

## The Glaring Problem with Zoom Meetings

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by Beverly Flaxington

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*Dear Bev,*

*In these times of separation from team members, my advisors are not coming forward with ideas or complaints like they did when we were in the office together. We have a cohesive and engaged group and often, when in person, someone stops in to see me and make suggestions or talk about a client issue. We're having virtual meetings. I insist everyone is on camera so we are seeing one another, but the ideas don't flow. Everyone wants to get off of the meeting as quickly as possible. When I ask for input, I get crickets. I asked one of my senior advisors what's going on and she said, "We're distracted and busy. No one has time for new insights right now."*



*This concerns me. What if we stay virtual for another year or even longer? What if only some of us return to the office? I have read articles about people being distracted at home, but we are senior professionals in a business serving clients! Our excuse cannot be that we are unable to make improvements during these times.*

*I'm stymied with how to get us back to the engagement we had in person. I don't want to punish anyone. But I won't go for another several months like this. Any ideas on how to get us back to where we were before this all started?*

*J.I.*

Dear J.I.,

Let's talk reasonable expectations – get you back to where you were in what way exactly? It sounds as if you had a nice, open-door culture where advisors felt free to drop in and make suggestions or share ideas in a casual and personal way. That behavior is very hard to replicate virtually.

Did you depend on those ideas to make changes? Was there any rigor around taking the ideas and insights and implementing them? Would their comments be brought up at a future meeting? Or do you miss the camaraderie and engagement because this energized and motivated you? Is it truly an issue for the firm to improve or is it more about you learning a lot and now being disconnected from what advisors are thinking and feeling?

I don't ask because one is right and the other wrong, I ask because I encourage people to make sure they are solving the right problem. In this virtual world, many leaders feel cut off from their teams and are having a hard time gauging what team members are experiencing. It can be very unsettling to leaders. But it might not be hard on the rest of the firm or even the clients. It's important to identify what, exactly, is getting missed.

Let's assume for purposes of this response you really do need the input, and that there is a decrease in service or growth to the firm from the lack of engagement.

In other words, it's not that you just miss out on interaction.

If so, reconnect with your team around the vision and values of your firm. You could organize a virtual session, whereby you explore what your firm's vision means and how it applies in the day-to-day work that you all do. If the values include learning from one another, sharing new ideas and improving the firm based on team member input, then this needs to be reconfirmed and agreed to. Then, you need to explore how you live this value out while in a virtual environment. You can ask everyone as a group if they care about this aspect for the firm. If the answer is "yes," what you can do as leader and facilitator to gain input and engagement from them?

If people are distracted and too busy, ask them what could happen to help them carve out time to explore new ideas. Again, connecting the conversation back to the vision for the firm, the values that everyone has agreed upon and the important daily activities might help team members to see they must find ways to participate.

Ultimately this is about confirming the vision and reminding people what the firm stands for and what matters to everyone.

*Dear Bev,*

*We are having many technical difficulties lately. Our systems seem to be shutting down more often than not. We will be having a WebEx with a client and then all goes dark and our phone lines have gone down. We are scrambling to upgrade technology and work with outside vendors to help us in a pinch. I know there isn't a lot else we can do to stop the difficulties from happening, but is there something we should do in communicating to our clients or apologizing for the inconvenience? You might think we don't have to worry about it, given most people are experiencing their own problems. But our clients are very large in AUM and on a couple of occasions we have received the comment, "I would think you would have paid for a better system with the money we are paying you!"*

*T.D.*

Dear T.D.,

Ouch! How frustrating for you – trying to do the best you can, having the technology fail you and clients holding you responsible despite your best efforts.

Now that you have had the experience more than one or two times, set expectations differently with clients. If you know something could be a problem, own it up front and take away the objections (an effective sales technique that applies here). Schedule these meetings with clients, and possibly via email or in conversation if you are speaking with them, say something like, "We have invested in our technology and phone system but have found with the overload on systems everywhere that from time to time the technology lets us down. I'm expecting (or hoping) this won't be the case for our conversation but wanted to let you know in advance in case anything happens. We value our relationship with you and miss the in-person connection and want this virtual experience to be the best, but some things are out of our control. Know we are doing our best."

If you take away the objection up front, and you let them know what could possibly happen, you might find that if it happens, they are expecting it and then they join you on your side of the table. They might be more likely to accept it, or even laugh about it with you – maybe they will even say, "You warned us this might happen, Ted!"

*Beverly Flaxington co-founded The Collaborative, a consulting firm devoted to business building for the financial services industry in 1995. The firm also founded and manages the Advisors Sales Academy. She is currently an adjunct professor at Suffolk University teaching undergraduate and graduate students Entrepreneurship and Leading Teams. Beverly is a Certified Professional Behavioral Analyst (CPBA) and Certified Professional Values Analyst (CPVA).*

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