



VIRTUAL OPERATIONS & SALES WORKFLOW

Many of the back-office interactions with clients usually take place over the phone or through email. This guide will give you ideas for technology additions as well as virtual workflow steps for those interactions that typically happen in person.



VIRTUAL SOFTWARE NEEDED

- 1. Online meeting service:** [Zoom](#), [GoToMeeting](#) and [Join.Me](#) are a few of the cloud-based technology solutions that we recommend. You will need to establish an account with your software of choice and test it with someone you know.
- 2. Camera:** Most laptop computers have cameras built in, but you can buy a separate camera to attach to your computer through a USB connection.
- 3. Cloud-based file storage:** Microsoft One Drive, GSuite or Amazon Drive – you will utilize this as a virtual place for client files. This should be a back up process your practice has in place already, if the files are not already uploaded to a cloud-based CRM. There should be a file structure within the file storage that the entire team is aware of so they can work collaboratively on client documents.
- 4. Cloud-based Shared Calendar:** Microsoft Suite and GSuite both offer shared calendars as part of their product license. Most CRMs offer a shared calendar as well that syncs with client profiles that exist within it. There are many online calendar systems out there, but the practice will need to choose one that can be accessed from anywhere.
- 5. Cloud-based CRM:** Most CRMs are cloud-based and can be accessed from many platforms. Make sure your team is diligent about documenting every interaction they have with a client into the CRM so that if multiple teammates are fielding calls from the same client, they can update them as to what's going on with their question.



TO DOS

1. Create a FedEx or UPS account so that your teammate working remotely can schedule pick ups for your “Define Kits” and other mail from their home.
2. Take an inventory of anything physical that you send to prospects home with you.
3. First Appointment Booking Follow Up Email:
 - Create a one-page document for your clients on how to use the Online Meeting Service of choice. Easy, step-by-step.
 - Email confirming their appointment that includes the online meeting link and dial in information.
 - Tell them in the email that you will call them two days in advance of the meeting to confirm the appointment and answer any questions they may have about the virtual meeting.
 - Include a list of what the need to send you prior to the appointment. Give your clients multiple ways to get the information to you. **Email:** include the email address // **Fax:** include the fax number // **Upload:** include drop box or box instructions.
4. Create a first appointment follow up email: The body should include specifics about what you are waiting on “keeping an eye out for” in terms of documents, statements & financial inventory form that is needed for the appointment. Emphasize that it must be uploaded / emailed / faxed at least 48 hours prior to the appointment date/time.
5. Determine if you want to use a Text Software program to drip on your appointments to remind them, get confirmation and keep them engaged.
6. Determine a dictation program / application that will be used to record notes from every appointment. You can use Dragon Dictation, Pocket dictate, iRecorder Pro and many more.
7. Second Appointment & Beyond Booking Follow Up Email:
 - Email body confirming their appointment that includes the online meeting link and dial in information as well as what to expect at the meeting.
 - Attach the one pager on how to use the service again so it’s convenient.





VIRTUAL FILE STORAGE SET UP

1. Create a weekly appointment folder. Within that folder, create sub folders for each day. This is where you will load client folders for the advisors to access.
2. Create a folder named “client documentation.” Within that folder, create a new folder for each client or buying unit.
3. When you name files, they should always have the same naming convention so that they are easily accessed by anyone in your firm – make it custom to your practice.
 - o i.e (client name_file type_amount_company)
4. When it’s time to move a client folder to an appointment sub folder for the advisor, the entire client folder goes into the daily sub folder, so the advisor has access to everything that client has ever done at their fingertips.

