

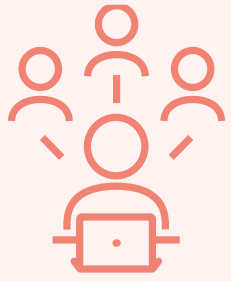


# ELEVATING GROWTH WITH THE THE POWER OF VIDEO

Katie Braden, CFP®

11 October, 2023 | BlueStar Business Conference





**Personal** video is the  
**next** best thing to  
being in person.

**WHY VIDEO?**



Halloween horror! Look what popped out of my toaster! I faced my fears and smothered it with butter!



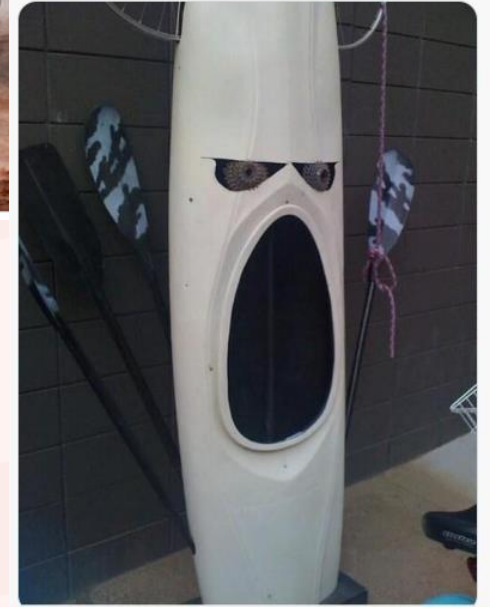
AHHHHHHHHH



Hurry! Run into my mouth!



This kayak will eat you




**We're wired to see faces & expressions**



People don't care how much  
you **know** until they know  
how much **you** care. ”




 Reuters

## South African rand weakens at start of census data release week

The South African rand was weaker in early trade on Monday as violence in the Middle East stoked risk aversion in global markets.   
6 hours ago



 Bloomberg.com

## Why South Africa Is on the Brink of Chaos

Corruption, government incompetence and policy paralysis risk turning Africa's most industrialized nation into a failing state, leaving the...



 AP News

## South Africa's unemployment is a 'ticking time bomb.' Anger rises with millions jobless

South Africa's official unemployment rate has risen to levels similar to those of Gaza and the West Bank, Djibouti, and Haiti.   
Aug 14, 2023



 International Monetary Fund

## South Africa's Economy Loses Momentum Amid Record Power Cuts

June 15, 2023. Reforms are urgently needed to resolve the energy crisis and tackle structural unemployment. Newly released data shows the South African...   
Jun 15, 2023



**What are they  
hearing from  
you?**



@KatieABraden

# What are they hearing from **you**?

- Jargon-filled mass emails
- Confusing charts and graphs (the curse of knowledge!)
- Impersonal empathy
- Nothing





**Richard Saxon**

President, Saxon Financial Group

**Show you care**



@KatieABraden





**CONTENT > PRODUCTION**



# Client & Operation Journey

## Website

### Video

- About you
- Ideal client
- Testimonials
- Process
- FAQs

## Discovery

- 1:1 pre-meeting video
- What to expect
- 1:many post-meeting video/next steps

## Data Gathering

- Pre-meeting video
- Post-meeting video/text: what's next
- How to / WHY

## Plan Presentation

- Pre-meeting video
- Post-meeting video: excited to build ongoing relationship

## Ongoing

- Newsletters
- Introduce new team members
- Social media
- YouTube





# Website



## Our intro call next Tuesday

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Hi Francois. I'm looking forward to our discovery call next Tuesday at 10:00am.


This call is an opportunity for us to get to know each other and see if we're the right fit to help you reach your life and financial goals.

The meeting will be about 30-minutes and will take place via Zoom. If you haven't received the calendar invite yet, or if you have any other questions, please let me know.

Cheers, Katie

**Katie Braden, CFP®**



- 
- Users spend up to **88%** more time on websites with videos
  - **83%** of marketers say that video helps to generate more leads
  - **66%** of people would rather watch a short video about a product or service than read text

# Website



# The power of video

- Amazing medium to inform, connect, change conversation
- Easily differentiate yourself
- Builds a human connection
- Faster than writing
- Creates 'celebrity' effect
- Quickly builds know, like and trust
- Improve client experience





# Getting Started

By getting out of your own way



**Stand Up**

**Smile**

**Eye Contact**





# Framing & Background

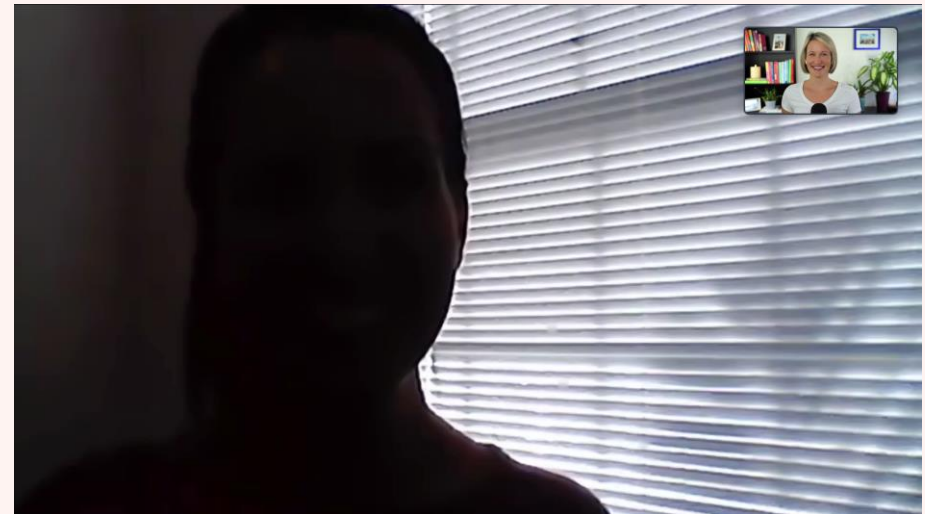
- Camera at eye level
- Less ceiling
- More room below your chin than above your head
- Have a real background
- Space for natural hand gestures



# Good Lighting

## Internal & External Meetings

- Natural light is best
- Ring light
- Webcam light
- Softboxes
- With and without glasses



# Good Audio

## Internal & External Meetings

- USB microphone
- Scissor/boom arm
- Lav mic for phones
- Test your audio
- Get Krisp.ai



# Easy Video Tools



Easiest for quickly and easily sending video emails within Gmail, Outlook, Salesforce, etc.



Best for those that already have it and like it





It's about **how** you make  
your audience **feel.**



# Birthdays & Gratitude

- To prospects
- COIs
- Clients
- They'll share & talk about it
- "Only message I replied to today"

Happy Birthday, F !!  
videoask.com

F, CFP® • 12:29 PM

So....

That was awesome! Lol

Thank you so much

You're on to something, video is so powerful 😊



Katie Braden, CFP® • 12:29 PM

😊 You're welcome!

Yep! That's why I love it so much.

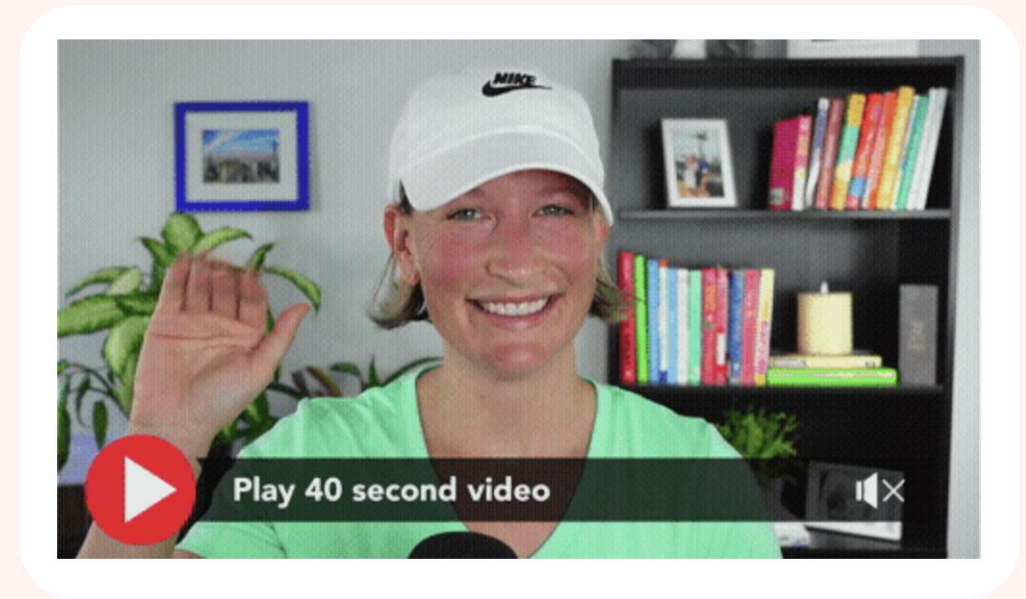
F, CFP® • 12:30 PM

I was literally smiling as I watched



# Intros & Thank You

- “Wow! That was cool.”
- Quickly build personal rapport
- Thanks for referrals, opportunities, resources, etc.
- “Thanks for your video. It’s so good that I’ve shared it with my team.”



# Before Prospect Meeting

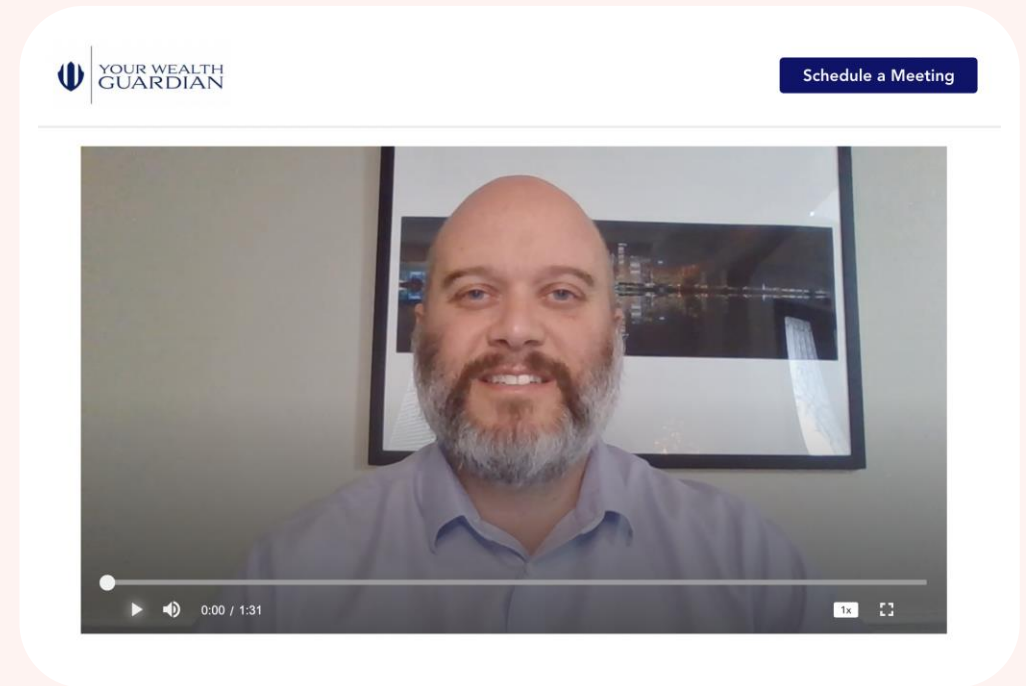
- Differentiate yourself!
- Build trust and rapport
- What they can expect
- Meeting instructions
- Anything they need to complete





# Scheduling Client Meetings

- More personal and engaging
- Much higher response rate
- Easily link to schedule
- Can do 1-to-many or 1:1



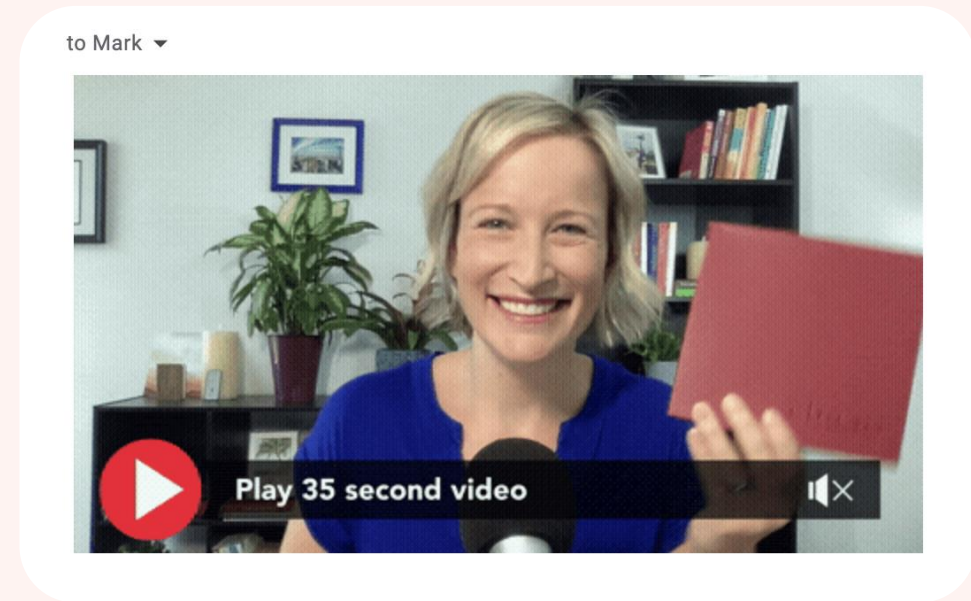
# Short, Timely Updates

- Why you wrote a blog
- Current events
- Relevant changes
- Valuable, non-financial topics
- Newsletter highlights



# Video Emails

- More engaging
- Faster than typing
- If you could say it in a voicemail, you can say it on video
- Condolences, apologies, congrats, thanks, details, etc.
- Get compliance approval first



”

To be alive is the biggest fear humans have. Death is not the biggest fear we have; our biggest fear is taking the risk to be alive - the risk to be alive and express what we really are. **Just being ourselves is the biggest fear of humans.**

## PROGRESS OVER PERFECTION



# Katie Braden, CFP®

- Photography degree, RMIT University, Melbourne, AU
- Started virtual practice in 2013
- Worked with advisors in 35 countries
- Founder, Advisor Video Marketing
- Private Pilot
- @KatieABraden







@KatieABraden



**ADVISOR**  
VIDEO MARKETING

Questions?

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Talk to me