



Send an informal video message when you want to add a personal touch to your client communications, especially when a face to face meeting isn't convenient.



### When is a video message a good idea?

#### To follow up after a meeting:

- Share your enthusiasm for the meeting and thank clients for their time.
- Recap the discussion in two to three key points.
- Go over your action items and next steps.
- Remind clients of their action items.
- Let them know you're available to help.
- Request a follow-up. For example, you can say, "Call me to discuss our services" or "Let me buy you lunch to talk about our products."
- Thank them for their time.

#### To introduce yourself and request a meeting:

- Let potential clients know who you are.
- Give the reason for your video. Describe a problem you can solve.
- Introduce yourself and give a brief answer to the question or request.
- Thank them for the opportunity to talk about doing business together.
- Request a follow-up. For example, say, "Give me a call and let me know how I can help."

# Follow these guidelines to create simple, clear and meaningful videos

## General Tips

- **Keep it brief.** Aim for a 1-minute video. Don't shoot for longer than 2 minutes, because you may lose your audience. Respect the viewer's time by keeping it short.
- **Keep it real.** If you mess up, you can start over – or not. These videos are an informal way to communicate, so imperfections can be a good thing. Remember, you want to sound authentic and sincere.
- **Focus on key points.** Before shooting, jot down a few points that you want to cover. Use these as your notes, but not as a script. Talk like you would in person – using words you'd actually say – but avoid rambling.
- **Grab their interest.** Mention something you know the client is interested in, such as a hometown sporting or news event. Avoid topics that may be controversial or divisive.
- **Do a little research.** Check with your back office or distributor about products and services you're allowed to mention.
- **Address a single person.** Create videos for one-to-one situations — not for multiple recipients. And don't mention or include third-party individuals.

## Shooting Tips



- **Shoot horizontally.** For iPhones, make sure the “home” button is on the right side when held horizontally, so the footage will be right side up.
- **Keep the light on you.** Make sure your main source of light is behind your camera. For example, position yourself in front of a window, with the camera facing into the room toward you. Avoid back or side lighting.
- **Quiet on the set.** Shoot in a quiet space and manage the background noise, if possible. Turn off or mute other devices.
- **Keep it steady.** If holding your phone makes your image blurry or jumpy, use a simple tripod or rest your phone on a solid surface.
- **Get close.** For the clearest sound, position your phone as close to yourself as possible.
- **Do a test video.** After you've chosen a spot, shoot a few seconds of video. Then play it back to check the lighting, sound and background.

## Sending Tips

- **Review the video** one more time before sending it by email or text.

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