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the most significant areas where I see firms not ready to meet client expectations is being ready to participate in effective virtual meetings. Virtual meeting platforms ...

Brian Tankersley • Mar. 14, 2019



The internet has brought many changes to our office work environment, and one of

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The meeting platform is the foundation for your virtual meetings, and you must pick a platform that's reliable for both you and your clients. Some of my favorite platforms for virtual meetings include GoToMeeting, Skype for Business, Google Hangouts, WebEx, Join.me, Zoom, and Zoho Meetings. You will need to determine your firm's needs – does each partner/manager need their own virtual meeting room (or subscription), or will you share a limited number of accounts across your entire staff? There are a wide range of plans and options available to meet different needs, and some of the platforms, like GoToMeeting and WebEx, do very well when working with people outside your organization, while others, like Skype for Business and Google Hangouts, excel at facilitating internal events and discussions.

Your meetings can only use as much bandwidth as your network will support, so you will need to consider your internet connection and the other demands on your network. The bandwidth you have is divided into two categories – upstream and downstream. Downstream bandwidth (e.g. downloads) is the speed of your internet connection receiving data from the internet, while upstream bandwidth is the speed at which your network can send data to others. Many ISPs have different speeds for uploads vs. downloads – for example, one of my internet connections in my office has a download speed of up to 200 megabits/sec, while the upload speed on this connection is only 10 Mb/s.

If you are conducting many virtual meetings with HD video, have voice-over-IP telephony, and are hosting remote access for employees, this upstream bandwidth can be used up quickly. Road warriors will quickly learn that hotel internet speeds are generally anemic at best, so they should be prepared to use the hotspot on their smartphone if the hotel's internet is not adequate. Cisco Webex has a guide to help you determine how much bandwidth will be needed for virtual meetings at <http://bit.ly/vmbandw>.

You need to have the right equipment in your office or conference room to

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the day, and purchase blackout curtains or blinds if you need to reduce the incoming light.

- An unobtrusive USB headset with a mute button, a volume control, and a good quality mic with a wind screen – because the client shouldn't have to listen to you breathe throughout the conversation due to a bad microphone. I avoid full-sized gaming headsets, as they are often very large, and may have designs that don't fit the image your firm wishes to project – camouflage full sized headphones may be OK when you're playing Fortnite, but it looks strange when you're discussing GAAP or tax issues.
- While Wi-Fi may be OK if it's all you can get, you can get more reliable bandwidth usually over a wired internet connection, which should provide fewer dropped frames and audio interruptions.

Finally, don't forget to dress professionally for your meeting, and check the background area behind you for distractions and confidential information that may be leaked (e.g. whiteboards, flipcharts). You may want to keep an extra near your work area so you can quickly upgrade to a more formal look on a moment's notice. Remember that your first impressions are made quickly, so do everything you can to help you and your staff look the part every time they represent your firm.

Virtual meetings are a very effective way to work with your team and clients, but many firms have not given their teams the tools they need to make the most of videoconferencing. By picking the right platform, internet connection, video and audio hardware, and meeting room layout, you can change the way your team and your clients see you when meeting online.

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