



DEMO LOGISTICS Worksheets

[Click here to go to the article with details on how to use this worksheet.](#)

CAMERA CHECKLIST

Instructions:

Use this worksheet to plan out how you will ensure you have your camera at eye level or above.

What is your current camera angle?	How can you adjust your camera so that it is at eye level or above?
	<ul style="list-style-type: none"><input type="checkbox"/> Stack of books<input type="checkbox"/> Laptop stand<input type="checkbox"/> Adjustable desk<input type="checkbox"/> Other <hr/> <hr/> <hr/>

Instructions:

Use this worksheet to figure out how close you need to be to the camera to build a connection with your prospect.

Tip: When you're meeting with prospects over the video, sit as close to the camera as possible. This will help create a feeling of closeness and connection.

ROOM	HOW CLOSE TO THE CAMERA DO I NEED TO BE?

BACKGROUND CHECKLIST

Instructions:

Use this worksheet to determine the best lighting and background options for your video calls.

Do you have access to natural lighting? What sources of natural light do you have in your home or office?	Do you need to invest in an LED light? If yes, when will you make this purchase and have it set up?	What is your current video background?

<p>On a scale of 1 to 10, how professional does your current background look and feel? With 1 being, “Not at all professional,” and 10 being, “Extremely professional”.</p>	<p>What can you do to make your background look more professional?</p>	<p>Consider including an interesting conversation piece in the background. What would you pick that is representative of your personality and makes for a great conversation starter?</p>
<p>1 2 3 4 5 6 7 8 9 10</p>		



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Instructions:

Use this worksheet to develop a checklist of guidelines for your team to adhere to on every call.

Make a list of what you want to cover with your team before a call. Think of it as a list of guidelines and best practices that you want all your team members to adhere to when they are on a call with a prospect.

- Mute yourself if you are not talking
- If you are an SDR, switch off your video after you've made the intro
- Turn off your notifications
- End on time
- Have your video turned on

SCREEN SHARING CHECKLIST

Instructions:

Use this worksheet to identify a list of tabs you want to have open before starting your presentation as well as any notifications you need to silence before the meeting (i.e., phone, laptop)

What tabs and links do you need to have open during a presentation?	What notifications do you need to silence before a meeting?

INTERNET CHECKLIST

Instructions:

Use this worksheet to determine if you need to upgrade your internet connection.

Check your internet speed. Is this something you need to upgrade?

Yes

No

Think back over the last 10 calls you've had. Were there any glitches on your end?

Yes

No

Instructions:

Use this worksheet to put a plan together to help you handle any tech glitches that might come up while on a call.

Have a backup plan for when things go wrong on the tech side

- If the internet connection starts to act up, ask your prospect to head to www.fast.com so that you can diagnose on whose end the glitch is (Not to point fingers, but to diagnose!).
- Try turning the video off and keeping the audio on especially if the lag is only a couple of seconds.
- If it's just you and the prospect on a call, exchange your mobile numbers through chat and jump on a cellphone call instead (But keep your screen on, and just mute your computer mic and computer speakers).

Tip: Tech glitches are bound to happen sooner or later. Have a checklist of possible things that could go wrong and be prepared to diagnose the problem as quickly as possible.



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SUPPORT CHECKLIST

Instructions:

Use this worksheet to make a list of all the instances you might need to troubleshoot for a prospect while on a remote sales call.

Make a list of all the scenarios where you might need to talk your prospect through how to do something on a remote call.

- How to switch their audio/video on or off
- How to share the dial-in/login details with someone else
- How to share their screen/file/link with you

Notes:

A large rectangular area filled with a light grey grid pattern, intended for writing notes. The grid is composed of small squares and is enclosed by a thick grey border. The border is slightly offset from the grid edges, creating a margin.



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