use them.

John Hancock Investment Management

Created by Brendan Barca Solutions © 2020

John Hancock Investment Management and Brendan Barca Solutions are not affiliated.

John Hancock Investment Management Distributors LLC, Member FINRA, SIPC, 200 Berkeley Street, Boston, MA, 800-225-6020, jhinvestments.com

A company of  **Manulife** Investment Management

CAR 1120-01263 **MF1168629** 6/20

THIS MATERIAL IS FOR INSTITUTIONAL/INVESTMENT PROFESSIONAL USE ONLY. NOT FOR DISTRIBUTION OR USE WITH THE PUBLIC.