



Tips & Tricks for Virtual Presenting

December 2020

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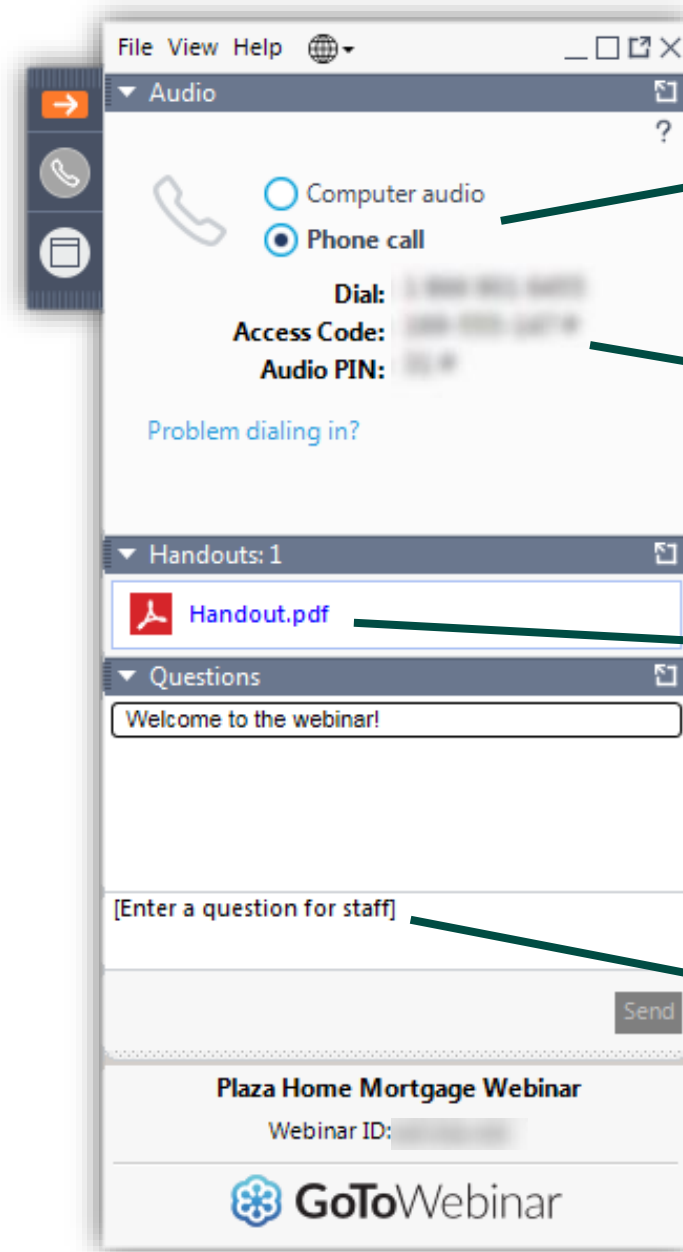


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Use **speakers** or a **telephone** to listen to the audio.

Use the information in **your toolbar** to dial in from your telephone.

Click here to download any **handouts**.

If you have any **questions**, please type them in here. All questions will be addressed, time permitting.

Presenters



Lauren McCalmont
Training Specialist

Ever Felt Like This...?



POLL



How often do you get the opportunity to present?

- Rarely
- Sometimes
- Often
- Frequently
- Very Frequently

POLL



Who do you present to most?

Clients

Internal

Other

Let Me Know!



Ice Breakers



Tell me about yourself

Pick a Team!

Photo Submission

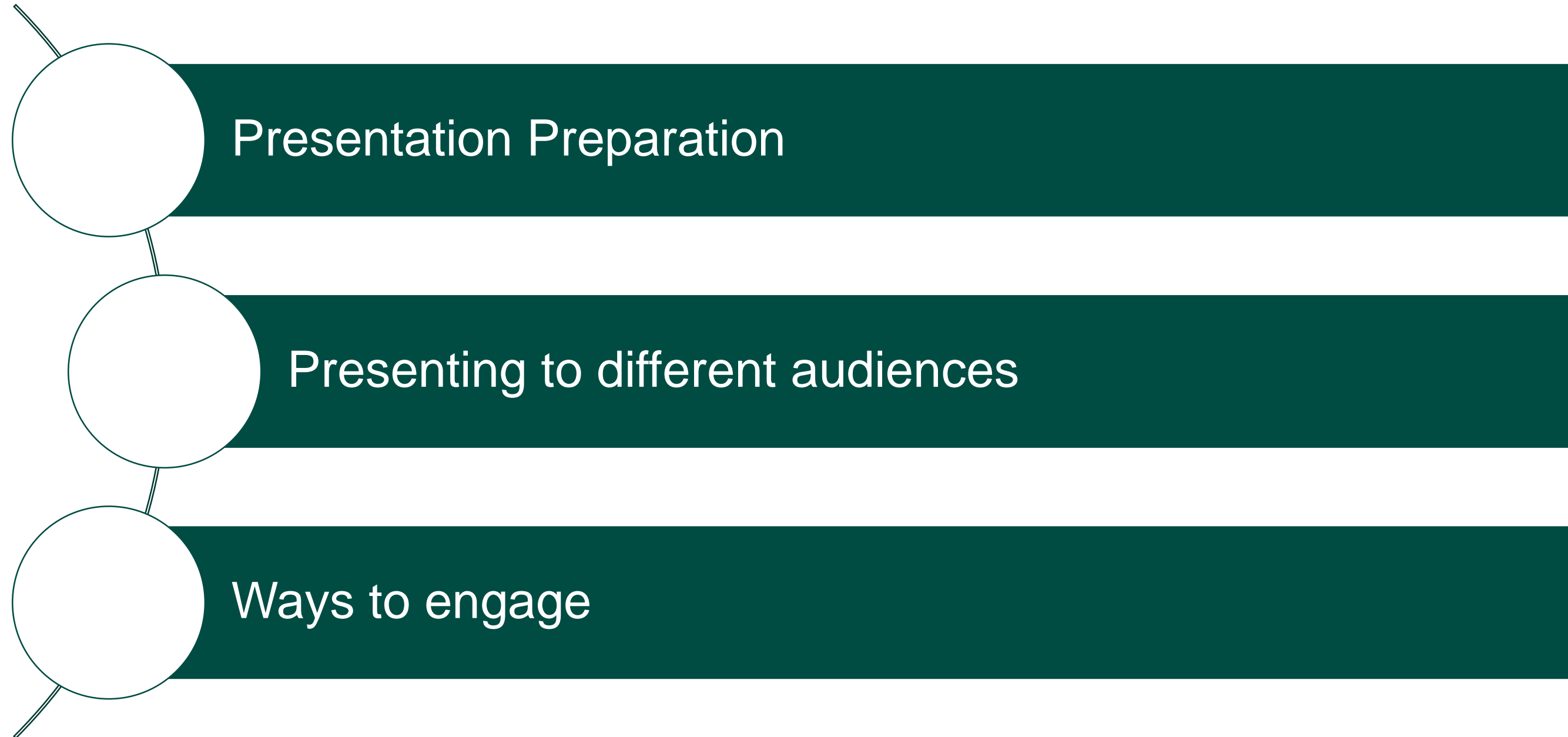
Would You Rather?

What else?

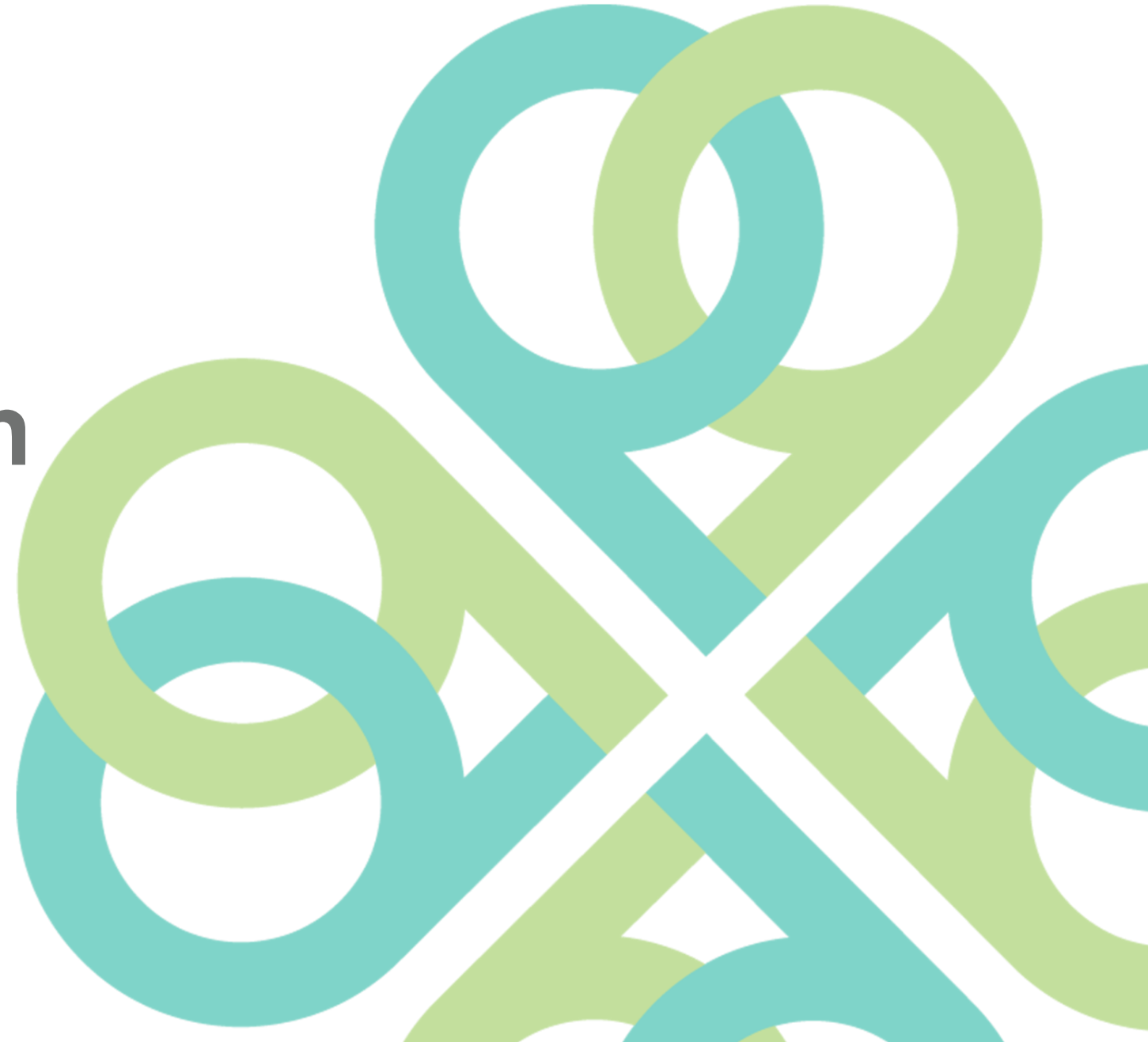
Ask a topic question



Agenda



Presentation Preparation



Session Set Up



Preparation is Key



Prepare YOURSELF

Identify what will set you up for presenting success

- Write a script
- Outline key points/bullets
- Print your slides and notes
- Prep for issues by having multiple back-up plans
- Set up early to avoid technical difficulties
- Be aware of your surroundings if using webcam (keep it professional)
- PRACTICE

Prepare the AUDIENCE

Communicate to your audience for what they can expect:

- High level of participation required (verbal and chatbox)
- You plan to call on people directly (listen for you name and be ready)
- Questions will be answered at the end or throughout the session

Be a Great Co-Presenter



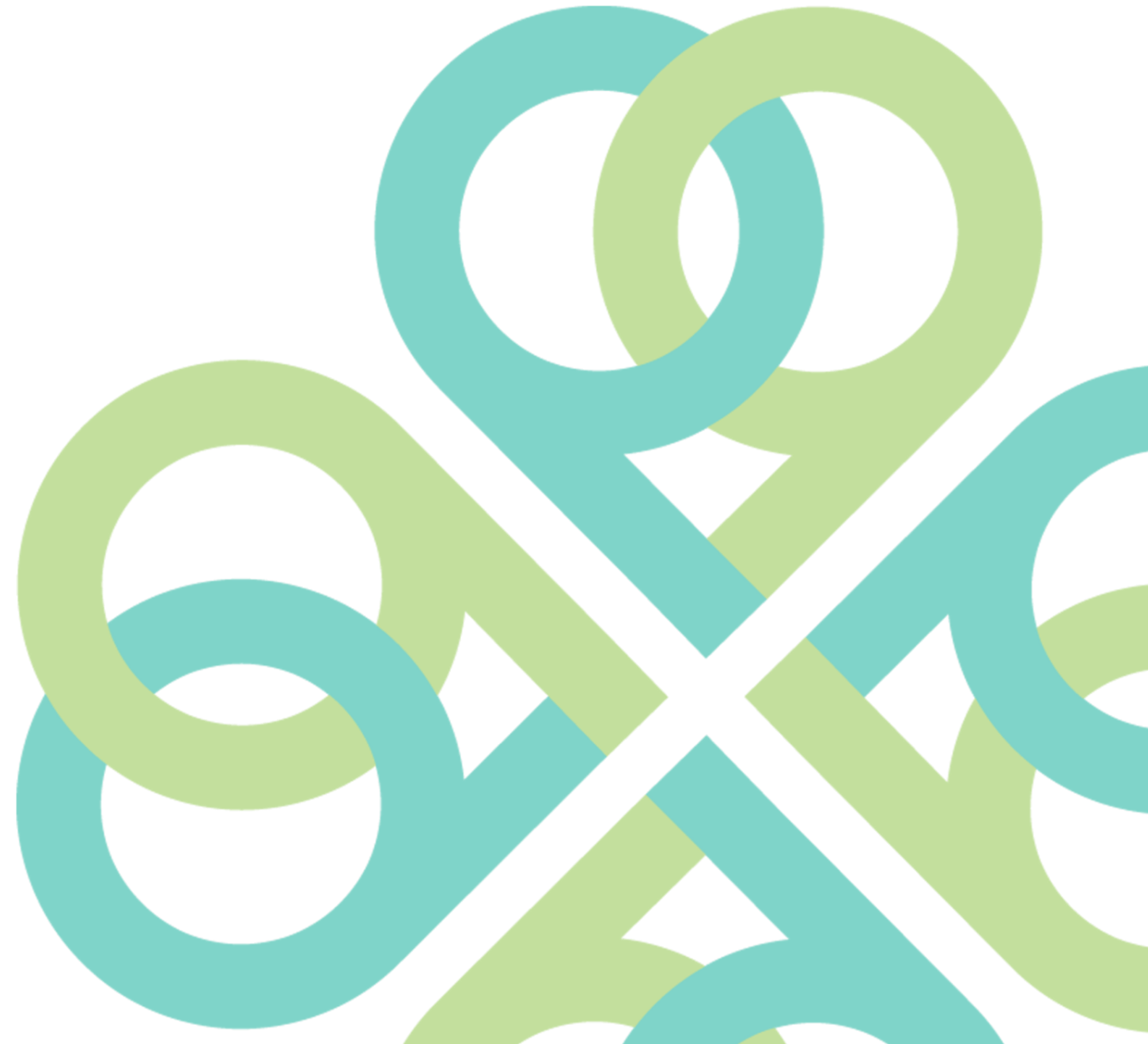
- Prepare hand offs or partner on all slides
- Periodically ask your co-presenter if they have anything to add
- If your audience is quiet, ask your co-presenter for their thoughts on the question or topic

Benefits:

- People like listening to more voices
- Support (back up if needed)
- Multiple perspectives and ideas



Know Your Audience



Which Is It?



External

Internal

External Training – Presenting Style



DOs

- Be professional yet relatable
- Find ways to get the audience involved
- Highlight benefits and exciting features
- Find a point to emphasize
- Make it personal to you or the client
 - I commonly see...
 - We recommend...
 - Share an example scenario you recently worked on

DON'Ts

- Lecture and read guidelines
- Try not to sound overly scripted or stiff
- “Wing it” when presenting – have a plan!
- Move through your information too fast or too slow!

Put yourself in the listeners shoes,
what do you appreciate?
(i.e. level of detail, energy, etc.)

Internal Training – Presenting Style



DOs

- Be friendly and relatable
- Let the audience know how the training applies to them in their role “what’s in it for me”
- Talk with the audience, not at the audience
- Leave room for people to verbally respond, session permitting

DONTs

- Be overly formal
- Forget to keep a mindful pace
- Only wait 2 seconds for people to respond if you pose a question

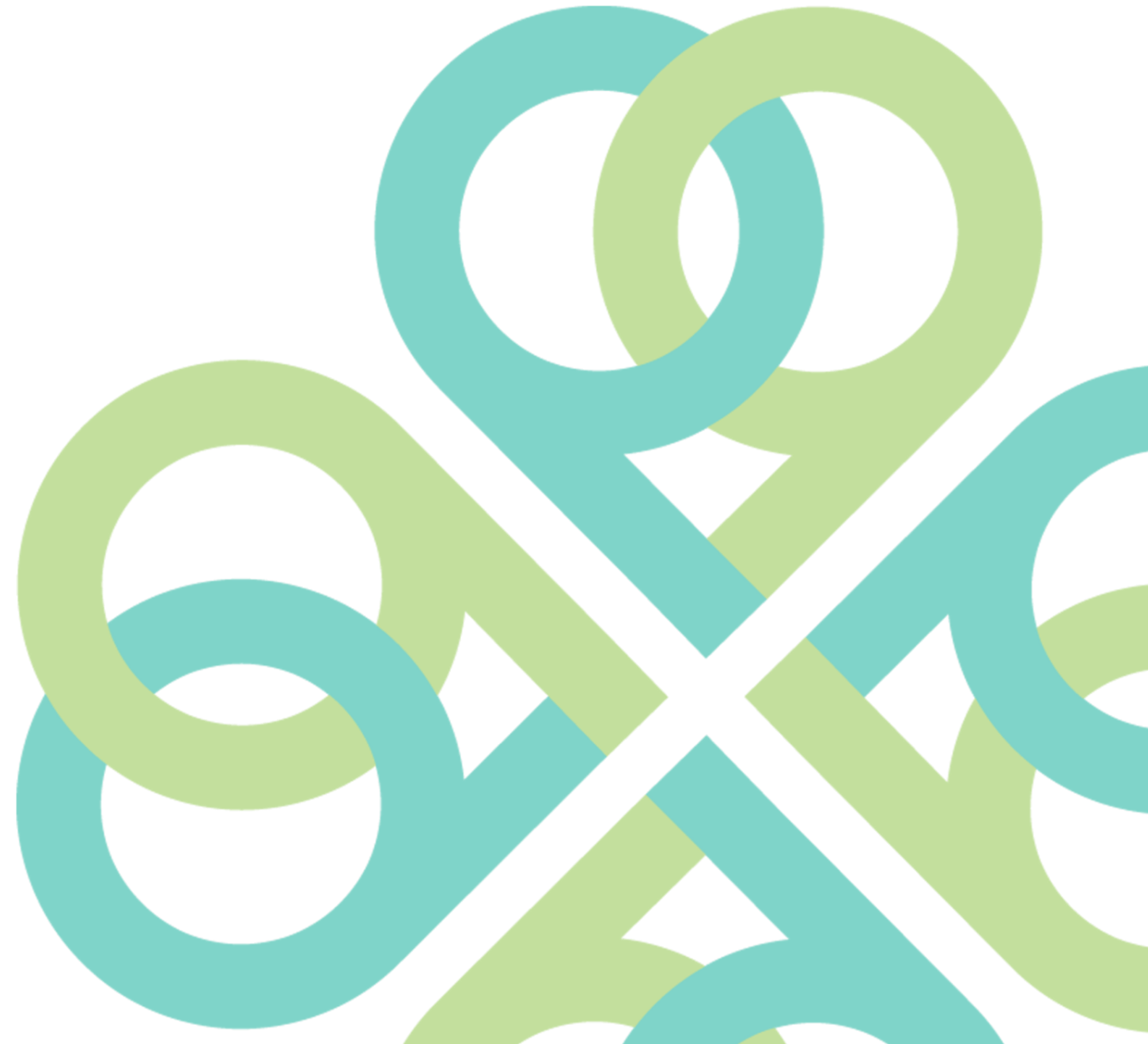
Remember: Take your time the audience has never heard what you have to say

Tips for Silence

- ✓ Take a drink of water!
- ✓ Count to (at least) 5 Mississippi in your head
- ✓ Have an answer prepped or ask your co-presenter



Ways to Engage



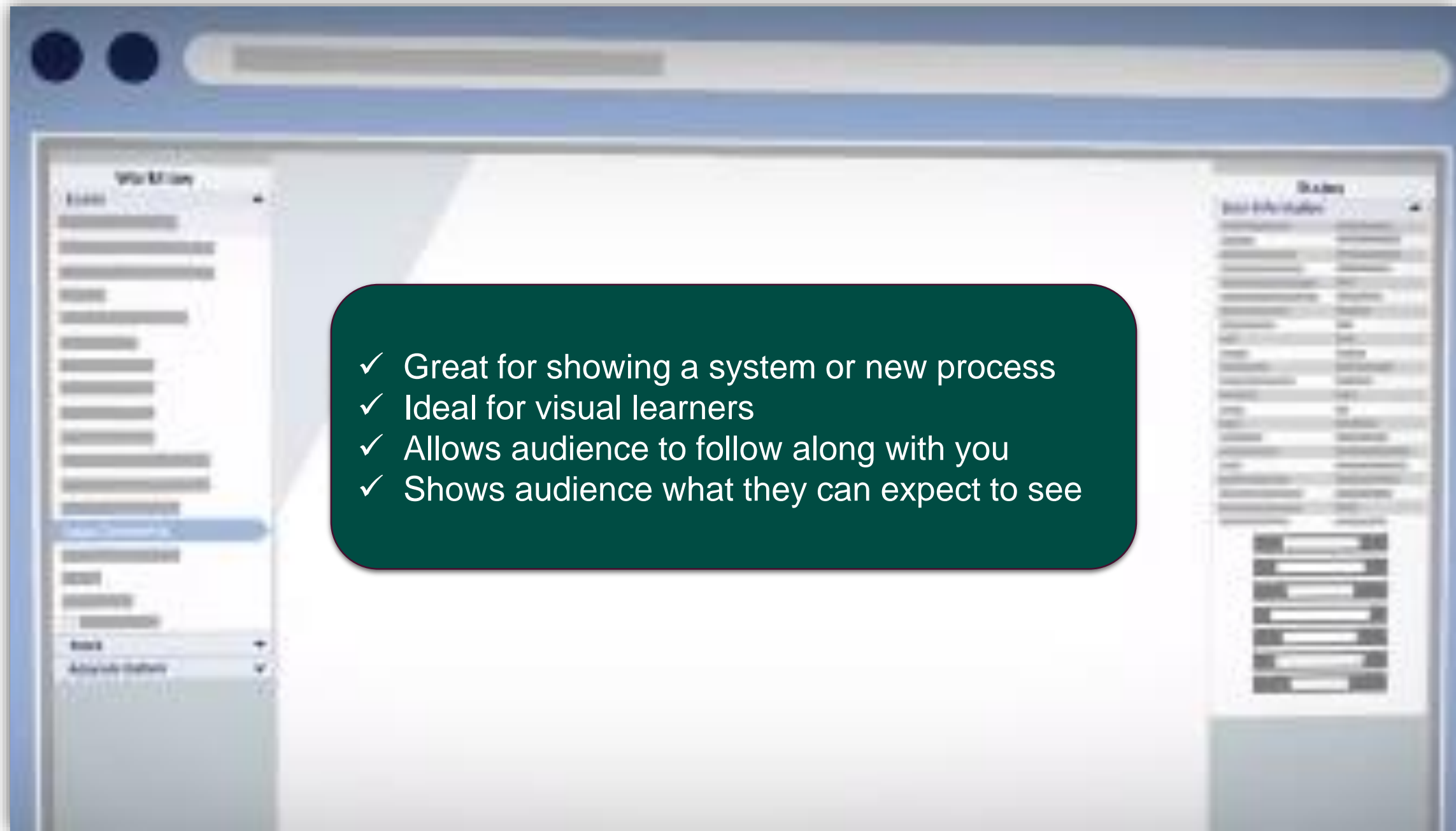
Ways to Engage

- **Demonstrations**
- **Process walkthroughs**
- **Scenarios**
- **Case Studies**
- **Polls**
- **Pework**
- **Videos**
- **Brainstorming**
- **Assessments**
- **Questionnaires**
- **Role Plays**
- **Open Ended Questions**

Other ideas?



Demonstrations & Walkthroughs



Scenarios & Case Studies

Meet Brenda & James



This is what we know:

- Retired professor and fire fighter
- Looking to downsize
- Want to find a house nearby to stay near family

What product(s) could fit their needs?

- ✓ Allows audience to personally connect and relate to the situation
- ✓ Great for applying concepts and ideas
- ✓ Audience can think through the situation independently first

Polls

Polls are easy to create and great at the beginning and throughout training sessions and/or meetings!

QUICKPOLL

How much French do you already know?

Please select one:

- Nothing
- A few words
- A good amount
- A working proficiency
- Fluent**

Click here to select this answer

Submit

- ✓ Require audience members to make a selection and participate
- ✓ Allow their vote to count
- ✓ See the responses of the entire group

Videos

Great way to keep visuals interesting and reiterate ideas!



✓ Great for getting ideas across in a new and different way

Pre-work

Allows people to start thinking about or keep thinking about the training session topic

Examples:

- Ask what they want to get out of the training/meeting
- Ask for their opinion or experience on the topic
- Ask what questions they want answered



Open Ended Questions

Pose the question and...

1. WAIT for someone to respond (embrace the silence)
2. Include the question on your slide
3. Call on someone directly to respond



Don't ask multiple questions!

Webcam Tips

Login – Log into the webinar approx. 15 mins early

Internet – Ensure you have a good connection so your webcam stream doesn't lag/freeze

Background - Look behind you to ensure it is all work appropriate, neutral and un-distracting

Noise - Consider background noise e.g. AC unit, window if near a busy road, etc.

Lighting – Present in a well-lit room and place lighting in front of you rather than behind you

Placement - Place the webcam a little higher than eye level if possible

Eye Contact – Look directly into the camera when you can to make “eye contact”

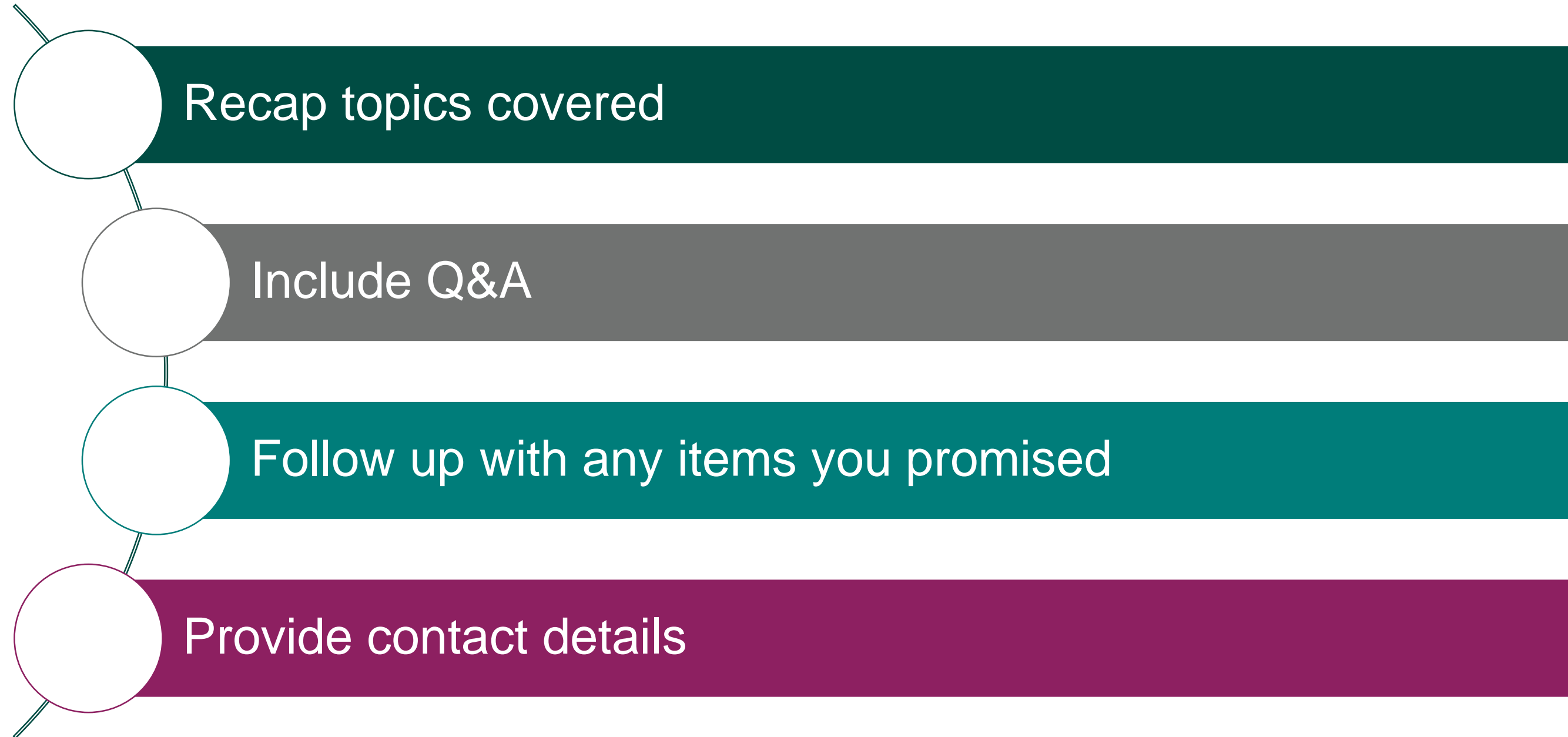
Attire - Dress comfortably and professionally

Gestures – Use your natural gestures

Smile!



Wrap Up



Tips & Takeaways to Try



Include an ice breaker

Be prepared and let the audience know what to expect

Consider your audience and your presenting style

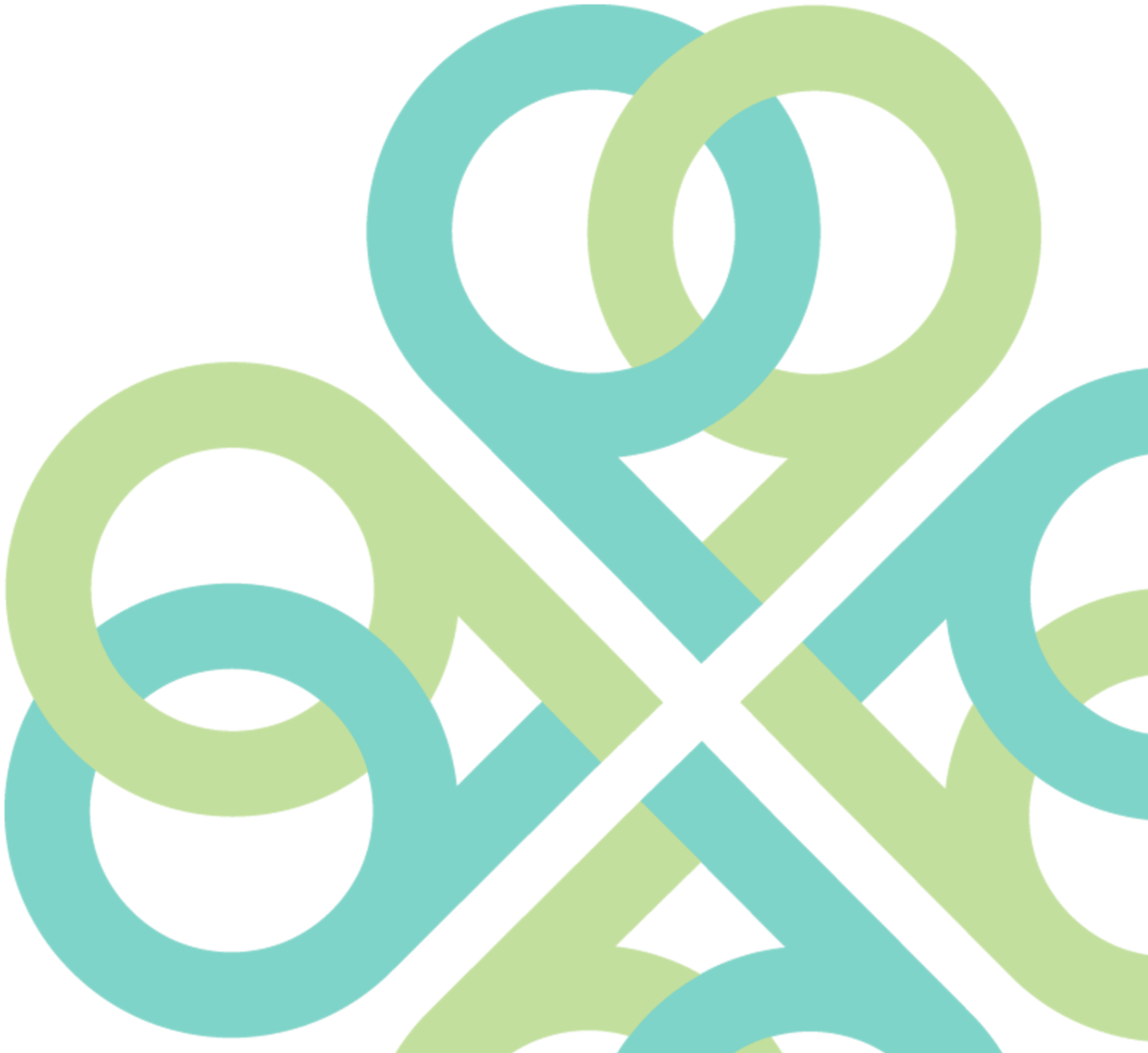
Try the different ways to engage

Leave silence after you ask a question

Recap what you covered

Be mindful when using webcam

Resources



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Quick Links

Below are some quick links to help you process your loan.

Rates

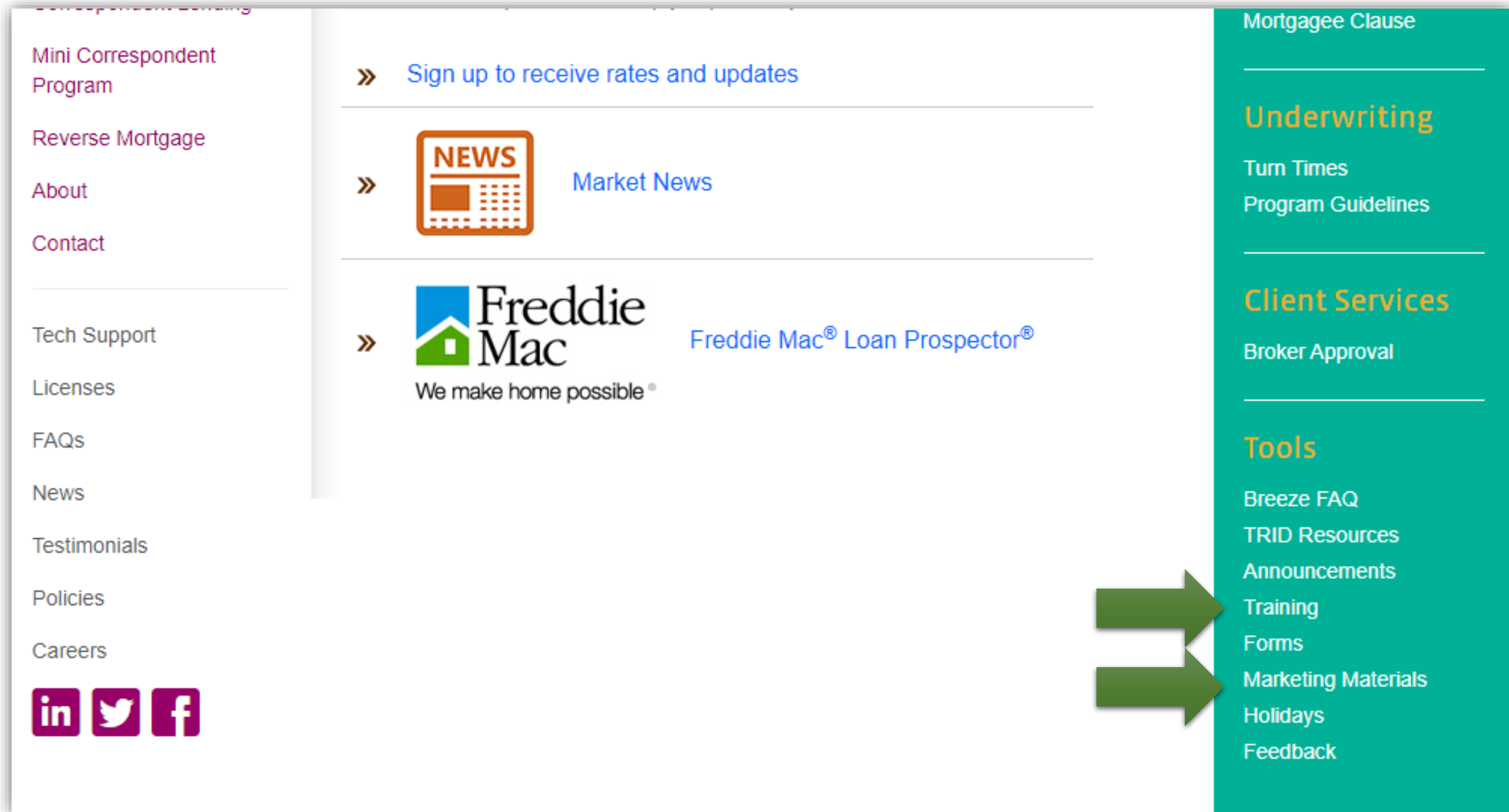
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Submit/Price Your Loan

[Wholesale Loan Submission Matrix](#)

Loan Services


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The screenshot displays the website's navigation and content. On the left is a vertical menu with links: Mini Correspondent Program, Reverse Mortgage, About, Contact, Tech Support, Licenses, FAQs, News, Testimonials, Policies, and Careers. Below the menu are social media icons for LinkedIn, Twitter, and Facebook. The main content area features three promotional items: a sign-up link for rates and updates, a 'Market News' link with a 'NEWS' icon, and a 'Freddie Mac Loan Prospector' link with the Freddie Mac logo and tagline 'We make home possible'. On the right is a teal sidebar with sections: Mortgagee Clause, Underwriting (with sub-links for Turn Times and Program Guidelines), Client Services (with sub-link for Broker Approval), and Tools (with sub-links for Breeze FAQ, TRID Resources, Announcements, Training, Forms, Marketing Materials, Holidays, and Feedback). Two large green arrows point from the main content area towards the sidebar.

- Mini Correspondent Program
- Reverse Mortgage
- About
- Contact
- Tech Support
- Licenses
- FAQs
- News
- Testimonials
- Policies
- Careers

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We make home possible[®]

Mortgagee Clause

Underwriting

- Turn Times
- Program Guidelines

Client Services

- Broker Approval

Tools

- Breeze FAQ
- TRID Resources
- Announcements
- Training
- Forms
- Marketing Materials
- Holidays
- Feedback

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