

VIRTUAL MEETING GUIDE

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Top 10 Virtual Meeting Best Practices

1. Prepare Thoroughly in Advance

- + Conduct at least two in-character dry runs using the actual meeting platform
- + Confirm agenda, technology, and presenter roles
- + Practice screen sharing and transitions with both the lead and backup presenters

2. Test and Optimize Your Technology

- + Perform an internet speed test (ideal: 40–100 Mbps)
- + Use a wired connection if possible for stability
- + Download the presentation to your desktop as a backup

3. Set Up a Professional Environment

- + Use a clean, well-lit space with minimal distractions
- + Position your camera at eye level and ensure your face is well-lit
- + Avoid sitting with a window behind you and keep backgrounds tidy or use approved virtual backgrounds

4. Use Approved Virtual Backgrounds

- + Internal attendees should use the Evernorth-branded background with name and title
- + Position yourself in the center of the screen to accommodate text placement

5. Dress Professionally

- + Dress as if attending an in-person meeting
- + Choose solid, neutral, or jewel tones and avoid busy patterns

6. Engage Actively During the Meeting

- + Keep your camera on to build connection and accountability
- + Nod, smile, and use facial expressions to show attentiveness
- + Ask open-ended questions and pause to encourage dialogue

7. Minimize Distractions

- + Silence your phone, log out of email and IM, and close unnecessary applications
- + Mute yourself when not speaking to reduce background noise

8. Coordinate Internally

- + Use group text sparingly for quick communication
- + Designate a note taker and a point person to field questions

9. Adapt to Client Technology

- + If using client platforms (Zoom, Teams, etc.), test access and functionality ahead of time
- + Prefer dial-in audio for better clarity and reliability

10. Follow Up Post-Meeting

- + End the meeting professionally and summarize key points
- + Schedule a debrief with the team and document follow-up items

Sales Team meeting checklist

Week of meeting	
	Email and confirm final agenda items and technology
	Send presenter invite blocking calendars for 15 minutes before and after meeting
	Review prep session and meeting logistics with the presentation team
	Designate main presenter and an alternate host to advance presentation, toggle screens and pass the ball. The alternate host can take over in the event of technical challenges.
	Confirm with consultant/client/prospect who will lead and who to pass the ball to
	Conduct prep meetings using the technology that will be used for the actual finalist meeting
	In prep meeting have the attendee who will be sharing their screen during the meeting practice "driving" to get a feel for transitions, also take a moment to have the technology back-up practice screen sharing in the event they would need to take over
Day before meeting	
	Convert materials to PDF and send in advance of meeting - Confirm how materials will be shared and who will drive the presentation - Include presenter bios
	Confirm final attendee list via accept/decline
	Test WebEx or client/prospect technology during final in-character dry run with presentation team - Decide and practice order of introductions and who will kick off the meeting - Practice presenter transitions, including pausing for questions - Practice talk track, and potential questions - Determine note taker for follow up items - Designate point person to field questions, internal attendees should only speak during their section or when the meeting lead fields a question to them
	Review virtual meeting best practices and determine your broadcast setup
Day of meeting	
	Download a copy of the presentation to your desktop in case you need to act as the host or if you lose your connection to the Webex/clients' technology you still have your slides available
	Turn cell phone on silent
	Logout of email and IM to avoid pop-ups
	Close all other applications besides presentation and material needed for meeting
	Mute your line when if not speaking
	If driving meeting technology: log into meeting with internal team 10-15 minutes early to test volume, video, discuss final logistics, including transitions and practice "passing the ball". Shut down any applications or tabs that are not needed for the meeting to minimize distractions and potential privacy concerns. - When testing audio, be prepared with a back-up headset, land line or to hang up and redial if your audio is not clear - Promote interaction and think about how to handle the potential for lag time and long pauses - Be prepared with an abbreviated version of your talk track - Wait 3-5 minutes to begin meeting so all participants can join - Start with a brief virtual icebreaker and/or lead introductions by running down the attendee list - Ask open ended questions to encourage engagement - Pause to check in with audience to promote dialogue
	If consultant/client/prospect is driving meeting technology: log into meeting early, reconfirm in advance how materials will be shared and who will drive the presentation
	Make sure to speak clearly and deliberately; avoid speaker phone when possible

	Post meeting
	Sales director/Account executive/Meeting lead/Consultant Relations to close meeting with meeting synopsis and list follow up items for approval
	If driving meeting technology: end WebEx meeting (turn off technology and close camera)
	Schedule/host debrief with the presentation team

Virtual meeting best practices

- + When you get notification of finalist, ask the consultant/client/prospect if you own the meetings invite. This can help ensure that we use our own technology
- + Confirm in advance with the consultant if the consultant/prospect/client will be using video
- + Coordinate a designated back up who can pull up the deck should the main presenter run into connection issues. Encourage the rest of the team to save the PDF version to their desktop as a failsafe.
- + Pause for questions or comments to keep participants engaged
- + If possible, consider hardwiring into your modem for a stronger internet connection
- + Use a group text message to communicate with internal presenters; this can be distracting so use sparingly. It is recommended to not use the internal IM chat when in a meeting.
- + For longer meetings (2+ hours) discuss with the team if it is appropriate for presenters to toggle video on and off. This can cut down on video fatigue and allow presenters to relax and not forget that they are on camera. Practice this during prep.
- + All preps and dry runs should be hosted in the platform being used in the virtual meeting
- + Conduct at least two in-character dry runs with the full presenting team
- + In the dry runs have both the technology lead and technology back-up practice screen sharing to ensure there are no issues and the full presentation is being shared
- + Connecting via phone audio is preferred – mobile networks provide clearer audio than computer microphones
- + For streaming video and audio 40-100 Mbps is ideal
- + Perform internet speed test ahead of meeting, the internet speed test measures the speed of your internet connection. Your connection speed includes things like download speed and upload speed.

How to test your internet download and upload speed:

1. Go to Google
2. Search for **internet speed test**
3. Tap or click Run Speed Test

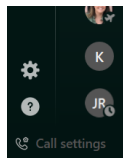
If you are having any issues utilize back up plan as needed. Work with your designated meeting lead as needed to troubleshoot prior to meeting.

Virtual background

- + All internal virtual attendees should utilize a background with their name and title
- + Center yourself on screen to align name and title in the virtual background

How to set your virtual background in WebEx:

1. Save your custom .jpg to your desktop
2. From WebEx messenger, navigate to the wheel icon on the bottom left of your



a.



3. Select "Video" (third from the top) à then select "Background" which will appear directly under "Video" once you click it
4. Click "+ Add" icon and navigate to where you saved your .jpg and upload
5. The new background will appear as an option, select it and "save"
6. Background will automatically display until you turn it off

Please note, the background will appear reversed on your screen. This is intentional as it's as if you were looking in a mirror. Your audience will see it normally

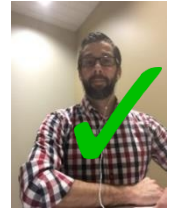
How to set your virtual background in Microsoft Teams:

1. Save the attached to your desktop
2. Once inside Teams meeting, navigate to meeting controls, select '*** More' icon - > 'background effects'
3. Upload your background:
 - Select "^ Add new icon"
 - Navigate to desktop and select your .jpg file -> select 'open'
 - Navigate to the bottom of your options and you will see the background as an option
 - Select background and choose 'apply'
 - Background will now be viewable within your video box
4. You can close out of the 'background effects'

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Camera and lighting positioning

- + Do not sit with a window right behind you
- + Sit where there's enough light to see your face
- + Place your camera at eye level to create a natural and engaging angle, your shoulders and upper chest should be visible – avoid extreme close-ups
- + Sit where there's a clean background behind you, consider camera angle and other factors in your environment (i.e. ceiling fan/light fixture, artwork etc.). See above for instructions on using the virtual background.
- + Keep the area clear of papers and any company information in the background
- + Look towards your laptop's webcam
- + Clean your camera lens regularly for a clear image



Attire guide

- + Dress professionally and confirm the meeting dress code with your sales lead
- + Solid colors work great on camera
- + Avoid busy patterns, small/tight stripes, or overly bright colors
- + Solid, neutral, or jewel tones (like navy, burgundy, or emerald look great on camera)
- + Make sure collars, buttons, and necklines are neat and professional



GOOD: Neutrals, blues, solids and/or subtle patterns.

Helpful tips to keep in mind:

- + Choose a quiet, well-lit space
- + Minimize distractions (notifications, pets, background noise)
- + Behave as though you are in an in-person meeting
- + Show up as a unified team
- + Keep eye contact with the camera
- + Speak with a strong, clear voice
- + Designate a note taker to jot down questions and follow-up items
- + In a hybrid setting have a virtual attendee share the presentation, to avoid wasting time at top of meeting getting connected in-person
- + Engage with your audience and ask questions to keep conversation flowing
- + Have your materials prepared and ready
- + Be present and engaged – keep your camera on if possible, it builds connection and accountability

- + Nod, smile, and use facial expressions to show you're listening
- + Mute when not speaking, this helps to reduce background noise and keeps the meeting focused
- + Watch your body language – sit up straight, avoid fidgeting, and maintain eye contact with the camera
- + Speak clearly and concisely – pause occasionally to allow others to respond or ask questions