

WORKING REMOTELY

How To Run Your Mortgage Business Digitally



**MORTGAGE
MARKETING
ANIMALS
CONNECTED**

Today's Content

1. A discussion about change
2. Meeting with clients
3. Meeting with referral partners
4. Using Zoom and best practices
5. Feedback and Next Steps

What Do You Need?

Chris@connectionincorporated.com

www.facebook.com/cwjohnstone

We are here to help!

CHANGE CREATES GROWTH

1. Online Schooling
2. Online Church
3. Online Family Time
4. Online Friendships
5. Online Sales - No More In Home!
6. Online Exercise
7. Online Mortgages - Our Stats

MEETING WITH CLIENTS

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MEETING WITH CLIENTS

1. Automated appointment booking.
2. Appointment reminders.
3. Show up early.
4. You **NEED** good audio.
5. Use the webcam. You **NEED** good lighting.
6. Prepared links for your applications and resources.
7. Prepared follow up for after

MEETING WITH REFERRAL PARTNERS

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MEETING WITH REFERRAL PARTNERS

1. The Virtual Coffee Appointment - CONNECT
2. The Irresistible Offer
3. The Viral Open House
4. Support with transitioning to Digital Selling
5. Pre-Set appointments
6. Video file updates
7. Prepared follow up process for continued conversion

USING ZOOM

zoom.us/signin

REQUEST A DEMO 1.888.799.9666 RESOURCES SUPPORT

zoom SOLUTIONS PLANS & PRICING CONTACT SALES JOIN A MEETING HOST A MEETING SIGN IN **SIGN UP, IT'S FREE**

Sign In

Email address

Password

Sign In

[Forgot password?](#) Stay signed in

or

Sign in with Google

Sign in with Facebook

Help

SETTING UP YOUR MEETING



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CONTACT SALES

SCHEDULE A MEETING

JOIN A MEETING

HOST A MEETING ▾



SIGN OUT

PERSONAL

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Recordings

Settings

ADMIN

> User Management

> Room Management

> Account Management

> Advanced

Upcoming Meetings

Previous Meetings

Personal Meeting Room

Meeting Templates

Get Training

Schedule a New Meeting

Recently Deleted

Start Time ▾	Topic ▾	Meeting ID	
Recurring			Start Delete
Recurring			Start Delete
Recurring			Start Delete
Recurring			Start Delete
Recurring			Start Delete
Tomorrow 12:30 PM			Start Delete
Tomorrow 02:00 PM			Start Delete
Tomorrow 03:00 PM			Start Help

SETTING UP YOUR MEETING

[My Meetings](#) > Schedule a Meeting

Schedule a Meeting

Topic

PERSONS NAME - YOUR NAME

Description (Optional)

A friendly description of the topic - Mortgage Consultation and Q and A.



When

03/23/2020



8:00



AM



Duration

1



hr

0



min

Time Zone

(GMT-4:00) Eastern Time (US and Canada)



Recurring meeting

SETTING UP YOUR MEETING

Registration

Required

Meeting ID

Generate Automatically Personal Meeting ID 515-310-1889

Meeting Password

Require meeting password

Video

Host on off

Participant on off

Audio

Telephone Computer Audio Both

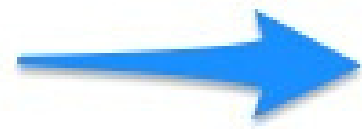
Dial from United States of America and other 1 country [Edit](#)

Meeting Options

Enable join before host

SETTING UP YOUR MEETING

Meeting Options



Enable join before host

Mute participants upon entry 

Enable waiting room

Only authenticated users can join



Record the meeting automatically On the local computer In the cloud

Alternative Hosts

Example: mary@company.com, peter@school.edu

Save

Cancel

SCHEDULING

My Meetings > Manage "PERSONS NAME - YOUR NAME "



Topic PERSONS NAME - YOUR NAME

Description A friendly description of the topic - Mortgage Consultation and Q and A.

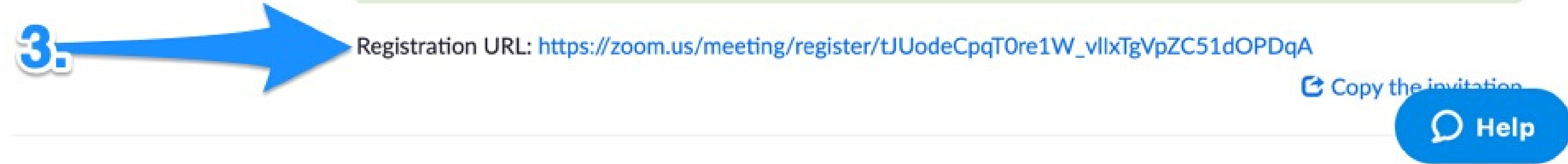
Time Mar 23, 2020 08:00 AM Eastern Time (US and Canada)



Meeting ID 915-291-761

Meeting Password × Require meeting password

Invite Attendees
People are required to register before joining this meeting.



STARTING YOUR MEETING



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CONTACT SALES

SCHEDULE A MEETING

JOIN A MEETING

HOST A MEETING ▾



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Recently Deleted

Start Time ↕	Topic ↕	Meeting ID		
Recurring	Chris Johnstone call with Diane and Nina (MMA)	931-266-335	Start	Delete
Recurring	Team Meeting	696-473-182	Start	Delete
Recurring	Chris Johnstone and Mel Gilbert Consulting Call	720-973-429	Start	Delete
Recurring	Connected Intake Call with Chris Johnstone	622-163-027	Start	Delete
Recurring	Sales Team Meeting	661-181-171	Start	Delete
Today 08:00 AM	PERSONS NAME - YOUR NAME	915-291-761	Start	Delete
Today 12:30 PM	How To Thrive While Working From Home!	334-923-468	Start	Delete
Today 02:00 PM	Chirag Patel: Call with Chris Johnstone - Connection I nc.	376-848-828	Start	Help



RUNNING YOUR MEETING

Open zoom.us?

https://zoom.us wants to open this application.

Cancel

Open zoom.us



RUNNING YOUR MEETING

Zoom Meeting ID: 915-291-761

Recording Paused

Meeting Topic: PERSONS NAME - YOUR NAME
Host Name: Chris Johnstone
Invitation URL: <https://zoom.us/j/915291761>
[Copy URL](#)
Participant ID: 14



Join Audio
Computer Audio Connected



Share



Invite Others

1

2

3

4

5

6

7

8

Mute Start Video Invite Manage Participants 1 Polling Share Chat Resume/Stop Recording More End Meeting

RESOURCES - AUDIO

<https://amzn.to/2Ud5jj6> - \$138.88



★★★★☆ (166 Reviews)

Audio-Technica ATR2100-USB Cardioid Dynamic USB/XLR Microphone

 Amazon.ca


RESOURCES - AUDIO

<https://amzn.to/39ezvyt> - \$167.98



Blue Yeti USB Microphone - Blackout Edition

 Amazon.ca

 (1454 Reviews)

RESOURCES - LIGHTING

<https://amzn.to/3bkAfDy> - \$145.49



Neewer Camera Photo Video Lighting Kit: 18 inches 48 centimeters Outer 55W 5500K Dimmable LED Ring Light, Light Stand

PLEASE NOTE: 1. The light stand in the package is folded that the three legs are upwards, so you should firstly adjust it to downwards as shown in the picture. 2. The camera and the smartphone in the picture are NOT included.

Descriptions: The lightning kit is compatible with iPhone6 plus/6/5/5S,...

[a](#) Amazon.ca

RESOURCES - LIGHTING

<https://amzn.to/2QFr60t> - \$32.99



★★★★★ (49 Reviews)

10" LED Ring Light with Tripod Stand & Phone Holder, UBeesize Dimmable Desk Makeup Ring Light, Perfect for Live Streaming & YouTube Video,...

Why should you choose UBeesize 10" LED Ring Light with Stand: 3 Light Modes 10" Ring Light The 10-inch Selfie Ring Light is dimmable with 3 lighting modes: White, Warm White, Yellow and 11 Brightness Options. Want to look bright and sharp in the photo? Choose the White color and turn up the light...

 Amazon.ca

WANT MORE?

Mortgage Marketing Animals Connected

<https://bit.ly/mortgagemembers>

PLEASE REACH OUT TO
SUPPORT@CONNECTIONINCORPORATED.COM
FOR MORE INFORMATION.