Video Marketing Guide

Sun Life

QUINTESSENTIAL
Proven practices of leading advisors

Introduction

Video is the communication medium of the moment. Online audiences overwhelmingly prefer video to other forms of content. By 2021, over 80 per cent of internet traffic will be video[1].

It's also essential for advisors like you. To connect, build and nurture strong relationships, you need to meet your audience where they are. Whether that's Clients, referrals, centres of influence or prospects, they're looking at you online, and they're comparing you against competitors. Video is an opportunity to put your best face forward every time someone googles your name.

This guide walks you through the steps to create a compelling business video and launch it across multiple channels, including how to measure your results.

History of the video program

What started as a pilot with five leading advisors across Canada has grown into a full-fledged video marketing program. As demand for video consulting grew, our team developed a complete self-serve training curriculum that empowers advisors and their teams to own their video from conception to launch. This guide, accompanied by seven short overview videos, is based on over 15 years of combined digital marketing expertise in the financial services sector, including video, and the experience of working with some of Canada's top advisors to deliver high-impact, measurable video campaigns.

[1] Cisco Visual Networking Index: Forecast and Methodology, 2016–2021.

"

The internet now shapes nearly every aspect of a consumer's purchasing decision."

– Business Development Bank of Canada

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Module 1 – Planning

The process to create your video takes about one full day of effort on your part, spread out over six weeks. The process to launch your completed video, including uploading, posting and sharing, ranges from 6 to 15 hours, depending how comfortable you are with computers.

Plan for a budget of $2,500 to $5,000 (prices will vary, but in our experience, this is a good ballpark).

You'll also need to commit to managing any internal reviews and approvals. It's extremely important to loop all the relevant parties in before you start production. If applicable, speak with your legal, compliance and marketing departments to understand any restrictions (on both the content and the eventual launch), and to set expectations for any necessary reviews.

If you aren't comfortable with basic software interfaces, you may need to assign certain video launch tasks to a team member or an external resource. All our recommended software platforms are user friendly and have excellent help resources.

Five steps to creating your video

Define the goal of the video

Create concept & key messaging

Meet with video company

Finalize call sheet and visuals

Lights, camera, action!

Optimal video length: 90 seconds
Time investment: ~ one day (spread over 4-6 weeks)

Choosing a videographer

Sun Life has a roster of qualified independent third-party videographers with whom we've negotiated competitive pricing. Contact your Sun Life Financial relationship manager for details.

If you choose to source your own videographer through Google or a referral, make sure to do some due diligence before signing them on:

- Look for someone who has worked with advisors or other financial professionals before.

- Check out their website and online portfolio. If they don't have one, they're not a good option.

- Watch several videos from their portfolio. This is your investment, so be judgmental. How clear is the message in the video? How does the person look? Is the footage flattering? Is there variety in the imagery, as opposed to just a talking head? Is the quality consistent across the different videos? Show samples to people whose opinion you trust to gauge their impression.

- When you've chosen two or three potential candidates, schedule initial meetings or calls.

- In these meetings, ask them to outline their high-level process. At a minimum, a videographer needs to be prepared to provide:
    - A pre-production call (minimum two hours).
    - A call sheet: an outline of the shoot that specifies such information as locations and who will be present from your side (team members or family).

Module 2 - Key messages & how to structure your story

Step 1: Start with your why

Your video is going to be only one to two minutes long – make this very clear to your videographer right from the beginning. Otherwise you'll have a lot of trouble editing your video later on.

This concise length means you have to focus your message, and you need to start by identifying the wider purpose behind your work.

Use our three-part template to develop your story (next page). You can complete this on your own, or book a call or meeting with your videographer to go through it together.

Ask your videographer to create a one-page key message summary. It needs to have four to six bolded main statements, with two or three detail points under each. Anything more and you'll risk running into problems keeping your video short and to the point. Again, reiterate the one-to-two-minute length requirement.

Develop your story

Use the three steps below to create a compelling story that's unique to you and your work. People make connections with why you do what you do – the meaning behind your work. This template is structured to draw on a personal life experience that influenced your professional goals and purpose, and its value to Clients.

Formative Experience **Bridging Anecdote** **Client Benefit**

Formative Experience

Allow your story to tell your audience who you are, instead of telling them directly.

Through our experience working on video edits, we recommend trying to hit all these points while keeping the anecdote to 20–30 seconds. It can be difficult to edit around speech patterns. The tighter the story, the better the edit.

Key questions

- What experiences did you have growing up that contribute to what you are doing today?
- Are there any hardships in your life that allow you to have a different perspective on the value of advice?
- Why are you passionate about the work that you do? What makes you light up? What do you love about your work?
- What motivates you to achieve success for your Clients?

Sample

Parents' divorce – *traumatic experience*

a) Set the scene: Stress from poorly managed finances caused massive strain in parents' marriage.
b) Describe the situation: Eventually money tore the family apart.
c) The lessons learned (this lesson should be relevant to your Clients):

- Having financial security is central to family well-being.
- If parents had had more guidance and financial advice, they might've been able to avoid the breakdown of the marriage.

Bridging Anecdote

Express how that formative experience influences your current work.

This is how you communicate your empathy without directly stating that you have empathy. Here, you tell your audience that you have been in their shoes.

Key questions

- Why are you passionate about solving Clients' problems?
- How has your past experience helped you to relate to your Clients?

Sample

I know first-hand how even strong marriages can break down because of money. And the breakup of a family can cause even further financial strain – it can take a long time to get back on your feet.

An advisor's role goes beyond the numbers. I make sure my Clients are comfortable talking to me about the most personal aspects of their finances. I'm dedicated to helping families communicate about money, and uncovering destructive financial patterns before they can cause damage.

Client Benefit

Why is what you have learned relevant to prospective Clients?

Key questions

- What emotional benefits do you help Clients achieve (financial security, peace of mind, confidence in their future)?
- Is there anything you can say to potential Clients in this video that will give them a perspective shift? An “aha” moment that allows them to think about these challenges differently?
- What message do you want to leave people with? What do you want them to do after watching your video?
- How does the work that you do impact people’s lives for the better?

Sample

Communication is a barrier that people have to overcome before they can achieve financial well-being. I often tell families that the harder the conversation, the more important it is to have it. Sweeping things under the rug makes it worse. I help Clients develop a level of trust and comfort that allows them to overcome the communication barrier. The result is strong financial health, and the preservation of families.

Module 3 – Pre-Production

Pre-production refers to preparing everything other than your key messages, which you've already nailed down. Now, it's time to consider the logistics and other creative elements that will bring your video together.

Book a two-hour meeting or phone call with your videographer for a pre-production meeting.

Pre-production meeting agenda

Goal: *to determine / confirm the overall feel, content and look of the video*

- Feel/impact: How do you want viewers to react?
- The story and its elements: What is the "plot" of your video?
- The information transfer/key points: What are the highlights?
- Available resources of the advisor, staff, Clients, facilities, outside locations
- Intro: How will you draw viewers in?
- Closing/call to action: How will you end the video? What would you like viewers to do after watching?

B-roll

B-roll is supplemental or alternative footage intercut with the main shot. You don't want your entire video to be you speaking to a camera. Consult with your videographer on what kind of B-roll you might include. A few ideas:

- Involve your team or family if they are relevant to your message. Coordinate their time in advance of the shoot.
- Use location shots. Interior (your office or home) and exterior (local scenery) locations make great visual additions.
- Include photographs or clips from other videos. Some of the advisors we've worked with shared family photos or home video in cases where family members didn't appear in person. If you're talking about your childhood or relatives, the extra visuals help bring the story to life.

A note on compliance: *Everyone who appears in your video must give their consent. When you're shooting B-roll, your videographer must ensure they avoid capturing any identifying information, such as street names, addresses or faces of people who didn't consent to appearing in your video.*

Your videographer has to include plans for B-roll in the call sheet to make sure logistics are covered. Keep a copy of the call sheet handy for the shoot, and provide copies to any team or family members who are appearing in your video.

Other planning considerations

- Think about what you'll wear for the shoot. If you're filming footage for more than one video, such as an individual and a business video, have a couple of options on hand. Lots of online resources offer tips for dressing for the camera, like this.

- Ask your videographer if they provide basic makeup. Even just a light dusting of powder can help you look polished in any light.

- If you're concerned about speaking candidly in front of a camera, a teleprompter is a last resort. You can have one ready as a backup and try speaking without it first. Ask your videographer in advance if they can provide one. Some teleprompters sit directly over the camera lens and are invisible to the audience, to hide the fact that you're reading. Here's an example. Your videographer will need time to set it up, so schedule this in your call sheet.

Module 4 – The Shoot

Step 2: Create your video

Bring a copy of your call sheet with you, to ensure you don't miss any shots or B-roll during the shoot. Very few people feel completely comfortable on camera. Remember, your videographer will select your best shots and audio when editing. Your goal is to speak naturally, as though you're having a chat with someone at a dinner party. Take a warm, conversational tone.

Your videographer will give you tips throughout. If they don't, ask for specific feedback on your body language and presentation. If you're rambling on, look for suggestions on how to break up the message. Long, unbroken speeches are harder to cut in the editing room.

You'll also need your videographer to keep an eye on your appearance. If your tie goes askew, a piece of hair is sticking out or your nose is getting shiny, they need to let you know. You're relying on them to make sure you look good, so tell them not to be shy.

Module 5 – Reviews

This is the fun part, where you get to see your video come to life. Anticipate two or three rounds of edits with your videographer. *Loop in legal, compliance and marketing (if needed) early in the process.*

Follow this checklist to guide your feedback:

Length – If you specified one to two minutes up front, your videographer will be responsible for adhering to this requirement. If you receive anything over two minutes, tell your videographer to condense the video without losing any of the key messages that were in your original one-pager (the one you created in Module 2).

Variety – Are there any long, uninterrupted shots of you speaking? Ask your videographer to break up the footage by cutting to B-roll shots where it makes sense. You don't want to be too choppy, but you want the final product to have visual interest for the audience.

Music – If you're not a fan of the sample track, your videographer can easily replace it. They should look to you for direction on the tone. If they've done their job right, the music will fit seamlessly with your message.

When we're working with videographers, we find that it's useful to provide time stamps with our comments. For example, *"At 1:06, I think we spend too much time on me speaking. Cut in another shot of my team in the office."* This isn't necessary, but don't hesitate to be specific.

Module 6 – Launch

Step 3: No Launch, No Results

When your video is complete, your videographer will send you a download link for an mp4 file. Download and save the file to your computer.

The next step is to promote your video to current and potential Clients. In order for a successful launch, you need to answer two questions:

What platforms do I put it on?
How do I get people to watch it?

What platforms do I put it on?

Post your video

Upload your video to an online video hosting platform

In order for your video to be available for viewing online, you will need to set up an account with an online video hosting platform. A quick google of "free online video platform" will bring up several options. At a basic level, which is all you need for the purpose of your business video, most of these platforms are comparable. We usually recommend Wistia, because it delivers a user-friendly interface, online troubleshooting support (even for free accounts) and excellent analytics.

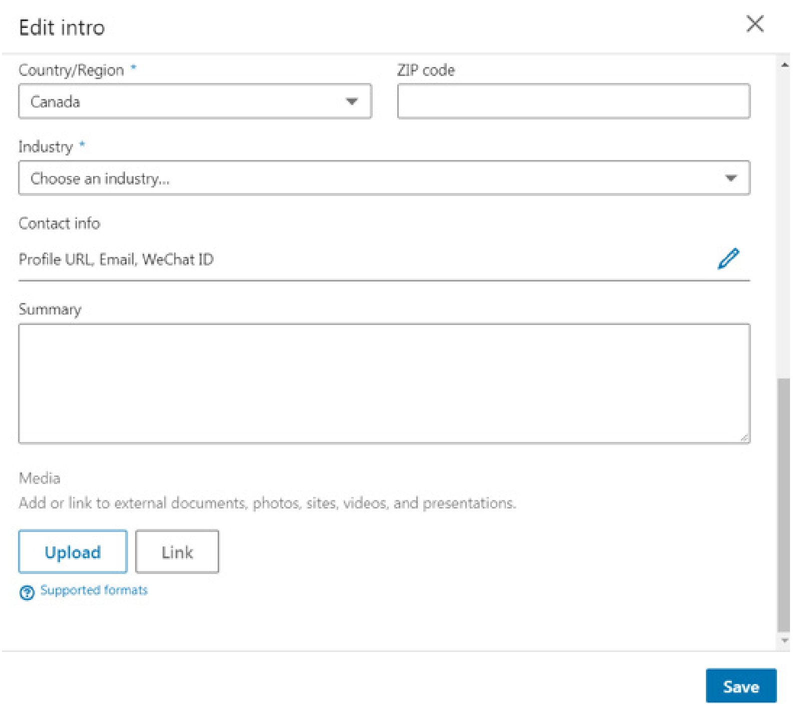
Any video platform provider will have instructions on how to upload and customize your video player. For example, Wistia has a series of short, easy-to-understand tutorials that walk you through the process.

Share your video through social media

LinkedIn personal and business page

On both your personal and business pages, you can easily add your video to LinkedIn by editing your profile.

Scroll to the **Media** section at the bottom of the pop-up editing window and upload your video from your computer's hard drive.



YouTube business channel

See **Appendix 2** for step-by-step instructions on how to set up your own YouTube channel and upload your video.

Post your video on your website

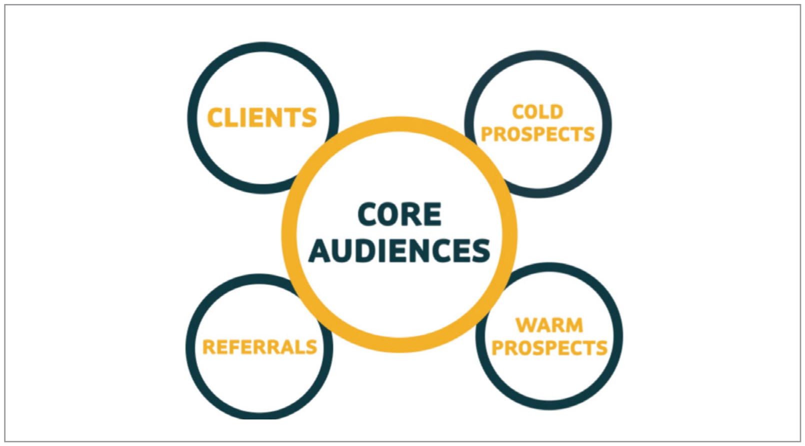
Work with your internal marketing team or website vendor to add your video to your homepage. We specifically recommend your homepage because you want to maximize conversions – the number of people visiting your site who are compelled to stick around. If you put your video on a different page, you're burying your lead magnet.

The process to post your video on your website will usually involve something called an HTML tag. This is a short line of code, generated by your video player, that you can copy and paste into your website HTML. The final result will be a large thumbnail image of the video that plays directly on your website when someone clicks Play.

Wistia has a short video on sharing your video – including how to post it on your website.

How do I get people to watch it?

Promote your video



Now that your video is available on the internet, you can start to market it to current and potential Clients.

A note on compliance:

Before you start your email campaign, make sure you understand and adhere to Canada's Anti-Spam Legislation (CASL). Most platforms have built-in features, like business contact information and an unsubscribe mechanism, to help you comply. Critically, you need consent from everyone on your contact list to communicate with them by email.

Email Marketing Software

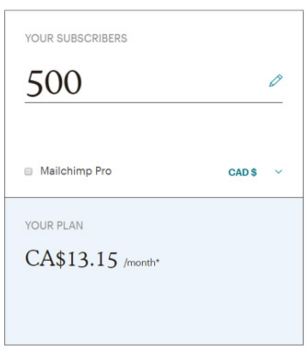
You have lots of email marketing platforms to choose from.

When we work with advisors, we usually recommend MailChimp, but most popular platforms are comparable. Other examples include Constant Contact, HubSpot and ActiveCampaign. Google "best email marketing software" for articles that offer a quick comparison.

For this tutorial, we'll focus on **MailChimp**.

Additional Resource – MailChimp guides and tutorials

MailChimp has a free plan, but if you'd like live support by chat or email to help set up your campaigns, the cost is reasonable. For example, in October 2018, you can add 500 contacts for $13.15 per month.



1. Register for an account

2. Create a contact list in MailChimp

You have two options:

You can create separate lists, such as Clients, prospects and referrals (or however you'd like to segment your audience).

Or, you can include all your contacts in a single list, and add "tags" to create segments in MailChimp. Tags are more advanced, and while MailChimp recommends this approach, they're thinking of a business that could have thousands or tens of thousands of contacts, adding new ones each day. For advisors handling 300 to 500 contacts, separate contact lists are sufficient.

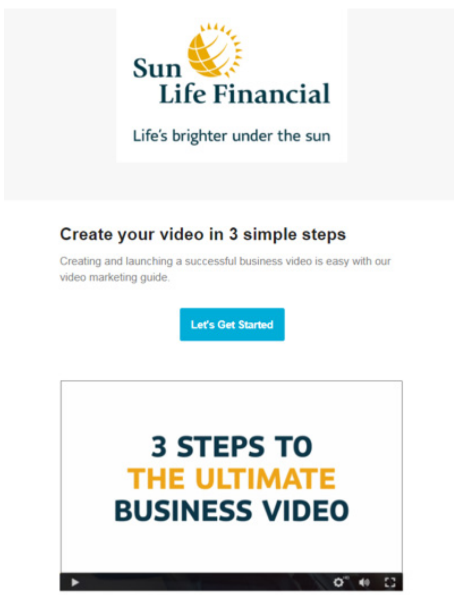
3. Import your contact lists to MailChimp

In your Excel .csv file, include a header row at the top (First name, Last name, Email). This will come into play later if you choose to personalize your email to begin, "Hi <First name>."

1	Email	First name	Last name
2	John.Smith@gmail.com	John	Smith
3	H_gold@sympatico.ca	Hannah	Gold

4. [Set up reusable templates](#) **for each audience segment (e.g., Clients, prospects, referrals)**

For example, here's a template we created for our video tutorial series. This template is for advisors who haven't started yet. We also created a template for advisors who are ready to launch their finished video, and one for advisors who are ready to start reviewing their results.

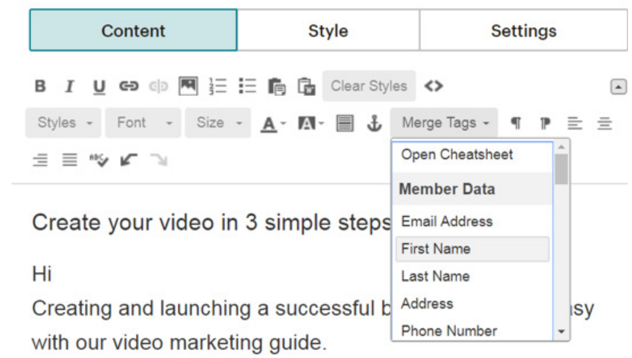


Brand note – Consult with your marketing department if applicable to make sure your template follows your company's brand guidelines.

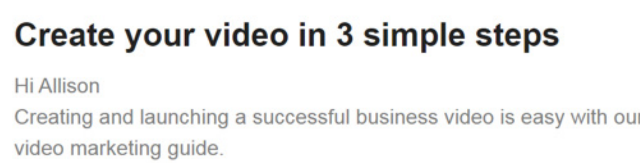
5. [Create your email campaign](#)

This is where your reusable templates come in handy. You can create a campaign using your saved templates for each audience, add your contacts and customize if needed.

Advanced: If you want to greet your contacts by name (e.g., "Hi Allison") you can add something called a [merge tag](#). Merge tags work well and are easy to use, but you must test them thoroughly to avoid an accident (e.g., "Hi *|FNAME|*," which would appear if there's something wrong with the tag). This is how you add a merge tag to your campaign:



This is what you'd see in preview mode if your tag works correctly:



6. Test your campaign

This step is critical.

Consider assigning testing accountability to someone on your team. If you make any change, even a small one, to an email campaign after testing, then test it again.

Preview and test your email campaign

Email campaign testing tips

Develop your messages

That's the how-to part covered, but your email campaign also needs content. Your messages should be targeted to the different audiences you are addressing.

Know your audience

It helps to think about your launch in the context of your target audiences. What are your objectives for each group?

Cold Prospects

Attract the right people

Pre-qualify leads with a clear expression of your values

Warm Prospects

Make a powerful first impression

Invite others to share their story. Build trust before you meet

COI

Warm up referrals

A useful took for your referral partners, and the perfect pre-meeting introduction

Clients

Re-connect with Clients

Show them you appreciate their story by sharing yours

Cold Prospects

Maybe you're still building your Client base, or you've expanded your practice into a new city or region. Your objective is to raise awareness and encourage prospects to learn more about you. You also want to attract the right prospects to limit the number of first-time meetings with unsuitable Clients. For example, if family is a big part of your life, you'll want to attract other family-oriented Clients.

Warm Prospects

Once you've attracted someone's attention, you need to keep the interest going. Your objective is to create a video with a clear call to action. For example, you might invite the viewer to contact you for a meeting. You also need to ensure your launch plan focuses on driving traffic to your website – a powerful conversion engine.

COI

Your objective might be to stay top of mind with key professional partners and community leaders, or to introduce yourself to new referrals.

Clients

How often you meet with Clients will likely vary based on segment, the Client's preferences and needs, and what's realistic for your workload. You video is another warm touchpoint that lets Clients know you're available and would be happy to hear from them.

Target your messages

Given your goals for each audience, you can craft emails that support your objectives.

Cold Prospects

Positioning – As an advisor, I'm privileged to help Clients protect what they value most. Here's a bit about what I value.

CTA – What's important to you? I'd love to hear about it.

Warm Prospects

Positioning – Same as above.

CTA – Let's chat about what's important to you *right now*.

COI

Positioning – I know we've worked closely together, but I recently took the opportunity to formally articulate what drives my work.

CTA – I'm curious to hear how you'd like me to describe your work when I refer Clients to you -- are there particular messages I should highlight?

Clients

Positioning – Because of our work together, I've had the privilege of learning about your goals and values. Revently, I took the opportunity to articulate mine.

CTA – As you add new chapters to your story, please don't hesitate to connect. My door is always open.

Video – A powerful referral tool

A note on compliance:

Run your email copy past your legal and compliance department, if applicable.

Module 7 Ongoing Activation and Measurement

Your video hosting platform and email marketing software will provide reports to help you understand how well your video is reaching audiences.

For the purposes of this guide, we'll stick with **Wistia** and **MailChimp** for our examples. Although the user interface in other platforms will vary, the key metrics and results you're looking for will be the same.

Tracking video engagement

Wistia has an excellent guide to video metrics. The key is that return on investment isn't measured just by view count. If 100 people watch your video, but 90 per cent of them drop off after 10 seconds, that's important intelligence. And even more importantly, you can improve these results through simple modifications to your video's appearance (e.g., the thumbnail image, adding the auto-play feature) or context (the location, words and content surrounding your video on the page). Refer to the Wistia guide for details.

The guide is about a 15-minute read, but it gives you a clear overview of all the ways you can measure engagement. Check out Wistia's video stats overview for a practical idea of how results will display in your account.

68%	Average Engagement	On average, people watch **68.4%** of the video.	68.4% engaged = $\frac{\text{2.9 hours watched}}{\text{total plays} \times \text{video length}}$
123	Total Plays	This video was uploaded 8 months ago.	See daily plays on this video's trends graph.
70%	Play Rate	Out of **119** people who loaded this video on a webpage, **83** people played it.	69.7% play rate = $\frac{\text{83 unique plays}}{\text{119 unique page loads}}$
4	Actions	The conversion rate of this video is **33.3%.**	33.3% 4 of 12 clicked Share. 4 total clicks.

Tracking email effectiveness

You'll be able to see not only who opened your email, but also who clicked on your video. Read MailChimp's report overview guide. You'll also want to review definitions of different metrics related to open and click stats. These pages on open and click statistics include instructions on how to export and download reports. You can easily cross-compare by combining the .csv reports into one Excel sheet.

Following up

Try to schedule time in your calendar, or assign the accountability to a team member, to check results after 24 hours. The key is to strike while the iron is hot. If someone opened your email and clicked on your video, they're primed for a follow up.

How you follow up will depend on your objectives and your email call to action. For example, for Clients, if you left the door open with a warm invitation, you may not need to create another touchpoint to encourage a meeting. However, for a referral or warm prospect, you could connect with them by phone to mention the video, ask if they saw it and discuss what they thought of it.

As a rule of thumb, you don't want to advertise the fact that you're tracking activity. It's a reasonable assumption in this age of digital marketing, but your video is just a natural extension of your efforts to connect.

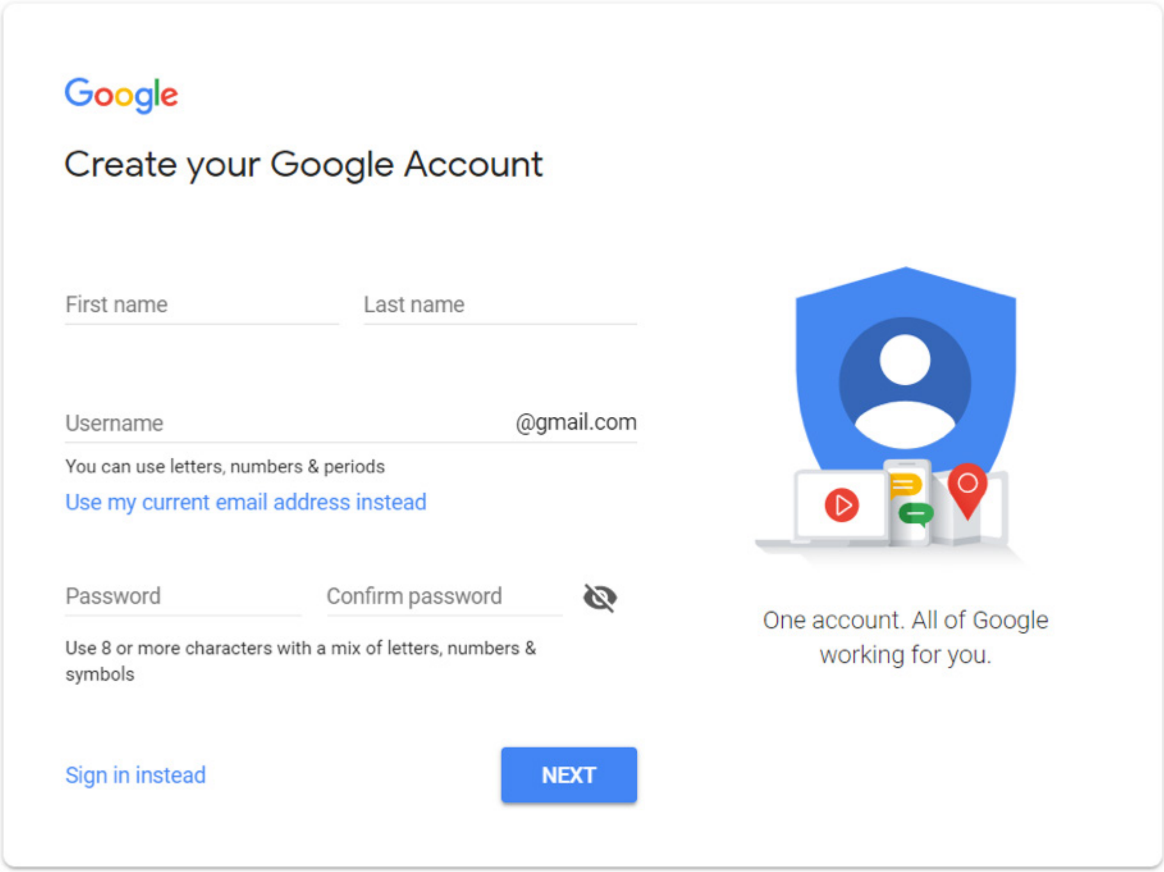
Advanced: A/B testing is a popular (many marketers would say indispensable) tool to fine-tune your video or email for optimal results. When you run an A/B test, you change one variable – e.g., the image, subject line, call to action, time of day you sent the email, intro text, etc. Then, you trigger the A/B test to compare which version performs better. That information will then inform your future campaigns. Marketers know that even small differences can make a huge impact.

Create an A/B email campaign in MailChimp, or explore 4 ways to get started with A/B testing with Wistia.

Appendix – How to set up a business YouTube channel

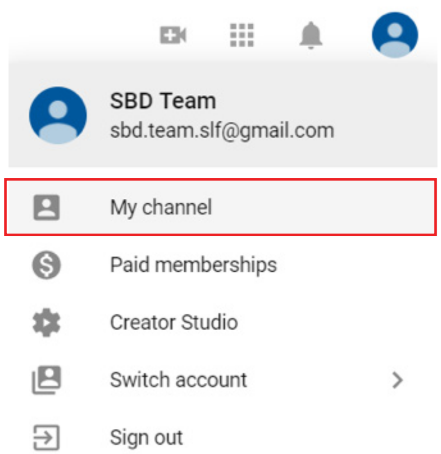
1. Create a Google account with your company name and email
2. Set up a YouTube channel
3. Customize your channel
4. Upload your video
5. Disable comments (optional)

1 **Set up your [Google account]**
Create a Google account. Use your company name and email (to distinguish it from your personal account). This won't be visible on your YouTube channel.

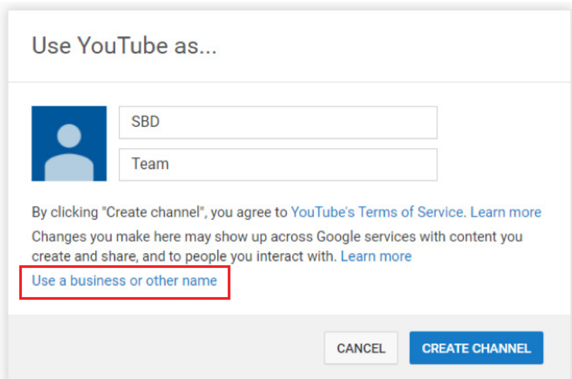


2 Create a YouTube channel

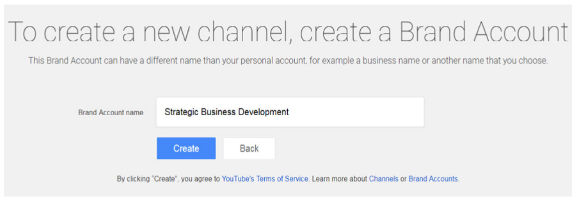
Go to YouTube. In the upper-right corner, click your person icon to expand the drop-down menu, and click **My channel**.



Click **Use a business or other name**.

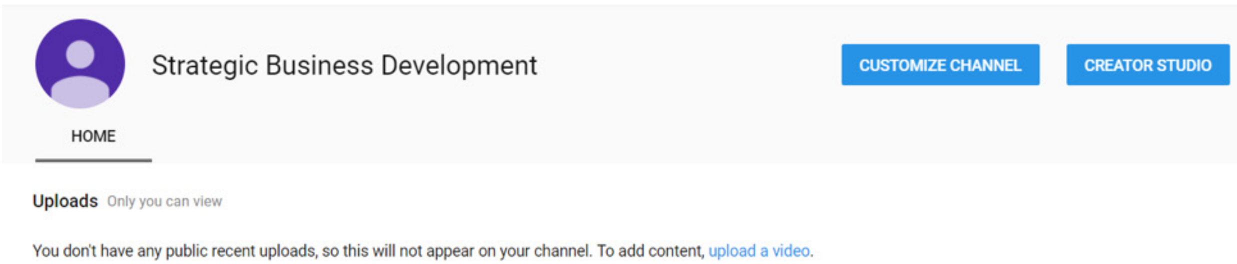


Choose a name for your Brand Account and Click **Create**.

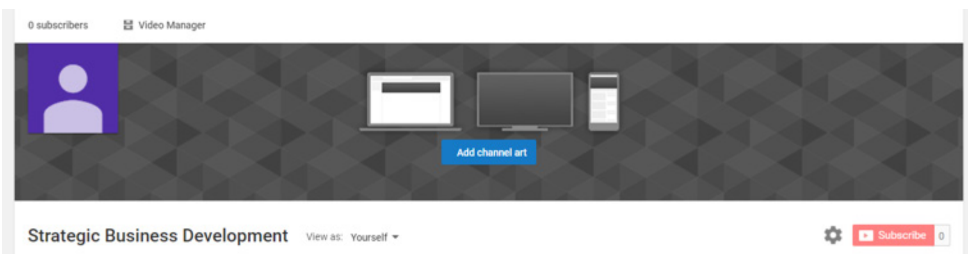


3 Customize your channel

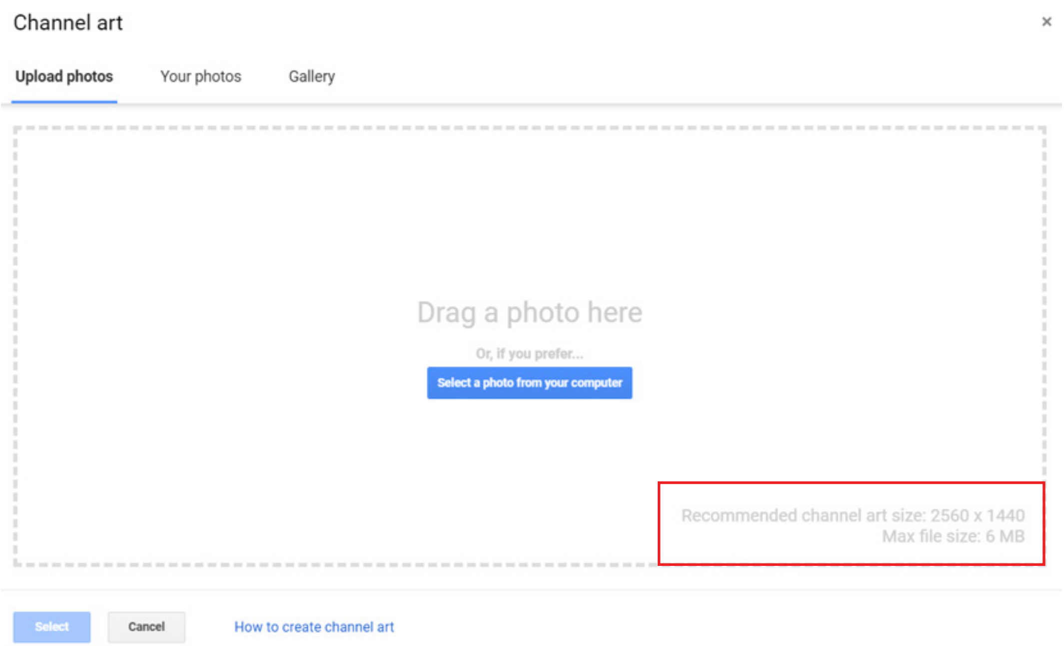
Click **CUSTOMIZE CHANNEL**



Hover your cursor over the area you want to edit. Your profile picture can be a headshot or company logo. Most business channels use a logo.

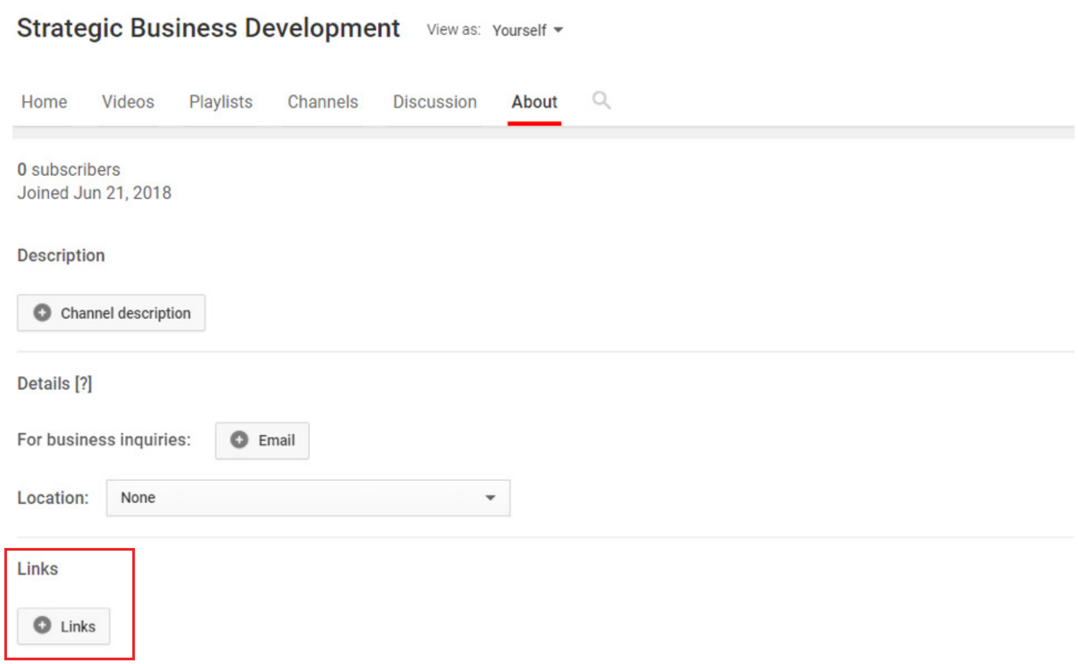


Click **Add channel art** to upload a cover image. The recommended image and file size are displayed in the lower right-hand corner.



You need a high-resolution image that works as a rectangle, that's also consistent with your brand. You can use a photo or a simple coloured background.

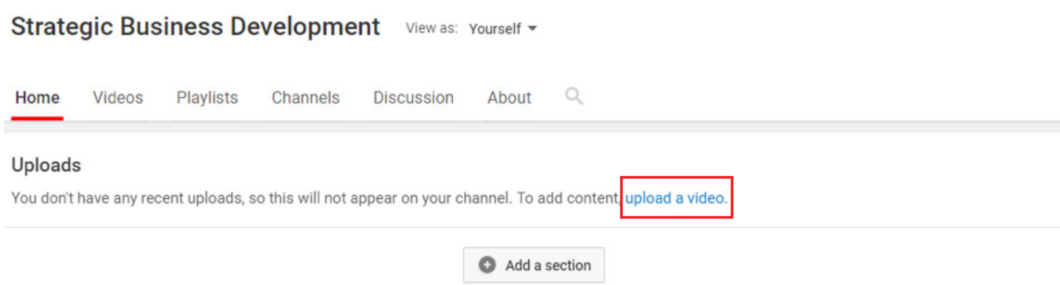
Customize your **About page**



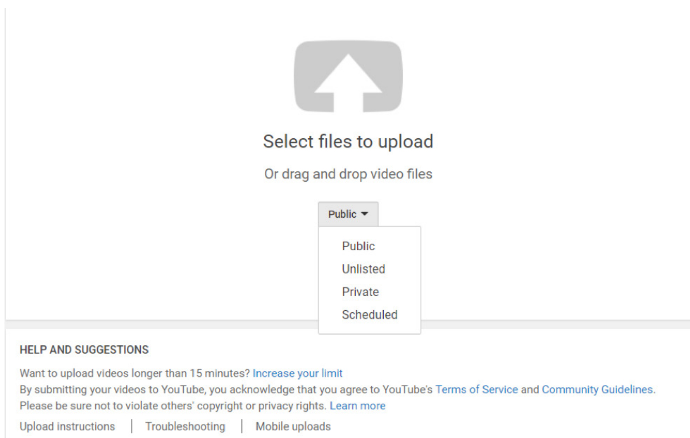
Ensure you add Links to your website and social media pages. The Channel Description should include at least one mention of your name and business name (to optimize for search engines).

4 Upload your video

Click **Upload a Video**

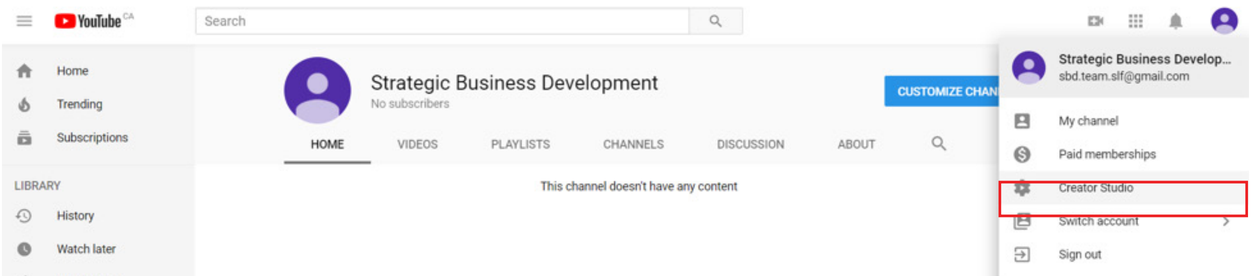


Drag-and-drop or browse to select your video file on your computer. Your video is public by default. You can also set it as private or unlisted (meaning people can't search for it; you have to provide the link), or schedule it to go live at a certain time.

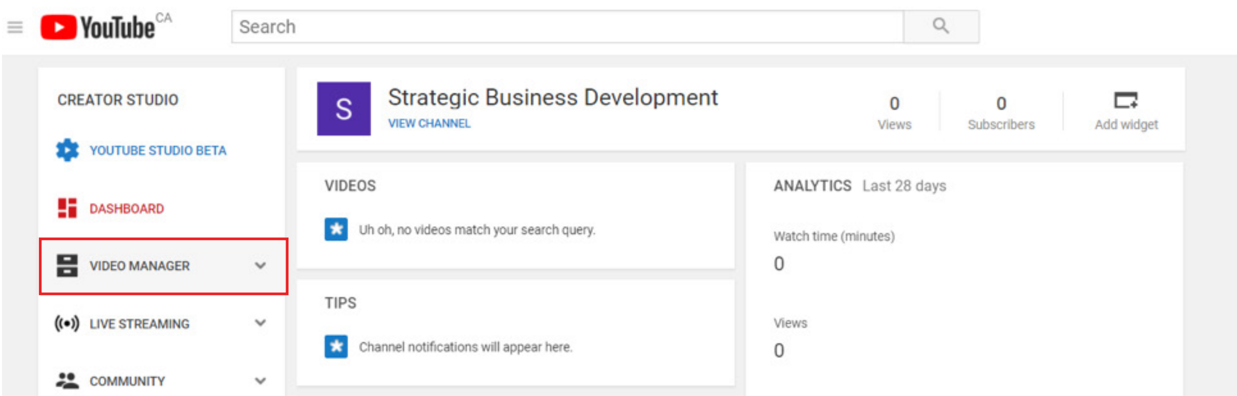


5 Optional: Disable comments

If you want to disable comments, go to the **Creator Studio** in your **account menu**.



Click **Video Manager** to expand the drop-down menu.



Once you've uploaded a video, you'll be able to select it, and then click **Actions** to disable comments.

We help. You grow.

Sun Life