



GENERAL TIPS

DON'T

- Be unsure about advice given
- Wait for clients to call
- “Wing it” or script every word
- Jump directly from meeting to meeting
- Trust customer will fully focus on your words
- Be tentative on phone calls, since there’s no visual feedback to reassure you
- Dive right into business
- Say things like “I’m sure you’re scared...”
- Talk in technical jargon
- Use soft words such as maybe, just, I think
- Ask “Does that make sense?”
- Rush through talking points
- Try to end the meeting/call as soon as possible

DO

- Take time to build conviction about best advice
- Be proactive with communication
- List bullets to cover most important points
- Take a moment to pause and get re-centered
- Share a visual for them to view as you speak
- Glance at a picture of friends or family while you’re speaking on the phone
- Ask first about the person, their family, etc.
- Ask “How are you feeling about all this?”
- Explain concepts clearly and simply
- Make declarative statements, when possible
- Ask “Am I explaining that clearly?”
- Repeat main points and recap at the end
- Leave time for questions

SPEAKING TIPS

DON'T

- Use a dismissive or condescending tone
- Talk too fast
- Use filler words such as: “um or like”
- Speak in a higher pitch due to nerves
- Talk too quietly
- “Uptalk” so statements sound like questions

DO

- Use a decisive and comforting tone
- Slow Down
- Add pauses to allow information to sink in
- Speak in the lower end of your natural range
- Project your voice
- Use declarative talk

VIDEO CONFERENCING TIPS

DON'T

- Look overly stressed or worried
- Hunch over or slouching
- Fidget in your seat
- Tap the desk or repeatedly click a pen
- Wave your hands excessively while speaking
- Look away often or distractedly

DO

- Appear calm and smiling (when appropriate)
- Sit up straight
- Remain relatively still
- Keep your hands “quiet” on the table
- Gesture smoothly with your palms upright
- Maintain focus and eye contact



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