

Screen Share Tools & Setup – Knowledge Check

Instructions

Select the best answer for each question.

Question 1

What screen sharing tool does our team use with clients?

- A. Zoom
 - B. Google Meet
 - C. CrankWheel
 - D. Microsoft Teams
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Question 2

How should agents share their screen during a client call?

- A. Entire desktop screen
 - B. Program or application window
 - C. Browser tab only
 - D. Second monitor
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Question 3

Why is browser tab sharing required?

- A. It loads faster
 - B. It looks more professional only
 - C. It limits exposure to personal or sensitive information
 - D. Clients prefer it
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Question 4

What should be prepared BEFORE starting screen share?

- A. Personal email inbox
- B. Correct client-facing browser tab

- C. CRM notes for other clients
 - D. Desktop notifications
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Question 5

Which item should NEVER be visible during a screen share?

- A. Marketplace website
 - B. Plan comparison page
 - C. Email inbox or personal messages
 - D. Benefits summary
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Question 6

During a screen share, the agent should:

- A. Move quickly to save time
 - B. Let the client figure it out
 - C. Explain what the client is seeing
 - D. Avoid answering questions
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Question 7

What should an agent do BEFORE switching tabs?

- A. Continue sharing without stopping
 - B. Stop screen sharing first
 - C. Ask the client to look away
 - D. Minimize the browser
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Question 8

Which action best supports compliance and privacy?

- A. Sharing multiple tabs at once
 - B. Using browser tab sharing only
 - C. Showing CRM notes
 - D. Sharing the full desktop
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Question 9

What is the main purpose of screen sharing with clients?

- A. Speed up enrollments
 - B. Impress the client
 - C. Educate and build transparency
 - D. Reduce agent workload
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Question 10

What should happen at the end of a screen share session?

- A. Immediately close the browser
 - B. Switch tabs while still sharing
 - C. Confirm next steps and stop sharing
 - D. Leave the screen share running
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Answer Key (For Trainer Use)

- 1. C
- 2. C
- 3. C
- 4. B
- 5. C
- 6. C
- 7. B
- 8. B
- 9. C
- 10. C