

# Screenshare Basic Overview Checklist

2<sup>nd</sup> Monitor – Hidden from participants.

## (-30 minutes before START)

- Restart Computer (Fresh Reboot of Computer is helpful)
- Turn off wifi | solid connection if possible
- Confirm computer connection speed ([www.fast.com](http://www.fast.com)) Up/Downstream
- Close unnecessary programs (this avoids POP UPS|distractions)
- CLEAR Computer Desktop!
- Turn off “notifications” – Messages|News, etc. (especially if using mobile phone or tablet)
- Airplane mode/Silence iPhone, iPad, Apple Watch (this avoids distractions)
- Avoid using BLUETOOTH devices for connecting (avoid disconnections, delay)
- Move your FINDER to the 2<sup>nd</sup> Monitor
- Open presentation in 2<sup>nd</sup> Monitor
- Open all collateral you will be using in 2<sup>nd</sup> Monitor
- Adjust Cursor size
- Set up “whiteboard” (tethered or indigenous to the platform)
- Launch Screenshare Platform

## (-20 minutes before START)

- Confirm Camera is working | orientation is good (you may need to put books under your computer to get the view more professional for the viewers)
- Set up | Confirm the greenscreen (if applicable) | Client logo on Screen?
- Confirm you have turned OFF the need to let others into the meeting
- Confirm Audio works | double check WHICH mic & test for range
- Set up ROOMS if necessary
- Disable Chimes & On-hold beeps
- Confirm you know how to MUTE/UNMUTE someone
- Word document ready for notes in 2<sup>nd</sup> Monitor
- Agenda on screen for when participants arrive
- Have something to take notes with (PEN|Paper)
- IF you have multiple team members on the SCREENSHARE confirm who is taking notes while other team members engage with clients
- Water nearby

## (-10 minutes before START)

- Have your camera cover closed until others show up
- Keep smiling after the meeting is over and you have CLOSED your Camera cover!

EXTRA Credit – Have your Pre-call Plan completed – Shot Of Octane Videos Video 179 – Video 183

NOTE: Many of these items are meant to both DECREASE distractions and anxiety. The typical challenges occur in the (-30) tasks which gives you time to figure it out before the attendees show up