**Building Rapport in 1:1 Virtual Meetings**

Set Up

* **Set Up:** When setting up your virtual meeting, let your client know if your video will be on and give clear instructions for how they can turn theirs on.
* **Tech Check:** Before you get down to business, be sure to review the technology with your client, to make sure they can see and hear you. Clarify what to do if there is an interruption or disconnection from the meeting.
* **Agenda:** Begin the call outlining the meeting objectives and an overview of what you will be discussing.

Pacing and Structure

* **Pacing:** Even if you feel pressed for time, ensure your pacing is calm and you are fully present. Check in with how your client is doing that day. Do they seem in a rush, or stressed? Addressing this right away can lead to a more successful meeting. Brief and appropriate small talk can help your client ease into the business at hand. If your client is a “strictly business” type, follow their lead.
* **Comprehension Check:** Even if they appear to be following along and understanding, build in time to ask a question that confirms they understand.
* **Reflect:** Reflect the client’s comments and emotions back to them to confirm understanding and validate their experience.
  + Benefit specialists can take a course on Motivational Interviewing in the [ERI ADRC training platform](eri.litmos.com).
* **Next Steps:** Before ending the meeting, clarify next steps and make sure they know how to contact you for any follow up.

Tips for Video Calls

* **Video On:** Even if the client does not turn on their video, keep your video on. People make deeper connections with others when they can see them. Seeing your face will help your clients feel a connection with you and will help to build trust.
* **Mirroring:** Mirroring can build further connection and trust. When both your video and your client’s video are on, you can more easily match your client’s energy and body language.
* **Monitor Engagement:** Monitor your client’s engagement. A video meeting allows you to monitor your client’s nonverbal communication. If your client appears to be confused about the information or distracted, it gives you the opportunity to check in with them to keep the engagement high.
* **Background:** Your background matters! Be aware of your background. No one wants to see a pile of dirty dishes, laundry, or other unprofessional clutter. If need be, consider using a well-chosen, professional looking virtual background.