The Battle for Hearts, Minds, and Attention in Virtual Meetings

By Rob Jolles
The Battle for Hearts, Minds, and Attention in Virtual Meetings

By Rob Jolles

Given the realities of the coronavirus pandemic, upping your virtual communication game is mandatory. Once this health crisis is over, the demand and desire for advisors and clients to work together virtually is not going away, nor should you want it to. After all, if you can’t be face-to-face with your clients, would you rather send an email, speak on the phone, or meet virtually?

The fact is, advisors will continue to need to do more than sell; they’ll need to connect on a deeper level with their clients virtually. When virtual conversations are conducted properly, the results can be surprisingly productive. When they’re not, potential results, time, and future opportunities are wasted.

Your success or failure at virtual client meetings often has less to do with your product knowledge and more to do with your ability to gain—and sustain—your client’s interest. You need to communicate like a pro—virtually.

There aren’t nearly as many differences between in-person and virtual communication as you might imagine. The biggest difference is the array of distractions your client is muddling through during your virtual meeting. Imagine if you were face-to-face with a client who randomly started reading email, texting, or looking up something on the computer. You’d be mortified. But that’s what you’re up against in a virtual meeting. Fortunately, there are ways to keep the client’s attention on you. Gaining and maintaining attention comes down to mastering the following three points:

1. Grabbing the client’s interest right out of the gate
2. Sustaining that interest throughout your conversation
3. Finishing strong so you leave the right impression

I believe you can benefit by thinking like a juggler. Once upon a time, I was a darn good juggler. I could juggle in a weave, in a circle, off the floor, off the wall, around my back (a crowd favorite), off my knees, and off my head. As my pièce de résistance, I brought an apple into my performance and ate it while I juggled. I became quite skillful, with a lot of tricks. One of my biggest challenges, however, was learning how to put my many tricks together to produce the most compelling show.

Through trial and error, I shifted tricks around as I tried to create the perfect act. I tried leading with my best trick, but then I had trouble holding my audience—the rest of the performance would slide downhill. I tried holding my best trick for the end, but then I had trouble getting my audience’s attention, let alone effectively building any momentum.

I finally stumbled on a formula that worked. I opened with my second-best trick, an around-the-back crowd favorite. This let me grab people’s attention and still keep something big for later. Of course, I sprinkled a number of other moves throughout to maintain the attention of my audience. Then, at the end, I brought out the pièce de résistance: the apple. Okay, I was just a juggler, but the crowd always went nuts over that apple, and I’d finish my performance with people on the edge of their seats, cheering for more.

YOUR CONVERSATIONS

Now, let’s shift to you and your conversations—especially your virtual conversations. How are you organizing your material? You may not realize it, but you have tricks too. For the sake of this article, let’s call those tricks “moves.” Your moves include compelling stories, analogies, metaphors, dramatic visual aids, and more. The juggling formula applies here, and using it requires you to ask yourself the following two key questions:

1. “What’s my second-best move?” Open your conversation with it.
2. “What’s my best move?” Close your conversation with it.

When you start a conversation with strength, and you finish a conversation with even more strength, a lot can be forgiven in between. This doesn’t mean the body of a conversation should be ignored; we’ll go over a host of ideas for holding the attention of those you are communicating with. It does remind us, however, that strategic placement of key delivery components is critical.

Let’s begin with your first move—the first words out of your mouth—and build on it. You need to incorporate something extremely important in this move: You
need to remind clients why they are there. Sometimes I wish a client would look me in the eye, and say: “I really don’t see a need for me to be here. What’s in it for me? Why do I need to listen to what you have to say?”

I think it’s one of the most important questions a client can, and should, ask. If you disagree, please consider the alternative: You schedule a conversation with a prospect. Maybe the prospect was vaguely interested in meeting with you, but that was a while ago, when you scheduled the call. Now it’s a week later, and the prospect barely remembers your name let alone why you’re meeting. Maybe the prospect was coaxed by a spouse to set up the meeting. Maybe the last time the prospect had a meeting like this, the presentation was a mess and the conversation was a waste of time. These unhappy people do not appear on screen with signs saying, “Not Happy to Be Here!” But they are thinking, “What’s in it for me?”—also known as “WIFM”—which happens to be the most important question.

Every conversation— I repeat, every conversation—should clearly address the benefits to your client at the very beginning of the discussion. There’s no need to take clients on a journey that will allow them to somehow discover the answer to this question. If someone immediately sees value in what you are about to say, you have a much better chance of focusing that person’s attention on your conversation. You need to get creative with your moves to open strong and build interest. You could:

- Begin your conversation with a story
- Begin your conversation with a quote
- Begin your conversation with an analogy
- Begin your conversation with a visual aid

If you’re looking for a great resource to spice up your conversations, you might want to try Bartlett’s Familiar Quotations, available online.

Now that your client knows WIFM, and you’ve used your second-best move as an attention-grabber, you need to maintain that interest. There is no substitute for knowing your material, but if it’s not communicated in an engaging manner, the message may land on deaf ears. Here are 14 ideas that can help you sustain interest during a virtual meeting:

**Participating activities.** Rather than just providing a key piece of information, create an opportunity for your client to participate in the message. This can take many forms. For example, an interesting case study or poll result allows clients to provide opinions and engage with the key information you want to share.

**Anecdotes help sustain interest and help others to retain the information you are sharing. But you want to strategically pick the time and place for an anecdote, because too many anecdotes will dilute the message you are working to deliver.**

**Personal labeling of concepts.** You can soften your message and nudge your client closer to the screen when you personally label your message. Rather than saying, “I like to look at these things this way . . .” you might personally label your message by saying, “One of my Rob’s Rule’s is . . .” These labels should represent simple ideas unique to the advisor and shouldn’t butt heads with compliance.

**Pace.** Pace refers to the speed with which you speak. There is no perfect pace. The key, however, is to vary your pace as you speak. Speaking faster signals urgency, excitement, passion, or emotion. Speaking slower signals importance, seriousness, or significant ideas.

Varying the pace makes your speech more interesting to listen to.

**Voice.** Varying the strength and pitch of your voice eliminates a monotonic delivery and accents the key points you’re making. Adding inflection to your voice makes your message more interesting. Moving your pitch up and down helps make your message sound more authentic. These variations may not come naturally, but they can be learned.

**Anecdotes.** Strategically adding anecdotes to illustrate key points boosts your conversation. Anecdotes help sustain interest and help others to retain the information you are sharing. But you want to strategically pick the time and place for an anecdote, because too many anecdotes will dilute the message you are working to deliver.

**Sense of humor.** This is a valued tool for some but by no means a necessary tool for all. If it comes naturally to you, it sure helps to keep your clients engaged. But if it doesn’t come naturally, it will distract rather than engage your client and should be avoided. There are many other ways to sustain interest: many excellent presenters don’t rely on humor, they rely on working with their natural style. By doing that, they come across as interesting and authentic.

**Nonverbal cues.** These are facial expressions or other physical gestures, which are front and center on the screen in a virtual meeting. Nonverbal cues add interest and credibility to your message. Facial expressions can play a major role in maximizing the emotional impact of your message; they may have a greater impact than the words you use.

**Mobility.** An excellent way to sustain interest is simply to move away from the screen and use more space. This can be as simple as moving back in your chair or moving closer to the screen. If you have a standing desk or adjustable screen attachment, you’ll be able to sustain interest by moving a bit.
When you screen-share, the screen takes momentum and your client's attention. The questions get answered, and the conversation abruptly ends. If there's an expert who could add to your meeting, your client will be impressed and you'll boost your confidence. If you meet virtually, a guest speaker is a steal away. When you meet face-to-face with clients, it's usually not feasible to bring a guest speaker. But when you meet virtually, a guest speaker is a link away. If there's an expert who could add to your meeting, your client will be impressed and you'll boost your confidence.

Visual aids. One of the best features of video conferencing platforms is the ability to utilize visual aids. Visual aids are appealing and invaluable. Sharing your screen allows you to use PowerPoint, graphs, video, spontaneous work on white boards, physical objects, and more. Just remember, don't spend too much time screen-sharing or you'll lose your momentum and your client's attention. When you screen-share, the screen takes center stage and you are minimized.

Guest speaker. When you meet face-to-face with clients, it's usually not feasible to bring a guest speaker. But when you meet virtually, a guest speaker is a link away. If there's an expert who could add to your meeting, your client will be impressed and you'll boost your conversation.

Brief purposeful tangents. This is simply the art of consciously letting the conversation stray in order to explore other ideas within your discussion. Oftentimes tangents will be off-topic, but as long as you monitor the time and the nonverbal cues, they can help build the advisor-client relationship.

Name involvement. Inserting your client's name into the conversation can gently bring a distracted client back to the meeting. For example, “We've seen the market's move, and Jack, you know that's what markets do. What we try to do is … ” The idea here is not to call out or embarrass the client; you also don't want to overuse this technique.

Handouts. Certain documents need to be in front of your client before your meeting begins or as it starts, but there are some nice opportunities to hold other documents back. Use video conferencing features to virtually hand out materials, which gives the illusion of working more spontaneously and adds interest to the conversation.

ENERGY AND ENTHUSIASM

I've saved the best for last. I've often referred to energy and enthusiasm as “the great equalizers.” The fact is, no matter how prepared you might be, virtual communication can lead to any number of little problems. So, if you drop something, pick it up. If you forget something, move on to the next point. If your screen freezes, end the meeting and come back. I could go on. Your client will forgive you for any of these distractions. The only issue a client will not forgive is a lack of energy and enthusiasm—and here's the good news: Energy and enthusiasm, the great equalizers, are 100-percent within your control. Together they are a tool that no advisor should be without to sustain interest.

Many talented advisors and speakers brilliantly gain and hold their audiences as if they were reading poetry. When they speak, listeners feel the momentum building. If it's an advisor and client talking, it's as if they are together traveling on a magical voyage. Then the magic comes to a screeching halt as the advisor says, “Well, thanks for listening to me here today,” stumbles into a close, and fails to finish strong.

A poor ending to a conversation feels like the unsatisfying ending to a movie. Imagine watching a great movie and, after the last line of dialogue, the film stops, the lights pop on, and someone announces: “Well, thanks for coming today.” All that time and emotion invested, and so much of it gets lost when the finish is not handled properly.

One culprit is the dreaded question and answer session. Taking questions is important, and the client who feels comfortable enough to ask questions offers the advisor a valuable compliment. But it's often a momentum killer. The questions get answered, and the conversation abruptly ends.

But that's not how it has to be. I challenge you to think out that finish using your best move. Obsess on it if you have to. Write it out, memorize it. Save your best story, quote, or analogy for the end.

Think about a gymnast's performance. When we watch a gymnast, we see a strong opening, a solid routine, and then the piece de resistance—the dismount. We all wait to see if that athlete can “stick the landing.” You can stick the landing with one final story, quote, analogy, prepared visual aid, or memory that you choose as your best and final move.

Remember, it's often not what you say but how you say it. In the world of virtual communication, with distractions stalking your clients, how you say it has never been more important. So, the next time you're planning a virtual call, remember this: Start with strength, gain and build momentum using the ideas discussed above, and then stick the landing.

Rob Jolles is president of Jolles Associates, Inc. He is a speaker, author, consultant, and coach, and has spent more than 35 years teaching, entertaining, and inspiring audiences worldwide. Contact him at rob@jolles.com.