

MASTERING VIRTUAL SELLING

Micro-Buying Experience Checklist

PRE-MEETING

- Pre-Meeting Personalized Video:** Send a personalized video of yourself, casual and authentic, saying how you are looking forward to the upcoming meeting and talking about key items you will be discussing. Shoot for YouTube, not Hollywood, quality to add authenticity and optimize your time.
- Stage-Setting Content:** Send vision-setting content that can be summarized in a two-minute video to set the vision for how you engage your client, how to think about the problem at hand, where you can help, and so forth. Note that this can be part of your personalized video, a video from an executive or SME from your company, or a one- to two-page document.
- Clarify Meeting Topics Through Polls:** If this is a meeting catering to several people who potentially have different needs, or if there is a set of choices for what you can discuss during the meeting, consider sending a quick poll to the audience to help you rank order the topics and design a productive agenda. There are tools that allow a seller to do this with only a few clicks.

POST-MEETING

- Post-Meeting Personalized Video:** Record and send a video of yourself to all participants, thanking all for the opportunity to hold the meeting, summarizing the key points you want them to take away from the meeting, and listing key action items and follow-throughs.
- Content Follow-Ups:** Send videos or documents that cover deeper elements of what was discussed and material you promised to follow up on. Leverage content created by others for you when necessary.
- Call Recording:** Send the recording of the meeting or clips of important parts to the participants. Ideally, once your buyer is highly engaged with you, this call recording, as well as other pre/post-meeting content, is shared via the DSR, driving easier and more visible interactions for all.