MEETING YOUR CLIENTS REMOTELY

GOTOMEETING GUIDE

Hi there,

At Irish Life, we pride ourselves **on** helping you and your clients build better futures. We are here and ready to make sure **that** we continue to provide the support you need **to grow and develop your business**.

We are committed **to** supporting you with remote working. The value of advice to your clients is more important now than ever. That's why **we've created this guide to help you meet your clients. This guide focuses on GoToMeeting, but we have guides for other video conferencing applications you can use. There are also other video conferencing applications available - these are just some examples**.
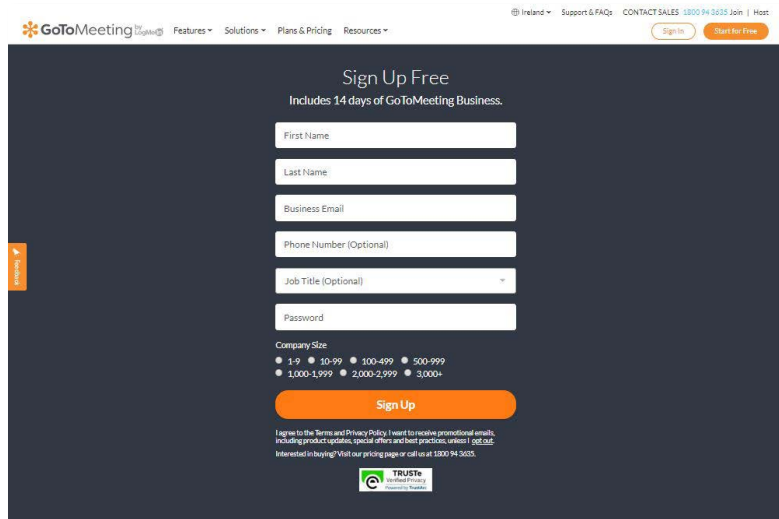
- **SETTING UP A GOTOMEETING ACCOUNT**

- **SETTING UP A MEETING WITH YOUR CLIENT**

- **RE-SCHEDULING OR CANCELLING YOUR MEETINGS**

- **SENDING YOUR CLIENTS THE MEETING INVITE**

- **CLIENTS JOINING THE MEETING**

- **STARTING AND ENDING MEETINGS**

- **SCREENSHARING**

- **USEFUL RESOURCES**

GoToMeeting
by LogMeIn

SETTING UP A GOTOMEETING ACCOUNT

To set up a GoToMeeting account, simply go to their website and sign up for an account.
You can sign up for a basic plan for free, or sign up to their other packages. You can get a 14 day free trial of GoToMeeting Business for free when you sign up.

You can find put more about their pricing plans here.

Once you've signed up, you'll be taken to your GoToMeeting Hub.

After you have set up your GoToMeeting account, you can set up your Personal Meeting Room. This will be in the format of https://gotomeet.me/(your name). You can use this link as your personal meeting room. You immediately set up a meeting using your personal meeting room, or give this link to your attendee.

TAKE NOTE

You need to give the access code to your attendees so they can access the meetings. However be careful as anyone with the link and access code can attend the meeting!

SETTING UP A MEETING WITH YOUR CLIENT

There are two versions of GoToMeeting available. If you are a new user, you will have the New GoToMeeting version. If you have a previous account, you may have the Classic GoToMeeting version. This guide will take you through using the New GoToMeeting version.

To set up a meeting with your client, simply click on **Create Meeting**. A meeting scheduler will pop up.

In the **Meeting** tab, fill out the meeting details.

On the **Audio** tab, you can set up a dial in function. The default option is to add in a **Long Distance Number**, but you can untick this box if you want to. Make sure to add in Ireland so you can provide a dial in number. Alternatively, you can use the free text box to add in your own **Personal Conference Service**.

You can Personalise your meeting URL on the **Personalize** tab.

Finally, on the **More** tab, you can add in a co-organiser and you can choose to **Require a Meeting Password**. For security purposes, it's advisable to add in a password to your meeting.

Setting up GoToMeetings can differ, **depending on the** version you use. Click on the version you have below to see GoToMeeting's Organizer Guide.

NEW GOTOMEETING
Organisers Guide

CLASSIC GOTOMEETING
Organisers Guide

RE-SCHEDULING OR CANCELLING YOUR MEETINGS

If you have to re-schedule your meeting with your client, go to the meeting on your Hub and click on Edit. If you need to cancel your meeting, simply click on Delete.

TAKE NOTE

You will need to send the new time proposal or cancellation to your client by email.

SENDING YOUR CLIENTS THE MEETING INVITE

To send the clients the meeting invite, simply copy the meeting info and paste it into an email or message.

You can choose to add this in a meeting invite through your Outlook or email provider.

Meeting Created ×

To share your meeting, copy the info below and paste it into an email or message.

OK

CLIENTS JOINING THE MEETING

To join the meeting, your clients do not need to have a GoToMeeting account.

To join the meeting, your client only needs to click on the meeting URL you have provided on the meeting invite. This will prompt them to download the GoToMeeting app or join from the web.

Your clients can also join the meeting through their smart phone by downloading the GoToMeeting app on

Download on the **App Store**

GET IT ON **Google Play**

Download on the **Windows Store**

CLICK TO LINK

To help your clients to join the meeting, you can send them GoToMeeting's guide for attendees.
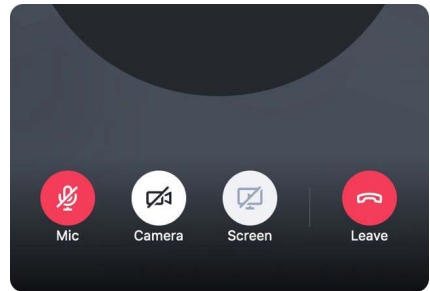
STARTING AND ENDING MEETINGS

<
To start the meeting, simply go to your Hub, choose the meeting and click on Start.

You will be taken to preview your audio and video.

>
Use the buttons at the bottom to control your Mic, Video and Screen Sharing.

To end the meeting, you can press Leave to end the meeting for all.

SCREENSHARING

A useful tool within GoToMeetings is the screensharing option.

This allows you to have a more immersive and collaborative meeting with your client. To start sharing your screen, simply click on the Screen Share button to start. The screenshare button will turn green if screen sharing is on.

Select the Window or App you want to share with your client.

Click on the Screen Share button again to stop sharing your screen.

TOP TIP! Only have the review open for the customer meeting minimising the risk of sharing the wrong screen.

USEFUL RESOURCES

If you are having any problems, there are many resources available online from GoToMeeting which can help you further.

CLICK TO LINK

GOTOMEETING
Organisers Guide

GOTOMEETING
Attendee Guides

GOTOMEETING
Online Meeting Support

GOTOMEETING
Screen Share Guide

GOTOMEETING
In Session Experience video

GOTOMEETING
Security Whitepaper

This document is for Financial Brokers only.