The Living Zoom

Maximizing the strength of your connection

Thriving and surviving in the new era of virtual presenting

Presenting virtually to clients, colleagues and even family members requires adapting and adopting to the new demands of digital meetings. The stakes are high; much of our success depends on our ability to communicate effectively. Yet there's little guidance today for virtual presenters beyond the technical requirements, and audiences are quickly losing patience with flawed and failed meetings.

Join us for a program designed specifically for financial professionals, and discover ways to adjust your setup, setting and speaking so that you can thrive and survive in the new era of virtual presenting.

Welcome to our living Zoom.

Skills to be developed from the presentation

Attendees are shown:

- Ways to engage and interact with virtual audiences for a more compelling presentation
- Ways to create a better image with simple adjustment to your background
- Ways to coordinate and sequence the meeting host, moderator, presenter(s) and closer
- Ways to simplify tasks and technology by using checklists similar to those used by airline pilots

Program toolbox: from principles to practice

- A research-based checklist for the virtual setup, setting and speaking

Research highlights

- The 6-minute changeup: Keeping audiences engaged is more challenging in the virtual setting. Presenters need to "change gears" every six minutes to keep the participants' attention.
- Engaging participants early-on is essential to keeping them engaged throughout the presentation.
- The preferable backgrounds have quickly changed from "professional" to "personal."

Presenters

Scott West
Co-Head of Invesco Global Consulting

Gary DeMoss
Director of Invesco Global Consulting

Lisa Kueng
Director of Creative Campaigns

Brett Van Bortel
Director of Consulting Services

Maura Scherer
Director of Creative Campaigns

Rob Kochel
Vice President, Invesco Global Consulting

Based on

- What IGC has learned from delivering over one hundred virtual presentations in the "new normal"
- IGC's work with Cheryl McPhilimy, Instructor, School of Communications, Loyola University
- IGC's work with Maslansky + Partners, communication specialist on the emotional response to language

I•GC Invesco Global Consulting

Greater Possibilities Together

Dedicated to helping you and your clients get more out of life

Invesco

Your team

We're here to partner with you directly and offer access to any of these important resources.

Contact us

National Wirehouse
1-800-998-4246

Independent and Broker Dealer
1-800-421-0807

Registered Investment Advisor (RIA)
1-800-421-4023

Retirement
1-800-370-1519

Insurance/Third Party
1-800-410-4246

Addressing your unique needs

Your businesses and clients demand more from you now than ever before. You face increased pressures to maintain or grow your business and build effective portfolios and investment plans, all while sustaining a high level of client service. Invesco can work to help deliver support in three key areas:

01

YOUR BUSINESS

Financial professional practices have become more sophisticated and complex, and you need to spend more time managing and leading your practice and/or team. Invesco Global Consulting can work to help you:

+ **Grow** your business through new client acquisition strategies.
+ **Keep** clients by implementing an enhanced service model.
+ **Optimize** your practice model and team performance.

02

YOUR CLIENTS

The 24-hour news cycle has exacerbated investors' natural inclination to act on short-term events. Our engaging, easy-to-use, and outcome-focused tools and resources are designed to help you:

+ **Understand and inform** your clients to the global markets and the principles that hold true in almost any market environment.
+ **Enhance the financial literacy** of your clients and their families so that they recognize the knowledge gaps and behavioral biases that could derail fthem from achieving their long-term goals.
+ **Communicate across generations** to identify shared wealth goals and the value of a continuing, consistent relationship with you.

03

YOUR PORTFOLIOS

As investment options and tools for evaluating portfolios grow more diverse and sophisticated, you must continuously hone your investment expertise. Invesco Investment Solutions can work to help you:

+ **Evaluate** the merits of various strategies, asset classes and investment vehicles.
+ **Build** client-first investment plans and outcome-oriented portfolios.
+ **Analyze and adapt** portfolios to help ensure their effectiveness.
+ **Assess** the market and economic cycles and **identify** opportunities.

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