

Web Meetings that Wow Format Overview

Section 1: Introduction (*Provide a quick overview of the entire web meeting.*)

Section 2: Body (*Discuss each topic through slides, discussions or screen share.*)

Section 3: Conclusion and Action Steps (*Recap of the meeting and next steps.*)

SECTION 1: INTRODUCTION

The introduction may include a title page, goals of meeting, current situation, agenda and guidelines for focused participation. This section is conducted by the host/presenter of the meeting and should take 2-3 minutes to complete.

AUDIENCE DESCRIPTION

Before you begin developing your content, think about your audience. Who are they? What is their level of expertise?

Briefly describe the audience for your web meeting: Include titles, level of topic knowledge, etc.

TITLE PAGE

List the web meeting topic, your name (and the names of all of presenters, titles and company if applicable).

Example: "Hi, I'm **Sarah Smith, VP of Commercial Lending**, and for the next 45 minutes I will discuss **Financial Incentives** for your **Commercial Real Estate Development projects**."

Title Page _____

GOALS OF MEETING

State the overall goals/attendee benefits of the entire meeting. What is the attendees' goal of the meeting?

Example: "By the end of this meeting, you will be able to identify the **most cost-efficient financial packages** available to your clients. You'll have current information to get your clients' **projects up and running quickly** while **maximizing their project's rate of return**."

Goals:

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CURRENT SITUATION LEADING TO MEETING

Identify the business challenges or hurdles your attendees are facing as it relates to your topic. These may be things that they need, want or have no control over.

Example: "Many of you work with real estate **developers looking for project funding**. There are **many resources available**. It's a quickly changing financial environment. **Tax laws and rates change**. Yet, you **need accurate, up-to-date information**."

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AGENDA FOR MEETING

State the length of the meeting and the two key topics you will discuss. Agenda topics are a high-level overview of the topics you will discuss. For an actual meeting, you may expand this section as needed (recommend no more than 2-5 agenda topics for a full-length meeting).

Example: “In the next 45 minutes, I will discuss two agenda topics. First, I will discuss **Erie County Bank’s financial services**. This discussion will take **15 minutes**. Next, I will spend **15 minutes** discussing the **legal services** Erie County Bank has to offer.”

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GUIDELINES FOR FOCUSED PARTICIPATION

State your expectations for the audience’s focus and participation. Your guidelines may vary.

Example: “Before we begin, I’d like to review a few guidelines to help you get the most out of this meeting.”

1. **Introductions:** Introduce presenter(s), the timekeeper, note taker and producer if applicable.
2. **Recording/Mute:** Explain how to mute phones. Tell them if you are recording the meeting.
3. **Questions:** Tell them how you will address their questions.
4. **Technical Difficulties:** Tell attendees how to handle technical difficulties.

SECTION 2: BODY OF MEETING

This section represents the body of your meeting. In the body of your web meeting, you will expand upon your agenda topics.

RESTATE AGENDA TOPIC #1

Provide concise supporting data for agenda topic #1 by using bullet points, pictures, graphs, diagrams, examples, analogies or references. Each bullet point will be referenced as a talking point to provide more detailed information during your meeting. For a full-length web meeting, you may add as many slides as needed to cover your topic. **For some meetings, you will not use slides but will share your desktop for open discussion.**

Example: “Now we will discuss Erie County Bank’s financial services. First, we can help you **identify financing and funding sources**. Our extensive team of experienced investment bankers will identify sources such as **bonds, capital ventures and governmental programs**.”

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RESTATE AGENDA TOPIC #2

Provide concise supporting data for agenda topic #2 by using bullet points, pictures, graphs, diagrams, examples, analogies or references. Each bullet point will be referenced as a talking point to provide more detailed information during your meeting. For a full-length web meeting, you may add as many slides as needed to cover your topic. **For some meetings, you will not use slides but will share your desktop for open discussion.**

Example: “Now I will discuss the legal services Erie County Bank has to offer. We provide **full service tax guidance** that includes **advice on taxation involving LLCs, S Corporations and flow-through entities**.”

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SECTION 3: CONCLUSION AND NEXT STEPS

CONCLUSION

Restate the agenda topics and goals of the meeting.

Example: "In the last 45 minutes, I discussed 2 agenda topics: **Erie County Bank's financial services** and **legal services**. The benefit of this information to you is that now you will be able to quickly identify the **most cost-efficient financial packages** available to your clients. You'll have current information to get your clients' **projects up and running quickly** while **maximizing their rate of return.**"

Agenda Topics (from page 2):

Goals (from page 1):

- | | |
|----------|----------|
| 1. _____ | 1. _____ |
| 2. _____ | 2. _____ |
| 3. _____ | 3. _____ |

NEXT STEPS

Answer the question, "What do I want the attendees to do next?" Will you request a commitment, signature or follow-up meeting with timeframes? Remember the last slide stays on attendees' screens during the questions and answers. Provide contact information as needed.

Example: "We are excited to help you structure your clients' commercial projects. Let's **arrange a meeting** for **December 2nd**. We will **include your CFO** and **our Sr. VP of Commercial Loans.**"

Next Steps:

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