

Time To Get Rolling With Video—TWO Great Tools And An Expert Guide To Get You Started

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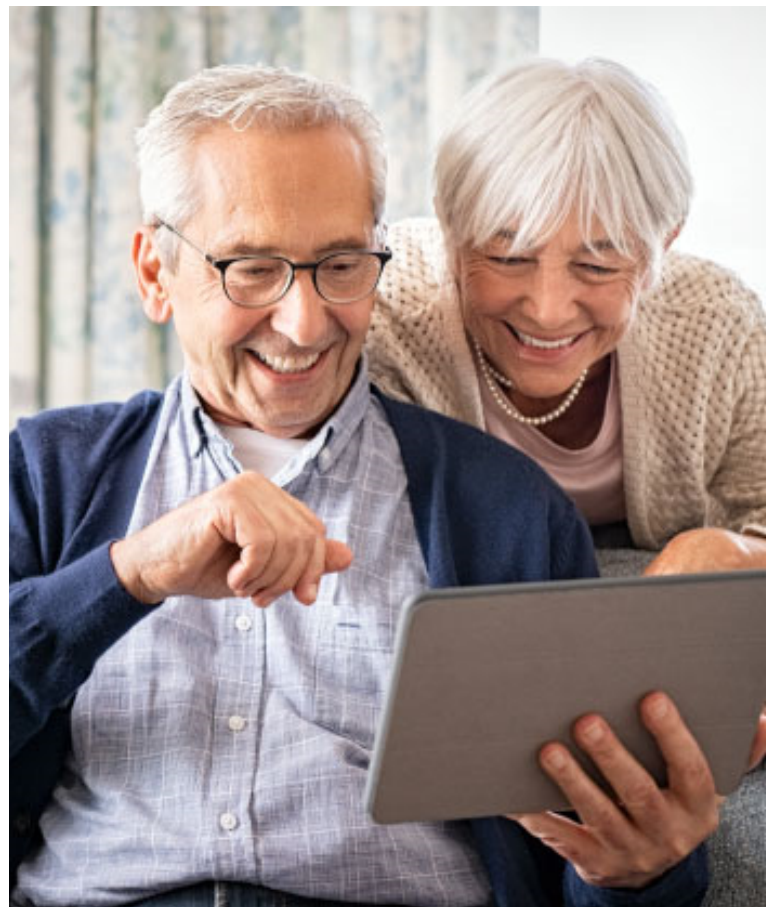
Whether through a warm message embedded in an email, or a common question answered exactly when they want it, video is a way to serve clients more personally. These tools and tips from video marketing experts will help you get up and running as soon as today!

Regardless of where you live, 2020 was a year where almost everyone learned to embrace video technology in one form or another to supplement human interaction. At first, like everyone else, we over-indulged in Zoom and found that we could easily continue our client conversations in virtual “face-to-face” conversations in light of the pandemic lockdown.

As we continued to navigate the new landscape, we had the privilege of being surrounded by experts in the field who really opened our eyes to the power that one simple, short video holds. Our trusted colleagues have taught us that video isn’t just about selling your brand, but it’s about deepening conversational relationships and embracing the human-to-human element.

The world has opened up again, so you may be asking, “Why do I need to consider video now?” The fact of the matter is video has a place in your practice even if you decide to never use Zoom again in your life:

- We learned to use video instead of text in some of our emails.
- We learned to use video to answer those client questions we are asked over and over by creating a standard video with a long shelf life.
- We use video to explain and show clients complex tools and strategies; some of these are whiteboard-style videos.
- We use video to build relationships and show empathy to our clients and you know what? They love it! And you know what else? It is an organic referral tool for us because video is easily shareable and highly impactful.



Worried about compliance? Don't sweat it! As long as your standard disclosure accompanies the video in your email or is embedded into formal graphics, you will be in compliance. Check with your own compliance department for specifics.

Here's another perk: Video is considered a marketing tool and many wholesalers will have the capacity to underwrite all or part of the cost. That can be a real added advantage when budgets are already committed.

Video doesn't need to be complex, *at all*. We've outlined below our favorite tools and in fact have given you a few tips from our trusted experts in the field on how to get started.

Expert tips

We've spent lots of time talking to experts and researching the topic. This will save you time, as we have done the legwork! Here are a few insights from our trusted colleagues.



1. You convey more in video than text

Laura Garfield and Sharon Gottula at Idea Decanter remind us that you can find out much more about someone from a conversation than you can from an email. If you want to make an impact with your first impression, video will get it done! They stress that with video you can:

- Communicate many messages with one carefully crafted video
- Deliver body language and inflection—visual cues you can't convey with copy
- Create content remotely from your office or home

They shared even more production tips with us in their "[Formula for Better Video](#)":

- **Wear a microphone.** A lavalier microphone you clip to your shirt will provide superior audio quality to the built-in microphone on your phone or camera. People will stop watching a video with poor audio (the same not necessarily being true for poor video) so don't neglect it.
- **Frame your shot.** You want your head and upper torso to be in the shot, with the camera eye level or a little bit higher than that.
- **Be concise.** Get to the point, say it, and then end the video. People just don't have the time or attention span to watch long, dawdling videos.
- **Light like a pro.** Like audio, lighting is often overlooked, though it is arguably more important than your camera when it comes to making great-looking video. Sit facing a window to utilize daylight (and definitely don't have the window behind you!), or get yourself an LED ring light to evenly light yourself with one light. Multiple LED panels will achieve two or three-point lighting.

2. Blue sky it

Elyse Stoner, Founder and Chief Strategist of [Fresh Perspective Consulting](#) challenges you to look at your video content in a different way than you might have before. “When planning your content, really ‘blue sky’ how you can use it,” she says.

- Share event video snippets to further engage audiences after the actual event is complete.
- Use another delivery method, i.e. social media or email campaigns versus simply posting it to your website.
- Create a special Call-to-Action in the video. Ask people to sign up for your newsletter or opt-into your mailing list in exchange for a whitepaper or another useful resource.
- Get creative with your formats. Not every video should be a single talking head. Panel discussions, staged viewer Q&A sessions, and interviews are highly engaging and provide “evergreen” content.

3. Take the viewer’s perspective

Kalli Fedusenko, Founder and Director of Kalli Collective provides us with a few pointers:

- Content should be all about the audience, not you.
- Outline your content before scripting—think of using a content creation worksheet [like this one](#).
- Audio is just as important as visual in a video—make sure you have a good microphone and either have a lavalier or are sitting close to a desk mic.
- Think about the background of the video. Keep it neutral and uncluttered. It can be an asset or a distraction.
- Your videos will get at least double the views if you email them out to clients.
- Share your video as a hyperlinked thumbnail—you will get more views than just a link.
- You won’t get significant views on social media if you don’t advertise your videos.

Time to get rolling...

Your first job is to choose a format. Should you do on-the-fly videos versus scripted videos? Both. They both are equally effective and have a place in your practice.

1. BombBomb: On-the-fly videos built into your Outlook or Gmail!

One of our favorite tools to supplement day-to-day interaction is [BombBomb](#). In the book *Rehumanize Your Business* by Ethan Beute and Stephen Pacinelli, we learned not just the mechanics that contribute to an impactful video, but the psychology behind why using video in your mix of communications can break up the monotony of the ordinary sea of continuous text most of us have become so accustomed to in a world where email proliferates.

We have found that the BombBomb video technology has become part of our daily business routine. It’s simple to use, compliance-approved, palatable for any budget and it works because you don’t overly produce it. For the cost of a few Starbucks ventis a month, you can turn your average email message into a “Wow!” message.

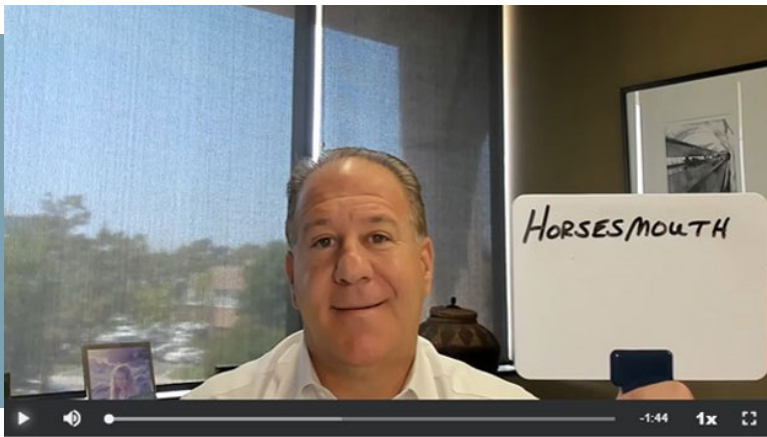
In just a few simple steps, your computer monitor turns your email into a face-to-face touchpoint with your client. You simply press the record button, look into your camera, and talk to your client. It’s that simple. You don’t have to practice, you don’t have to prep, in fact the more imperfect it is the more relatable you are to the recipient.

Just as you wouldn't send data or trade information over email, you wouldn't do that in your BombBomb video. Instead, think day-to-day emails and think short: 60 seconds max! Here are our favorite ways to use BombBomb:

- Meeting and event confirmations and follow-up
- Happy Birthday messages
- Thank You notes: make them come to life in a video message
- Sharing of concern or empathy
- Market turbulence: face-to-face reassurance that everything is going to be OK

These short videos give us a chance to show emotion, empathy, gratitude, joy and sadness using body language, tonality and facial expressions—all things we as humans were meant to communicate with.

Here's a message to you created on BombBomb:



Here's A Message To You Created On BombBomb

2. Scripted videos with our favorite tool— Idea Kit by Idea Decanter

While we love BombBomb for our everyday communications, there often is a time and a place for more professionally crafted videos. These also don't have to be hard or expensive to produce and our favorite part is you can do it all on your smartphone! We use these types of videos to share our messaging, explain our proprietary tools, introduce team members, and most importantly, educate our clients on a myriad of topics to assist them in wealth and life planning.



Yes, you can bring a video crew into your office, but that will usually set you back thousands of dollars per video, not to mention the hassle of bringing a crew in and/or traveling to an ideal location. For hundreds of dollars a video instead of thousands, you can have it done all for you through your smartphone with three easy steps.

Idea Decanter will ship you all the gear you need to record, take you through their custom story planning process, live coach you through the recording sessions and produce high-quality professional videos. And you never have to leave your office! Still not ready for the financial investment? They shared some of their best [DIY tips to create professional videos](#). Here's one of the videos we created using Idea Decanter's Idea Kit:



Here's One Of The Videos We Created Using Idea Decanter's Idea Kit

Create your workflow—4 simple steps

Whether you choose the DIY, Idea Kit or the full production route, the workflow remains the same for any video you want to create:

1. Plan your content, write your script
2. Record
3. Edit
4. Share

1. It all starts with a plan

Creating a video that gets the job done starts with deciding what you're trying to accomplish. Just like with a financial plan, it's important to lay out where you're trying to go. So, start by doing some goal setting.

Are you trying to:

- Establish yourself as an expert?
- Help nurture your relationship with clients so that another advisor can't replace you?
- Connect with prospects in a way that other advisors aren't?

Once your goal is clear, you can start planning the right messaging to connect with that audience. Writing a script that focuses on your viewer's needs and speaks to them in a one-on-one way will help keep your audience engaged. Focus on telling a story versus being factual or statistical.



2. Ready to record?

As we've mentioned, recording can be as simple as grabbing your phone or as complex as hiring a crew. Obviously, you need to weigh budget, but to decide what's best for you, circle back to those initial goals. How much is a new client worth? How much is it worth to keep existing clients from being lured away?

Once you decide how to record, find a place with a neutral, uncluttered background and a lot of natural light or windows. Grab yourself a really good microphone, a Zoom light and off to the races you go. Unlike the BombBomb videos, these videos are scripted and should be rehearsed until you know it well. There are teleprompter apps available if you aren't comfortable memorizing your content. Be sure to also secure a tripod for your phone to reduce movement.

3. Not an editor? No problem!

Editing isn't for everyone, but there are plenty of ways to polish up your raw recording. Tools like iMovie are intuitive and built for beginners. [Vimeo](#) has a video maker with templates to help you create content. And check out [Soapbox](#) by Wistia for editing and sharing if you want to record your videos with a webcam.

Consider adding captions to your video if you plan to share it on social. Approximately 80% of video content on Facebook is viewed with the sound off (!), so having on-screen text helps your viewer get your message. Captions are also highly recognized by Search Engines and help to boost your Search Engine Optimization (SEO).



4. Share like a pro

Congrats! Your video is finished and ready to be unleashed on the world. Now what? First consider where your video is going to “live.” YouTube is worth considering since it is now the second most popular search engine on the planet, topped only by Google. It is also a great place to house your videos. Wistia and Vimeo are two other hosting sites to consider.

Make sure to find a home for your video by embedding it somewhere on your website. Having video on your website helps with SEO, but more importantly, it does the job of introducing you to people who Google you before they pick up the phone to set up a meeting. You can also link your videos housed on YouTube to your website, saving server storage space while boosting your SEO.

Create a calendar

Your final phase is to get organized: create a calendar and assign dates for each distribution channel to share video.

Then, take that video and share it on the social platforms you’re using for your business. For most advisors, LinkedIn and Facebook make the most sense—and possibly Twitter if you have a following there. Never link your video from another site to social. Always directly upload your file to each platform so the video autoplays.

The most overlooked (and possibly the most powerful) way to use video is in email. If you have an email distribution list of clients, COIs and prospects, make sure to use it. Write up a message that will make them want to watch. Next, add an image with a play button from your video that hyperlinks to YouTube or wherever your video is posted. People are much more likely to click on an image with a play button than just a URL, so don’t skip this step!

What are you waiting for?!

So, there you have it—tips and ideas for creating video! And remember:

- Video will help you get in front of your clients.
- Don’t wait, or you will get left behind.
- Video *does not* have to be perfect—just do it!

For questions, please do not hesitate to reach out to Angela York at angela@angelayork.com or call (949) 422-6530.



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