12 Clever Areas of Use for Online Meeting Software

How to adapt online meeting software for everyday functions in several industries

A detailed guide for any user of online meeting software to:

1. Increase their ROI on their software purchase
2. Gain insights into how online meetings can be creatively used in several industries
3. Create new ways to bolster your value proposition to others via online meetings

Table of Contents

Page

Executive Summary

The purpose of this white paper is to demonstrate how online meeting software can be adapted for everyday use. Many professionals across several industries use it for generic meetings, however there are many everyday situations in which online meeting technology can be a far more personal and effective method of communication than just a simple phone call or email. This white paper goes over instances where online collaboration software enhances day-to-day business and professional interactions, which in turn boosts the ROI on your software purchase.

Who is this White Paper for?

This white paper is for corporate trainers, software sales personnel, financial advisors, banking professionals, public relations advisors, customer support representatives, and more. Its purpose is to show the ***many creative ways*** online meeting software can be adapted, and how it is valuable for professionals in several industries. This white paper will give them:

- Concrete ways that online meeting software can enhance productivity,
- Real-world instances that are in fact "online meetings" and how this is of benefit,
- Opportunities for offering more value in their interactions,
- Contextual information for thinking about new ways in which online meetings can be adapted in their space.

What to Expect in this White Paper?

Use of online meeting technology does not have to be limited to just general meetings. When used creatively, screen sharing can be a tremendous asset for helping you save time, increase productivity, and strengthen the value your company offers in your interactions with others.

In this white paper, we cover twelve real-world situations in which an online meeting space can be used for more effective and convenient communication with colleagues, clients, and other professionals. Whether you are well-acquainted with online meeting software and its advantages or new to its use, these user applications can be helpful in coming up with new ways to adapt this powerful resource for your own business operations.

12 Clever Areas of Use

for Online Meeting Software

1. Project Management Status Update

In many organizations today, a project management system's value cannot be overstated. A project management system will keep a team on track and focused on the tasks-at-hand. It is great for ensuring the work process remains fluid and progress is made on a work project in a timely and efficient manner.

However, there are times when a project requires clarification or a part of it could use further explanation; situations in which more immediate communication than email updates or project management system comments may be more fitting. At times, people could use more in-the-moment feedback or visual demonstration of what's needed or even what the goals are in that case. These situations are likely to arise at some point in a project's completion cycle, no matter what the project's scope and size are.

It's in those situations when a desktop sharing program can be helpful. The project manager can quickly uncover any difficulties or uncertainties that team members are encountering or having. Everyone who's collaborating on a project or task can then be sure they understand what's needed and their roles in the effort. Afterwards, the team leader can re-delegate tasks or milestones as needed.

2. Training New Employees

For many organizations in several industries, conducting job training on-site is no longer a necessity. With an online meeting setting, corporate or organizational trainers and new employees can easily interact while comfortably sitting in front of their computers. In the face of uncertain economic conditions, this approach can be especially valuable. After all,

human resource professionals don't have to worry about dealing with all the variables that come with on-site job training, including location of the training, travel costs, rigorous scheduling, and more. The organization's human resources department then becomes freed up to focus on other organizational priorities and department-related initiatives.

There are multiple benefits to meeting online on the employee side, as well. New employees don't have to worry about planning their own schedule and budgeting for a trip to a training location. There are no specialized requirements for attending the training session, save for having a computer with Internet connectivity and the readiness to learn the ins-and-outs of a new role. On the whole, the whole training process becomes easier and more convenient for new employees, while is seen as an innovative way to conduct training and bring the employees into the company. In turn, that can boost the new employees' morale as well as their excitement about taking on the new position, and strengthen their impressions of their new employer.

💡 Bonus Tip: Keep it Simple

From a concrete standpoint, a desktop sharing program can be very useful in clearly illustrating something new employees need to understand or know how to use. That can include things such as a software program or an in-house resource (e.g. the inner workings and dynamics of a customer relationship management program). Consider using online meeting software that has an easy-to-use screen sharing feature that runs smoothly but isn't over-complicated with unnecessary features. After all, you want to keep it easy for new employees who may not be as technically-minded as you are.

3. Review Financials with Advisor

Online meeting software presents a golden opportunity for financial advisors or wealth planners to establish stronger rapport with their clients. Aside from clearly outlined future goals and financial vehicles to achieve those goals, trust is one of the biggest cornerstones of the financial services industry. Its importance to client relationships cannot be overstated. Many people are intimidated by reports detailing their financial portfolio and their performance, and clients can be overwhelmed at the challenge of navigating financial markets for themselves. In those instances, when a financial services professional is unable to meet someone in person, online meeting

software can be a great alternative for meeting together to discuss the client or prospect's needs while at the same time strengthens the client relationship.

Aside from offering accessibility, there are a few other benefits to meeting online with a client or prospect. A financial advisor can show him or her what is involved with a particular investment strategy or a particular investment option he or she's considering. The financial advisor can make use of visual aids or visual materials to illustrate the investment option's growth potential or level of market viability or risk. The online meeting setting can also be helpful for the financial advisor in other ways. It lets the advisor add value to when he or she engages with clients or prospects: online meeting software can give a financial presentation a more personalized touch than what only a phone call can provide. It also eliminates the challenge of distance and time that would be spent traveling. In turn, that increases the financial advisor's productivity and ability to tend to even more client or prospect needs daily.

4. Software Sales Demo with Prospect

In the software industry, it's imperative to show a potential client the value a particular software solution offers. Sales representatives from the software company show the prospect the software program's features and benefits and how the program can add value to the prospect's business or organization. An on-site demonstration may not always be the most effective vehicle for product showcasing because of all that's involved.

The software sales team and the client prospect have to make sure their schedules line up. Then they need to agree on a date and time, and then there's the traveling to the meeting location on the appointed date. It takes time to coordinate face-to-face meetings, and travel from site-to-site takes up valuable time as well, not to mention the added cost. In contrast, offering to "share your screen" to the client will help in cutting down on those barriers of distance and time spent traveling. Moreover, just about all software demos take place on a computer screen. That drastically reduces the need for an on-site software presentation, and actually makes a screen

sharing meeting ideal.

The online meeting format will be easier for the sales team to orchestrate, and for both the sales team and the prospect to attend. Through the online meeting software's screen sharing feature, the sales team members can easily illustrate the ins-and-outs of their program, as well as its unique selling points. The prospect may be able to demo the product himself or herself with use of the online meeting technology's "switch presenter" feature while the sales representative walks the prospect through the product features. Because they no longer have to travel from site-to-site, the software sales team members can use that extra time to engage more prospects and conduct more online product demos. Their daily productivity will be greatly enhanced.

5. Complete Tax Return with Accountant

Completing a tax return is already a rigorous process. It requires having one's finances in order and making sure everything is organized and prepared. Of course, many people are intimidated by their finances or become unsure about where one component of their finances falls into their tax filing. Online meeting software can offer value to both accountants and their clients, in terms of getting things straight and cutting down on preparation time.

For one, an accountant can use online meeting software to make himself or herself more accessible. Work schedules, family life, and personal obligations can make appointment-setting difficult for clients. Furthermore, clients often have little time to complete their tax returns, as each day they focus on their core business and their own customers. That can make it difficult to schedule a face-to-face appointment with an accountant. When scheduling and distance are proving to be challenging, an accountant can use a desktop sharing program to meet the client online and go over his or her financials. It can also be useful in delivering peace of mind to the client— the accountant can quickly explain figures he or she came up with and confirm they are correct. He or she can also explain what's involved with a particular segment of a tax return with a client, such as things that may be legitimately claimed as deductibles. With reduced client concerns about the final tax return figures and fewer amounts of travel distance or time involved, an accountant will also increase his or her daily productivity.
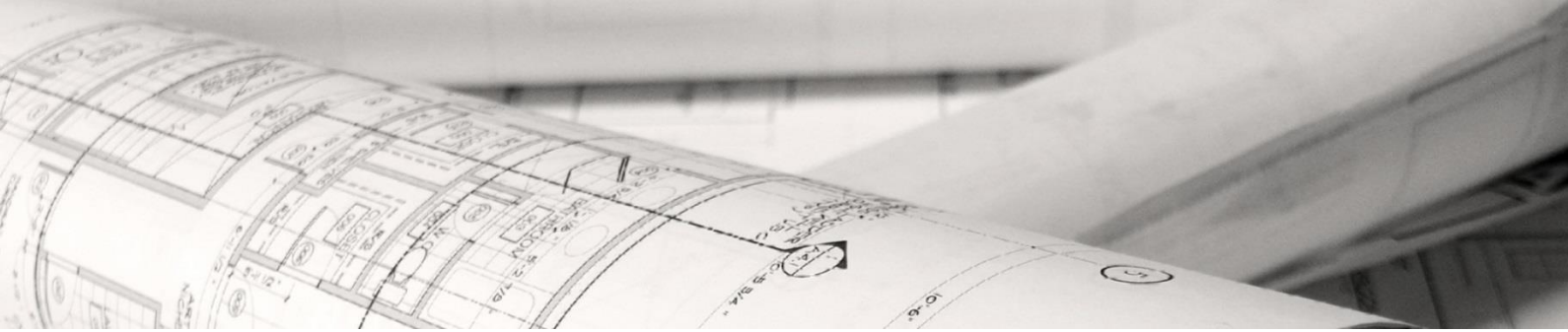
6. Review CAD Software Drawings between Architect and Client

One area of application for screen sharing software which is tremendously valuable is when used in by architects in their communications with their clientele. Today's CAD programs are highly complex and can involve 3-D components that are not easily conveyed in print materials. Creating and sending large design prints over to a client and then waiting for client feedback can be a time-consuming process.

Online meeting software can take the guesswork out of 3-D renderings and reduce those long time windows for communication between architect and client. Architects can use an online meeting program to show a client their designs within a CAD program. The client will then have a more comprehensive understanding of the project and can offer immediate feedback at that time. As a result, the client will be more up-to-date as to where the project stands, and the timing for the whole project can be shortened.

7. Present Web Design Concepts to Client

In any service provider-client relationship, easy communication and accessibility will add value. In the field of web design, this "professional chestnut" is definitely true. As creative professionals, web designers might be dealing with a large volume of website projects, and of course the client organizations are busy with priorities of their own. Project updates, new design mockups, and client feedback on the new mockups or progress that's been made tend to be communicated in email-after-email.

For both web designers and clients, online collaboration software can be of great benefit. Strategically timed online meetings, in which multiple client representatives attend, can be productive for the entire process. It lets the designer explain his or her work and obtain timely feedback from the client representatives. On the client side, multiple people can offer feedback at the same time, instead of one bit at a time in a series of long email chains. With the client representatives' feedback in real-time, the designer can make

adjustments there and then as the client representatives see the changes being made, just as if they were sitting next to the designer. Because of the timeliness and input from multiple people with this "meeting approach", a design project can be finished in a more efficient and economical fashion.

8. Update Software Company Employees on Latest Product Release

The software industry is a quick-paced one, as it is full of frequent release cycles and covers a substantial array of ever-changing product offerings. On the software company level, keeping employees aware of the latest product developments is essential. But company employees are often in many offices in different locations. Bringing them together in one meeting spot for a long product update meeting can be difficult to execute.

An online meeting is definitely a much more time-efficient and easy-to-execute approach, however. You can have multiple employees from different offices in the meeting without leaving their desks, and it becomes much easier to answer questions or inquiries as you can present the product's latest features there and then. Just a brief presentation of the latest product developments, addressing any questions that any employees may have, and then it's time to move onto new tasks for the day. In short, an online meeting tool can make meetings covering the latest product developments much more efficient and much less of a headache for everyone involved.

> ### 💡 Bonus Tip: Use Online Meeting Software to Reduce Costs and Environmental Footprint
>
> There are other upsides to online collaboration besides the ease and convenience of the meeting setting. Online meeting software features, such as file sharing, are invaluable for saving budgeted dollars in areas such as office supply purchases. Meeting in person often involves printing piles of materials to hand out to each meeting attendee. However this can be easily avoided when you're able to share documents with your colleagues online. Consider sending such materials via the software file sharing feature to cut back on expenses and to reduce your organization's environmental impact. A further advantage of file sharing via an online meeting is that you can distribute the required files to your employees all at once there and then during the meeting, rather than waiting till later and sending out emails.

9. Banking and Financial Consultancy with Clients

Banking professionals can leverage online meeting software for their own daily activities. This applies to a bank's financial managers, loan officers, analysts, and more. They can use a collaboration tool for shoring up existing clientele, advising on financial investment opportunities, handling client concerns, or illustrating answers to any questions a client may have. Online meeting software also offers a dimension of personal interaction that a phone call does not provide while building trust with the client over discussions of a private and sensitive matter i.e. money.

Sometimes clients will have questions for a bank's financial manager about a financial product or service they are considering. When the scheduling and timing demands of a face-to-face meeting prove inconvenient, an online meeting can be a solid alternative for banking representatives and clients. In those instances, the bank's financial professional can illustrate the advantages and downsides of a particular financial product or service. He or she can go over other proximate financial products or services that may be good alternatives. Meeting online can be useful for fielding client frustrations, as well. For instance, if a client has a question about charges on a credit card statement or a delay on a business deposit, an online meeting can show the banking professional the item-of-interest the client is referencing.

10. Review Press Release with PR Consultant

In the fast-paced world of corporate communications, quick and efficient communication with a PR consultant about critical public relations materials such as press releases is a must. Press releases are timely conveyors of company information or new company developments, and they will be competing with thousands of other press releases for media attention. In other words, how your press release is crafted and what it communicates are of the utmost importance.

Whether your press release stands out, in actuality, can come down to just a few words in the headline or sub-headline. It's easy to become caught up in

a few short phrases or a few words. In those instances, it's time-consuming and unproductive for an organization and a PR advisor to send updated copies of the same press release over and over again to one other. In an online meeting setting, both parties can sit down together in a virtual space to quickly clarify and agree on how things need to be communicated. They can then quickly make any changes as needed. In the instances when press materials are very time-sensitive, online meeting software can especially be a tremendous help.

💡 Bonus Tip: Use the File Sharing Feature to Save Time

Again, the file sharing feature can be invaluable in situations where rapid input on a press release or a corporate communications piece is needed. Screen sharing can be valuable for crafting press releases in a timely manner, but also can apply to other communications materials or documents as well. In cases where timely and efficient feedback is needed, consider using the file sharing option of the screen sharing software to shorten the window for making sure communications materials are ready to be released. After you and your fellow collaborator have agreed on changes needed and saved them in the document, you can use the file sharing feature to immediately send the updated copy to the other party.

11. Customer Support Call Center

Customer support over the phone is often a difficult process for both the customer and the professional in the support role. Tensions can quickly rise when progress isn't being made. On top of that, customer support is a key component of any business, as it is a strong representation of the company's commitment to customer needs, from the customer's perspective. That is true whether a company keeps its customer support operations in-house or outsources them to a third-party provider.

Using online meeting software can be valuable particularly when a customer is facing technical challenges on his or her end. Such scenarios can include difficulty with the product in question or having trouble with setting up a user account. By meeting online, any technical challenges on the customer's side can be quickly identified and overcome. In turn, fast and efficient customer support will boost consumer confidence in an organization as a whole. Customer support representatives will also be more efficient in their daily job responsibilities, as well. A professional, efficient customer support

process can translate into stronger company performance, too. Having clear and effective customer support in place will do wonders for a company's image and for keeping a steady loyal customer base.

> 💡 **Bonus Tip: Think outside the Box**
>
> Customer support via screen sharing should not be limited to IT problems. There are a wide range of customer support call center scenarios which can be enhanced via online collaboration, resulting in the problems being resolved faster and greater customer satisfaction. Examples include:
>
> - utility companies walking customers through their online accounts,
> - online retailers assisting customers with their purchase enquiries,
> - real estate agents helping tenants complete their application forms,
> - etc.

12. Share Possible Candidate Profiles with Client (Employment Agency)

For employment agencies, being able to discuss various possible candidates with a client organization in real-time can be valuable. Organizations looking to fill positions within their ranks are already inundated with emails about possible candidates that could be good fits. There's no guarantee the client's human resources department will review yet another email detailing more possible candidates. After all, human resource professionals are constantly busy dealing with many personnel-related details on a daily basis.

Online meeting software enables an employment agency to take its communications with a client to the next level. Sharing candidate profiles with the client organization doesn't have to be limited to email communications. Now an agency representative can interact with the client by phone and use the meeting software's screen sharing feature to draw attention to key candidate highlights or performance traits. This approach is more personable than just sending an email. Also, with the increased productivity in locating quality candidates, the client organization could lessen the time it spends looking for new candidates and making new hires.

Closing Thoughts

These are just a few concrete instances in which online meeting software can be leveraged for greater gains. Whether someone is interacting with colleagues, clients, or professionals from another company, there are many ways in which an online meeting can offer value besides the generic meeting application model. By providing that extra dimension of personalized interaction and more real-time opportunities for discussing work progress, a project, or something requiring feedback, an online meeting user can add value in his or her interactions with co-workers, clients, professional colleagues from other organizations, and more.

Because of its ease of use and intuitive features, Mikogo offers a powerful solution for professionals looking to capitalize on the benefits of meeting online. With its wide array of user features and easy-to-understand software user interface, this desktop sharing program represents an effective resource for taking your professional interactions to the next level — even in your daily activities.

About Mikogo

You may have seen that screen sharing and online meetings were mentioned a couple of times in this white paper.

Mikogo is an online meeting software tool with an easy-to-understand screen sharing capability, as well as multiple other easy-to-use features. Carefully designed to appeal to workers of all technical skill sets, it can be a tremendous asset in relationship-building and collaboration with your remote team.

Used by more than 1 million registered users in over 180 countries, Mikogo's customers consist primarily of small- to medium-sized businesses that use the software for online meetings, web conferencing, remote support and online trainings.

At present, more than 3,000 corporate customers are using the Mikogo technology and benefiting from significantly reduced travel time and travel expenses.

www.mikogo.com