

WELCOME



Robert Coulter,
General Manager,
Partnerships

Webinar Wed 10 June

11.00am to 12.00pm

How to provide
outstanding service
virtually
1hr CPD

TAL |  **afa**



Jason Poole

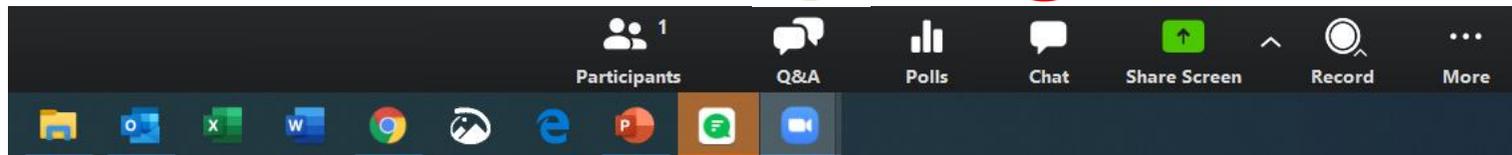


Tyson Jonas

Today's webinar



- **1 Hour CPD** available – AFA will send details within the next week.
- As a webinar attendee you are on 'mute' during the webinar
- Questions will be answered at the end of the presentation. Please use the Zoom QA function (not the Chat function) to ask your question.



PRACTICE MANAGEMENT

Adapting your business to provide outstanding service virtually



Presented by: Marshall Ross, Jason Poole, Tyson Jonas.

BUSINESS MANAGEMENT

TAL / Risk Academy

Today's webinar

Over the last three months, we have had to adopt new processes to manage businesses virtually.

This has been difficult but has also opened new opportunities.

Today we want to share adviser stories on strategies to continue to be successful virtually.



Adviser landscape



RG 244.94 – “The *Corporations Act* is neutral about technology. This means that you can give factual information and advice by telephone, email, internet, video conferencing or face-to-face, or in any combination of these or other ways.”

RG 244.95 – “The way we regulate advice is the same, regardless of the way that you deliver the advice.”



Advice Case Studies

Providing advice virtually

Tyson Jonas

Tyson founded Jonas Wealth Management in 2017. Transitioned to provide virtual options over 18-months ago.



What tools and equipment do you use to help provide advice virtually?

What do you see as the biggest hurdle for advisers providing advice virtually and how can they overcome this?

If you could provide three tips to those on the session today, what would they be?

Jason Poole

Managing Director at GPA Matrix and founder of Client First Advisors. Based in Newcastle with over half of his clients in Sydney.



What tools and equipment do you use to help provide advice virtually?

What do you see as the biggest hurdle for advisers providing advice virtually and how can they overcome this?

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Functionality



They just need to see your screen (doesn't need to be perfect)

- They don't need a webcam
- They don't need audio

How to get clients onboard?

- Talk them through it; get on the phone first
- Warn them about running a file; allowing audio; allowing video; downloading the app

Use of mobile for comfort

- Can use the speaker on your mobile as comfort factor during the call
- Eventually they realise they can turn this off and it all works

Use the whiteboard (and save); annotate on documents

www.clientfirstadvisors.com.au

Tips and traps

<https://www.facebook.com/clientfirstadvisorsau/>



1. Structure the call like any meeting, prepare well
2. Have whatever docs you wish to reference open before starting
3. If you need to take notes have the docs open in the right app e.g. Drawboard. Even without touchscreen you could type
4. Know that they can always see you even if you cannot see yourself
5. Have a practice go
6. Play with all the settings
7. Screen share a lot don't be shy – remember they can always see you!! But you can click away to check something whilst they stay on the shared screen
8. If you can annotate - big wow factor
9. Poor internet connection – consider hotspot or turn of video
10. Close off personal files before the meeting
11. Have the client open on xPlan
12. Understand lighting! And audio, what is in the background?

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Demonstration

Providing advice virtually

Next Steps



Working Remotely

QUICK TIPS AND TOOLS FOR WHEN YOU'RE NOT IN THE OFFICE

Working remotely can offer you and your clients increased flexibility and comfort throughout the financial advice process. To leverage these benefits, it's important that you're set up properly. This flyer outlines some helpful tools and resources.

Communicating with clients

Communication
Collaborate with ease, using platforms for instant messaging and sharing.

- **WhatsApp:** <https://www.whatsapp.com/>
- **Slack:** <https://slack.com/intl/en-us>
- **Microsoft Teams:** <https://teams.microsoft.com/>

Video Conferencing
Add a human element to your meetings by sending up video conferencing. Each of the platforms below have helpful set-up guides available on their websites.

- **Zoom:** <https://zoom.us>
- **Skype:** www.skype.com/en
- **Go to meeting:** www.gotomeeting.com

Be professional by dressing for the occasion, maintaining good lighting, and ensuring your audio is clear.

Managing Teams

There are many digital resources available that can help your business operate remotely. We've listed some functional tools that are simple to use below.

Team Management
Stay on top of projects and deadlines with your team, by using simple board, lists and cards.

- **Trello:** <https://trello.com>
- **Asana:** www.asana.com

Productivity Management
Help your team stay focused, even when they're working remotely.

- **Forest:** <https://www.forestapp.com>
- **Focusmate:** <https://www.focusmate.com>

Cloud storage and collaboration
Keep everything in one place, where you and your team can share large files and update projects at the same time.

- **Google Drive:** www.google.com/drive
- **Dropbox:** www.dropbox.com
- **Google Docs:** <https://docs.google.com/>



Reach out to your TAL Sales Manager for a copy of our Working Remotely Guide.

For additional webinars from Jason, head to clientfirstadvisors.com

Look out for more TAL Risk Academy webinars to support you during this time.

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Access to webinar content

- Today's webinar recording, presentation slides and a CPD assessment quiz will be uploaded to afa.asn.au
- All registrants will receive an email confirming when available
- Get in touch at info@afa.asn.au if you have any questions

Thank you for joining us today