Bob Veres E-Column: Mastering Video

There are so many horrible things about the current COVID-19 pandemic that it’s hard for us to make ourselves think about any positives. But one small silver lining in an otherwise very dark cloud is that social distancing has accelerated a trend toward videoconferencing—internally among staff, and externally with clients. We’re learning a new skill that will help all of us long after it’s safe to shake hands again.

While we’re at it, we might use some of the time we would normally spend commuting to the office to learn another skill that will be useful to the profession: creating a video presence. Research has shown that about 30% of all people (meaning roughly a third of current and prospective clients) are auditory learners, meaning that they aren’t getting much out of your email updates, blogs and newsletter messages. The advisory firm of the future will help prospects find a comfort level with its advisory team via a short video on the website, and answer client questions and provide updates in video format.

When you master video, you will finally be capable of reaching that ‘other’ 30% of us who want to see and hear you, instead of having to read whatever you have to say.

What are you waiting for? Chances are, a lot of things. You don’t know what equipment to use (Mobile phone? Laptop camera? $10,000 Sony XD-CAM?), and you feel like you look (technical term) dorky reading a script in front of a camera. What kind of lighting should you use? What are the best strategies for communicating effectively in a video format? What should you wear when you’re on-camera? Is the content different from what you put in your blog?

If you’re looking for answers to all this and more, you might consider a new video training program being launched by FiComm partners, the marketing firm in Los Angeles and New York. The training will take the form of a series of (as you might guess) videos, created by Candice Carlton, who has trained advisors in video communication at MercerAdvisors, United Capital and the XY Planning Network.

The first workshop takes place on May 11. You can find more information here: [https://www.ficommpartners.com/zero-to-launch-workshop/](https://www.ficommpartners.com/zero-to-launch-workshop/), introduced, appropriately enough, with video messages from Carlton and FiComm CEO Megan Carpenter. You receive assignments to create your own practice videos, get in-person coaching, post your homework and get feedback from the facilitators and your peers who are in the program. The idea is that you make your mistakes in the program so you don’t make them with prospects or clients. (The cost to enroll has been reduced from $2,500 to $1,100.)

I talked with Carlton and Carpenter about some of the things that you should know about video. First of all, why would you want to get up to speed on a new client communications format? Why now?
“There has been a huge shift in recent weeks about how consumers connect with people, how they connect with friends, and what they expect from the people they have a business relationship with,” says Carpenter. “People have changed their standard for making a connection. In order to move your business forward successfully into the future, you really need to make significant changes in how you communicate and connect.”

What should advisors understand as they prepare to create their own video messages? “A lot of people get really camera shy,” says Carlton. “They feel like they have to get it perfect, like someone on Bloomberg or CNBC.”

Don’t they? “People aren’t looking for perfection; they’re looking for authenticity,” says Carlton. “You want to show up on video in a way that is aligned with how you would normally show up for a client in an in-person meeting. The issue is: how do you convey your message in a way that is powerful and authentic.”

Powerful? “If you’re grounded in who you are and what you do,” says Carlton, “then people will respond to you. We’re going to talk about some tricks on how to show up on video like you do in real life.”

Carlton says that advisors who are starting out on video typically want to script out their message, just like they would write, edit and perfect a nice, tidy blog—so they can read the message on camera from a teleprompter. Unfortunately, what seems like a safe strategy is also a bad one.

“If you’re reading a script, and you’re not a pro at it—and none of us are, because that’s not our day job,” Carlton explains, “then you’re going to come across as robotic. The person on the other side will feel like it’s inauthentic, and you lose the power of video. You lose that authentic connection.”

Instead, Carlton suggests that you write down the three bullet points that you want to deliver, and you speak to your talking points off the cuff, the way you would in a client meeting. “That, says Carlton, “lets you deliver a coherent message and also be yourself, so that the person watching you feels like you’re talking to them, not just reading a script.”

That answers one of the earlier questions: the video message will be different from what you would put in a blog; it will be less formal and less scripted.

What about equipment? That Sony whatever-it-was that costs as much as the down payment on a house? “In this day and age,” says Carlton, “you don’t need a professional production team to create really high-impact video. You can shoot a video using your phone or your webcam.”

Do you need to adjust the lighting? That’s something that will be commented on in the feedback sessions. The same with the background. And the same with content—until
you’ve mastered a new medium the way you’ve probably already mastered the blog. “We believe that video is for every single person,” says Carlton. “The issue is: how do you get all of ‘you’ conveyed via video?”

This is a skill everybody will need to master sooner rather than later. Do you have the time to do it now?

Please stay safe and know that your clients are lucky to have you as a part of their lives during this difficult and challenging time in our history.

Best,

Bob Veres
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