Video Production Checklist for Financial Advisors

Getting started with video is pretty daunting. This checklist will get you through your first video and hopefully many more.

1 CHOOSE A SPECIFIC TOPIC

- [ ] Brainstorm a list of 10 topics and prioritize by your top customer challenges

  Consider
  • Top questions from clients
  • Biggest friction points when on boarding

2 CREATE A CONCEPT DRAFT

- [ ] Create an outline
- [ ] Develop main message
- [ ] Add supporting bullet points
- [ ] Organize into a coherent flow

3 FINALIZE SCRIPT

- [ ] Run through Hemingway App to simplify
- [ ] Read the script out loud to make sure it flows well
- [ ] Break the script up to 1-2 sentence segments

4 LIGHTING

- [ ] Lighting is the top factor in making your shot look good
- [ ] Make sure that the light sources are in front of you
- [ ] Go to a window and make sure you're facing the outside
- [ ] Use a lamp or brightly lit computer screen

5 SOUND

- [ ] Get your microphone as close to your subject as possible for the best audio and use a second iPhone
- [ ] Use a second iPhone or an external microphone adapter e.g. Sennheiser ME66 with a KV microphone adapter to send audio directly into your iPhone
- [ ] Clap once for the start of each take as a reference point for synching the dedicated audio track with the bad sound from the video recording

6 VIDEO

- [ ] Shoot in 1-2 segments if using a laptop camera
- [ ] Make sure the camera is pointing slightly downward at the subject if using an iPhone camera
- [ ] Don't shoot vertical video since it will be viewed widescreen
- [ ] Use a tripod with an iPhone for stable shots
- [ ] Cover the lens for a second or two after a good take for easier editing
- [ ] Use the exposure focus lock if using an iPhone to stop auto refocusing
- [ ] Create 10-15 seconds of "B roll" clip or additional footage for editing later

7 EDIT

- [ ] Use video editing software iMovie(Mac users) or Magix Movie Edit Pro (Windows)
- [ ] Use the additional footage (B-roll) to hide the edits between each part of your script

8 PUBLISH AND EMBED

- [ ] Publish to YouTube-the world's second biggest search engine
- [ ] Try Wistia to publish and embed for a cleaner experience

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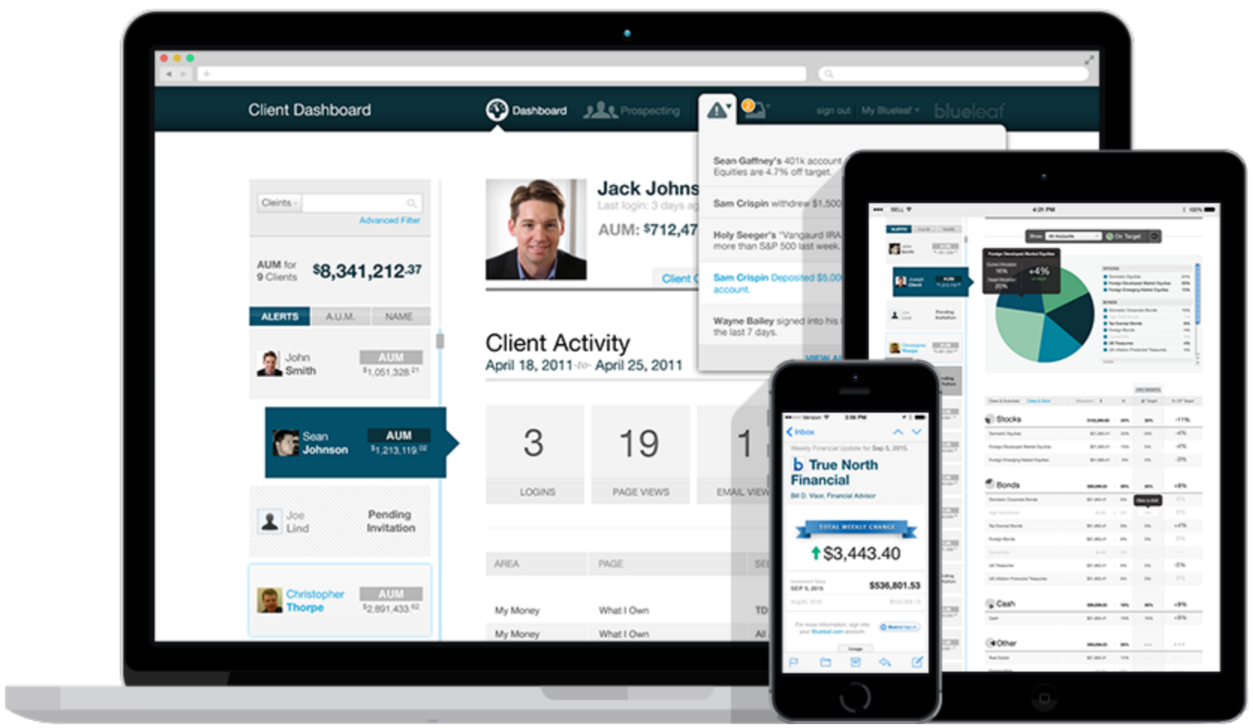

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