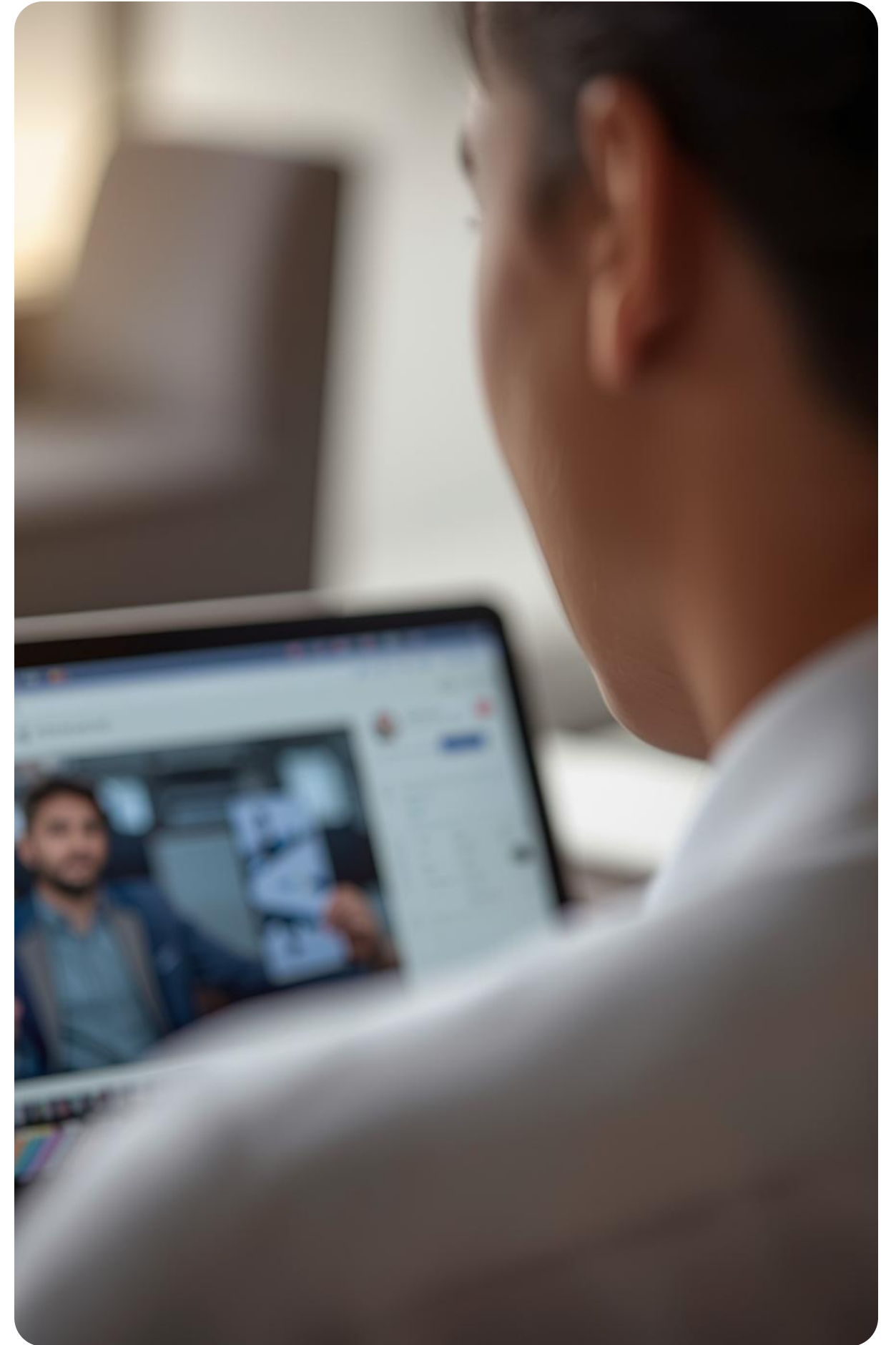


Screen Share Tools & Setup



The Importance of Screen Sharing

Screen sharing provides **real-time visibility** into information, enhancing client understanding of plans and pricing, while fostering increased confidence and trust through transparency and engagement during presentations.





Our Exclusive Tool

CrankWheel is our designated screen sharing tool, offering **fast access without downloads**, secure viewing, and easy control over what clients see, ensuring a smooth and professional sharing experience.

Screen Sharing Method: Tabs Only

Sharing only browser tabs ensures **client privacy** and minimizes distractions. This method prevents accidental exposure of personal information while focusing the client's attention on relevant content throughout the session.



Reasons for Browser Tab Sharing

Understanding the benefits of this method

Data Protection

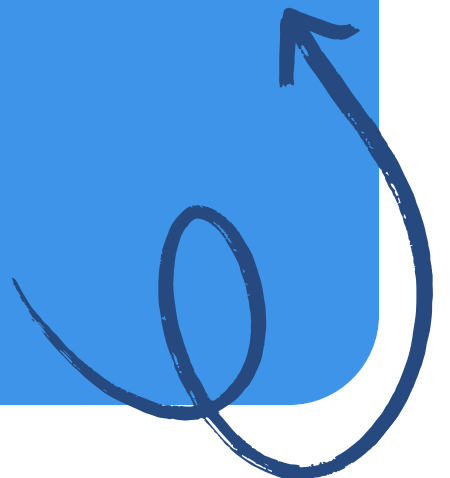
Sharing only browser tabs prevents the **accidental exposure** of sensitive personal information, ensuring a **secure** and professional experience for both clients and presenters.

Notification Management

By sharing browser tabs, you can effectively **hide notifications** that may pop up during a session, reducing distractions and maintaining the focus on the content being presented.

Enhanced Focus

This method minimizes visual distractions, allowing clients to better **concentrate** on the relevant information shared, fostering a more engaging and productive conversation.



Preparation Checklist

Essential Steps for a Successful Session

Open Correct Tab

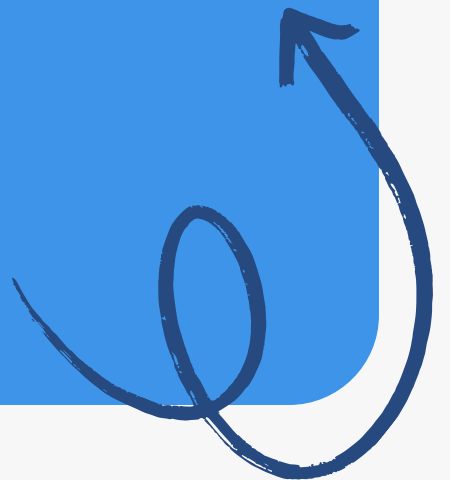
Ensure you have the **right browser tab** open before the session begins, as this prepares you to present the information clearly without unnecessary delays.

Close Unrelated Tabs

Close any unrelated browser tabs to maintain a professional environment, minimizing distractions and preventing accidental sharing of irrelevant content during your presentation.

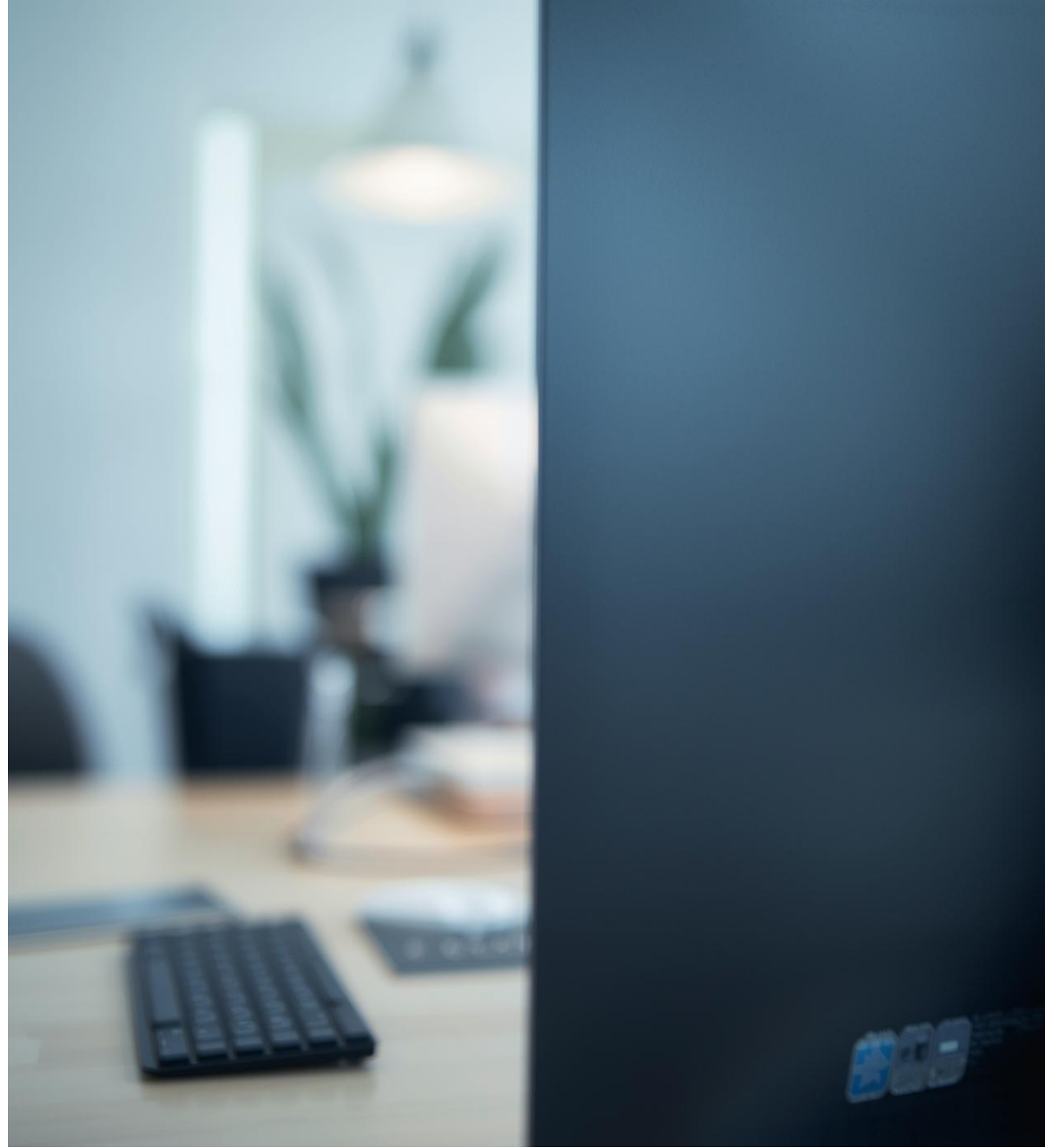
Client-Facing Sites

Only have client-facing websites or documents open to enhance professionalism, ensuring that your focus remains on the client's needs and the material being discussed.



Content You Should Not Share

Always prioritize **professionalism and privacy** during screen sharing. Avoid displaying personal email inboxes, private messages, unapproved CRM notes, or any other clients' information to maintain trust and confidentiality.



Effective Client Communication Tips

When screen sharing, always **explain what the client sees**, move at a steady pace, pause for questions, and confirm their understanding to enhance engagement and ensure clarity throughout the session.



Compliance and Privacy Standards

Adhering to privacy standards, including **HIPAA** and company policies, is essential for protecting client information during screen sharing sessions. This safeguards trust and ensures confidentiality in all communications.



Ending the Screen Share Professionally

Conclude each session by asking final questions to ensure understanding, confirming next steps, and stopping screen sharing before switching tabs. This approach maintains professionalism and fosters client trust during interactions.



Common Screen Share Mistakes

Avoid pitfalls like sharing the **wrong tab**, moving too quickly, displaying unapproved content, or forgetting to stop sharing. **Preparation and awareness** are essential for maintaining professionalism and client trust.



Key Takeaways for Effective Screen Sharing

To ensure successful client interactions, remember to utilize **CrankWheel**, focus on sharing only browser tabs, prepare thoroughly in advance, protect clients' privacy, and maintain professionalism to build trust.

