

Go Digital!

2021 Social/Digital Guide with Resources & Equipment List



MORNINGSTAR[®]

Social/Digital
Hub

POWERED BY

IMPACT
COMMUNICATIONS, INC.

**Find recorded sessions from the September 2021
virtual event and much more at:**

www.SocialDigitalHub.com

Ready to “up” your digital game? This guide and corresponding videos can help you do just that. Impact Communications is proud to bring you the content in this Social/Digital Guide as well as the additional videos and information you will find based on the virtual presentations that occurred in the Social/Digital Hub as part of the Morningstar Investment Conference US digital experience in September 2021. The 2021 Social/Digital Hub was, once again as in years past, powered by Impact Communications, Inc.

Start by reading the transcripts and/or watching the videos. Then, review the Resource & Equipment List that starts on page 11. You will probably have lots of questions – most advisors do. After all, there are over 80 links provided and every advisory firm’s need is slightly different.

Here’s how to get personalized help and advice:

1. On September 24th, we will be drawing one advisor’s name “out of a hat” – that lucky winner receives a podcast microphone set (see page 5 for image and link to enter the drawing). In addition, a second lucky winner will get to work personally with [Jonny Swift of Impact Communications](#) via two virtual consulting sessions. In the first session, you’ll discuss your social/digital plan with Jonny and he’ll provide the advice you need to take your communications to the next level (including recommendations for any new equipment you may need to buy and where to get it). In the second session, you’ll do a tech check and trial run with Jonny’s help and advice.

Click below to enter the drawing.

You will be able to indicate which prize you prefer if you are the winner.

<https://www.socialdigitalhub.com/2021micusgiveaway.html>

2. In the event that you are not one of the lucky winners, don’t worry. You can still get the help and advice you need from Impact Communications. [Click here to schedule](#) your first of two 1:1 appointments with Jonny Swift. You’ll send a check for \$300 for the two professional consultation sessions.

Additional tools, information and details about the Social/Digital Hub are available at www.SocialDigitalHub.com.

Inspector Gadget

A show-and-tell session where two tech-savvy Millennial dudes will show you all the cool gadgets and gizmos they are using to produce content on-the-fly, on-the-road, and in-the-office for advisors just like you.

Want to know how to take your audio/visual skills to the next level?

Colin and Jonny are coming to pump you up.



Recorded for use by Morningstar for the #MICDigital #MICUS event Sept. 2021 in the #SocialDigitalHub

Video presentation: 20:41 minutes

Accessible in our archives here:

<https://vimeo.com/showcase/8782027/video/455360979>

The tools and systems mentioned in the Inspector Gadget session are shown in **purple font** in the transcript below. A more comprehensive and organized list is available in the downloads area of the virtual booth.

INSPECTOR GADGET: VIDEO TRANSCRIPT

Jonny Swift: Hello, and welcome to the Virtual Social Digital Hub for the Morningstar conference. I'm Jonny Swift here with my colleague Colin Swift of Impact Communications. And we're going to be covering some gadgets and gizmos today that will help you do webinars, podcasts, and videos better, which are obviously more important than ever in the digital age that we're living in with quarantine and everything.

Colin Swift: Absolutely, especially with Covid and quarantine going on right now. **Zoom**

meetings and webcams have definitely risen in the amount that you're going to be doing. With no end in sight of, it's probably going to be the way it's going to go for a while now. So, there's definitely a few ways you can really boost your presence, even just for a normal zoom meeting, or webcam meeting.

Jonny: Exactly. And like you were saying, it's more important than ever to show up on camera and show up on video and audio in a good way. And some of the things we're going to show today can help you do that.

BETTER WEB STREAMING

Jonny: So. First, we're going to talk about how you can do better with webinars and webcams. So, if you don't already have a webcam, that's built into your computer. If you want to get a better one, this one here is called a **Stream Webcam**. It's very nice. High quality.

Colin: It just literally sits right onto your computer here. You place it right up. You plug it into your computer, view it via USB. And then the camera and line are attached all in that one little pocket there.

Jonny: It's just a nice, easy tap to turn up the brightness and turn it on. High quality webcam and you get your light built right in. I am happy with the webcam built into my laptop. So, I just use one of these, these a simple desk clip on ring lights. And this also plugs in via USB, turns up brightness, and this really helps me in my home office to get a better lighting on my face for all kinds of webinars and presentations online.

Something else you could use is just a simple **selfie ring light**. You can clip this onto your phone and clip this onto your laptop, just as so. That's another alternative that's a little bit cheaper, a little bit easier. Here's just another nice little **auxiliary light** that can plug into your auxiliary jack on your phone, you might need a little **Apple adapter**, but this is great and very handy for going out and getting on the road and even at home.

So obviously you want to have good video quality with a nice webcam. You want to have good lighting and next comes good audio. So, you want to have some kind of better microphone than your computer audio in most cases. And a lot of times you just need something like this – a **Snowball mic**. We often just use our **Apple Earbud** headset with the built-in microphone. That's even a step up that's a little bit better or else you can use a **USB microphone**.

Colin: Yeah. The **iPhone earbuds/mic** would be a great mic to use. If you want to take just another step up in your audio quality, you could use a USB mic, something like this **Snowball mic** here. It's perfect. It can be set up to do a 180 or a 360 sound capture. So, if you're going to have multiple people in the room, it's a great mic to have. Again, it's just a simple USB to plug into your computer or whatever you're recording with and it works great. Again, it's another step up from just your basic iPhone mic or headphone mic that you get with your iPhone purchase.

Jonny: That fits great on your desk. Obviously, there are lots of different USB microphones they can use. And I'm probably gonna put a few up here up on screen for you to check out as well. The **Blue Yeti microphone** is also another popular one that people like to use. And they even use more of a **podcasting microphone** like this. This is actually our prize in the Social Digital Hub this year. We have an **XLR podcast microphone** here, but this one's actually USB (the **Maono USB Condenser Microphone Set**). So, you can use these items with your computer, for podcasting, for webinars, for all types of stuff. So, if you want to take an even bigger step up from something like this, you can go for a podcast microphone with a nice arm to clamp onto your desk, really easy to manage. And we are looking forward to seeing who the lucky winner is for this.

ENTER TO WIN THIS PODCAST MICROPHONE SET!
<https://www.socialdigitalhub.com/2021micusgiveaway.html>



So, continuing on with microphones and better-quality audio, lots of advisors nowadays are using podcasts to reach a larger audience and to reach their clients and their prospects to continue to drip out good content. And lots of advisors I know are just using USB microphones like this. Either the **Blue Snowball** or the **Blue Yeti**, or there's lots of other options out there for good USB microphones, that capture good audio. And again, the prize that we're going to be giving away is a USB podcast, microphone. This is being **Maono USB Condenser Microphone** set, and it is great for your basic podcasts. It's not going to be absolute professional quality podcasting audio, but it's almost there and it is plenty good for advisor podcasts, and industry podcasts.

And we have an XLR version of a podcast microphone here. This is a top-of-the-line **Rode microphone**, and this is a normal microphone input. XLR is what it's called. And so, if you're going to go with this version, you have to plug into a **Zoom Recorder**, but obviously the USB Maono mic plugs straight into your computer, so that's a little bit easier.

Colin: Now, there are, there are a little more perks to having something with the XLR, with the Zoom Recorder. The **Zoom Recorder** itself does record audio by itself. It does have two microphones right here. So, it is another great way to just get some simple recording if you needed just some simple audio tracks. The other thing it's great for is it works well with if you were going to do some type of video production. The zoom recorder is a great way to have a step up in your audio for your video production as well.

Jonny: Yeah. And it just serves as a good backup audio source often and is great for taking around with you at conferences. If and when those get resuming again, great for on the go and for capturing audio, wherever you need to. And so, you can hook an XLR microphone right into it, or use it on its own. We have a nice little **handy desk tripod** that goes with it. And so that is great as well for capturing your audio for podcasts.

BETTER VIDEO RECORDINGS

Jonny: So advisors are also using video often now to create new good content to reach larger audiences and video is more important than ever for showing a personal side of yourself for showing prospects what kind of person you are and what kind of advisor you are. So, you want to be able to have stable quality video. You want to be able to have higher quality video. You want to be able to have good sound and you also want good lighting.

So, first things first, when you're capturing video is you need a tripod. So **mobile tripods** are easy to find. There's lots of different kinds out there. You can use something like this here. This is called a **Fuji Tech Stick**. It's a nice normal size tripod. It's nice, easy, and light and easy to pack up and travel with it. It's also going to fold up and function as a selfie stick. And we have an extra phone mount holder here on the side of it. But you can get a cheap tripod like this **Gorilla tripod** for about \$20 bucks. And those come in handy all the time. You can also get something more heavy duty like this guy back here. And that's a really nice and very sturdy. So obviously the sturdier the better, especially if you're going to be filming outside or anything like that. What we like to use though, and what we filmed one of our presentations earlier on there's this ring light tripod. So, this kit is about a hundred bucks. It comes with a really nice wide-based, stable tripod, and it has this ring light come with it. So, obviously when you're capturing video, sometimes you might need better lighting. Sometimes there's not good natural lighting sources. And so, something like this can really help capture better video.

Colin: Absolutely. And you know, sometimes one of the things that you might run into is a space issue. Maybe you're stuck at your desk and you need to film something at your desk. Well, they have, they also have tons of desk cameras, the same thing you're using for your Zoom recorder. You can easily attach a camera stand to it, and then boom, you have a tripod ready to go for your desk.

Jonny: Yep, exactly. So small desk tripods, if you're gonna be filming at your desk, that's great. Or you can set up a larger tripod across the room, but these **big ring lights** are really nice because you get the tripod and your light built into one. Oftentimes you have to buy an external light and set that up on a separate tripod. But these are really nice for being an all in one system. They get pretty bright and it's on a dimmer system. And so, you can center your phone mount right in the middle of here and put your phone right in the middle of the ring light. So, you're getting direct lighting onto your face or whatever you're trying to capture.

So, when you're using the ring light, one thing to be aware of is if you wear glasses, like I do, sometimes you can get a reflection and the glare in your glasses. So, if you are filming and you are going to use a ring light or an external light, it's nice to take your glasses off if you can or at least position the lighting to where you're not going to get a lot of reflection and glare. And you know a lot of times you need the external light, but if you're able to get good natural light, then you don't necessarily need it. That can be really nice and a good.

Colin: A good tip to go by when doing video production is natural light is the best light. You really want to use something like the ring light as something to get rid of shadows when you can't have natural light to really brighten up your face, naturally. Natural light makes you look the best.

Jonny: Exactly. And you know, sometimes you need to use artificial light and that's just fine. If you already have a tripod and you don't want to spring for the ring light kit, even one of these **USB microphones with built in light** is fine; you can plug it in externally to your computer and position this in a good way to provide some extra lighting for your face.

Colin: And again, the selfie light, another great thing. You could put it on your camera and right onto the tripod, no issue there. And you get some extra light that way as well.

Jonny: So now that you have gotten your tripod for stable video, and we've talked about lighting, you might be thinking about what you want to capture your video with. And a lot of people think that they need a **DSLR camera** like this, but we actually just like to use our **iPhone X's**, which have great quality video. They're easy to travel with and they produce just as good a video quality nowadays.



Colin: With everyone investing so much into their phones nowadays, you might not want to invest another \$400 or \$500 into a DSLR camera like this. Now while they are great and they are great for photos and video as well, they will up your production value immensely. Your phone will do that as well. They've been able to put such great cameras and phones nowadays. We are filming with an iPhone currently right now, iPhone X. We have an iPhone here on our **gimbal** that we'll talk about here shortly. The phone cameras nowadays have really upped their value and you can really make a professional production. It's something that you carry in your pocket.

Jonny: Exactly. So, if you have a DSLR camera and you want to experiment and try that out and use that as well, feel free. But I think plenty of you are going to be happy with the footage you capture on your iPhone and all of these tripods that we're talking about most of them come with these phone mounts or similar kind of looking phone mounts. And so, it's easy to screw a **phone mount** onto a tripod, and plenty of systems like this, the one where you can even get an external microphone attached to the phone mounts.

So, let's move into audio. Obviously, after you capture better quality video and you have a stable video with a tripod and you have your good lighting, then the next thing is to get good audio. So, for your phones, you're going to need an **auxiliary microphone** with an inbound plug. And if you're using an iPhone, you're going to need one of the **Apple adapters**.

This is a nice **Comica directional microphone**, which is just great for pointing in whichever way that you're filming. This little phone mount allows you to connect the Comica microphone (it comes with the Comica kit); you can put the microphone right on top of your phone mount so you can have an all-in-one system for your phone and for your audio.

Colin: You're actually looking right now at a replica of what we're using currently to film this video for you guys. So, it's not something that we're preaching. We practice it too. This is pretty much the same setup we're using right now.

Jonny: These Comica mics are a step up from your built-in microphone in your iPhone. It has this whole kit where this thing screws off and you can use that as a grip and walk around and get mobile footage while still capturing higher quality audio. Something else we'd like to use too capture audio for our iPhone footage is just your **basic lavalier mics** that plugin via auxiliary as well. You can clip this right onto your lapel and these works splendidly too. Especially if you're going to be outside or in a loud setting. Obviously if you have **lavalier mics and an extender cable** doesn't hurt and also a splitter. So, if you're going to have two people on camera at once, you can plug two people in at once and captured both of your audio with separate lavalier mics.

So, you might be asking yourself if you're alone in the office, how do you do this by yourself? How do you start the video and end the video? Well, a lot of the tripods come with these little **Bluetooth remotes**. If it doesn't come with one, you can buy them separately. They're very cheap and you can start and end the video right from this remote, sync it up to your phone via Bluetooth and that is a great way and a little handy way to do it by yourself as well.

Colin: Absolutely. The next thing you can do, if you have your camera and production and you still want to take that next step up, the next great thing to do would be to add another camera or a second angle. And there's a way to do that as well. One of my personal favorites that we use here is the **gimbal**. Basically, this is for footage on the go. It's not on right now, but if you turn it on it, it is a mechanically-balanced camera. It allows you to hold it and you're able to move and reduce any extra shock. It gets your production a little bit more up there.

Jonny: It's great for on the go. Whenever you're moving, no matter how fast or how hard you're moving, the gimbal captures stable footage. So, if you want to get some action shots, if you want to get some panning shots, that's another nice feature to add to your video.

Colin: Absolutely. And the other thing you could do is also add just a second stable angle and we have another great camera for that too. That's the **Mevo camera**. So, this is a more of a wide angle. This is something that we tend to put in the back for a conference. We'll put it in the back of the room so you can get the entire room in there. This is also all **controlled remotely from your phone**. You can connect it through Bluetooth on your phone. And then again, everything is on your phone. You're shooting, you're controlling your other camera, and doing it all from your phone.

BETTER POST-PRODUCTION

Jonny: So, once you've captured all of your great video footage, you might be wondering, what do I do with it now? How do I produce this? We capture most of our stuff on iPhones. We are big Mac users and a lot of **Apple software** built in right to your Mac is great for producing audio and video. For podcasts, I actually just use **Garage Band**, the free software, obviously for audio editing and production. And for video, we mostly use **iMovie**.

Colin: iMovie is a great base for a video production as well as Garage Band for audio. And again, those both come standard if you buy a Mac. I'm not too familiar with Windows myself, but I'm sure with the laptops and computers coming out today, they'll have some type of similar software available to edit as well. The point I think is that you don't need to go spend hundreds of dollars on some large production software. Again, like your phone, you have that with you ready to go already.

Jonny: Right! PC users out there, you can **Google free video editing software** and there's going to be some options there for you. iMovie and a couple of other of the free ones they're very user friendly, very easy to use. They have cuts and drag and drop, and it's not too hard to learn and do some basic cuts and edits and intro and outro slides.

Colin: It's very easy to learn the other and the other positive with those two programs is there is a lot of help out there on the internet. If you are stuck somewhere with an iMovie or Garage Band you're going to be able to go to **Google or YouTube** and really easily find what you're looking for, which is another, another great thing to use those for since it's easy to find.

Jonny: If you don't want to do the work yourself, or you want to step up the production quality and make it a little bit more professional, you can hire different services. You can go into places like **Fiverr and Upwork** and hire professionals that are going to use something more like **Final Cut Pro** or a more professional video editing software. But I think that you'd be surprised looking at some of those videos side by side and seeing how good of quality iMovie can really produce and its very user friendly.



So if you're looking for more help and tips, advice on any of this stuff, especially video stuff, make sure to go to **AdvisorThoughtLeaderSummit.com**, which is a yearly event that Impact Communications has been doing it for the past few years. That focuses on video skills, capturing video, being on camera, and performance skills. You can find out when those dates are going to be this fall. That will be another great resource for you can learn more about being on camera and capturing good quality video.

So, you know, years ago, when we would go to conferences, we used to bring these little **FlipCams** with us. And we thought these were very cool at the time, very handy and portable. They captured decent video and you could export it to your computer via USB, but these used to be cutting edge and just seeing how far we've come, all the great tools that we have at our disposal to capture higher quality video and audio is really fascinating to see how far we've come.

Colin: It really is amazing how much of this stuff, as I said before, can fit in your pocket. So much that you can do a solo and by yourself and really get that professional production out of it.

Jonny: One last plug for our giveaway and we are giving away one of these **Maono USB Podcast microphones**. So, make sure click the link below to enter your name into the drawing for this awesome Maono microphone that can be great for webinars, podcasting, and videos as well. <https://www.socialdigitalhub.com/2021micusgiveaway.html>

So, Colin thank you and thank you all for joining us today in the Virtual Social Digital Hub at the Morningstar conference. We'll see you next time.

###



Resource & Equipment List

Podcast Resources

Podcast Recording Solutions:

1. Zencastr: <https://zencastr.com/> – Cloud-based, online, high-quality audio recording platform, as well as postproduction
2. Descript: <https://www.descript.com/> – Cloud-based, online, high-quality audio recording platform, as well as postproduction, editing, and transcription
3. GoToMeeting: <https://www.gotomeeting.com/> – Application-based meeting software that also works pretty well for podcast recording (audio and video), many plans include transcription
4. Zoom: <https://zoom.us/> – Application-based meeting software that also works pretty well for podcast recording (audio and video)

Podcast Hosting Solutions:

5. PodBean: <https://www.podbean.com/> – Podcast hosting, recording, stats, and distribution with profile page
6. Libsyn: <https://libsyn.com/> – Podcast hosting, stats, and distribution with profile page
7. Buzzsprout: <https://www.buzzsprout.com/> – Podcast hosting, stats, and distribution with profile page
8. Blubrry: <https://blubrry.com/> – Podcast hosting and stats with profile page
9. SoundCloud: <https://soundcloud.com/> – Podcast hosting and stats with profile page

Podcast Editing Solutions:

10. GarageBand: <https://www.apple.com/mac/garageband/> – Audio editing software
11. Audacity: <https://www.audacityteam.org/> – Audio editing software
12. Descript: <https://www.descript.com/> – Cloud-based, online, high-quality audio recording platform, as well as postproduction, editing, and transcription

Where to Publish:

13. Submit to Apple Podcasts (will also submit to Castro and Overcast): <https://podcastsconnect.apple.com/>
14. Submit to Spotify Podcasts: <https://podcasters.spotify.com/>
15. Submit to Google Podcasts: <https://play.google.com/music/podcasts/publish>
16. Submit to TuneIn: <https://help.tunein.com/contact/add-podcast-S19TR3Sdf>
17. Submit to Stitcher: <https://partners.stitcher.com/join>
18. Submit to Deezer: <https://podcasters.deezer.com/>
19. Submit to Pandora Podcasts: <https://www.ampplaybook.com/podcasts>
20. Submit to RadioPublic: <https://podcasters.radiopublic.com/>
21. Submit to iHeartRadio: <https://www.iheart.com/content/submit-your-podcast/>
22. Submit to Radio.com: <https://www.radio.com/podcast-submission>
23. Submit to Pocket Casts: <https://www.pocketcasts.com/submit/>
24. Upload to YouTube: <https://www.youtube.com/>
25. Upload to SoundCloud: <https://soundcloud.com/>

Podcasts Mentioned in the ‘Podcast Wizardry’ Video:

26. NAPFA Mindset Mastery Podcast: <https://napfamindsetmastery.libsyn.com/>
27. Practical Wisdom from ACP Financial Advisors Podcast: <https://soundcloud.com/practicalwisdompodcast>
28. Financial Finesse Podcast from Cathy Curtis: <https://financialfinesse.libsyn.com/website>
29. Wealth Management Today Podcast from Craig Iskowitz: <https://wmtoday.com/>
30. Top Advisor Marketing Podcast: <https://topadvisormarketing.podbean.com/>

Additional Podcasting Resources:

31. Top Advisor Marketing (complete podcast management services): <https://topadvisormarketing.com/>
32. Equipment to start your financial podcast from Top Advisor Marketing: <https://topadvisormarketing.com/equipment-to-start-your-financial-podcast/>
33. Podcasting Resources from Top Advisor Marketing: <https://topadvisormarketing.com/podcasting-resources/>

Equipment List for Better Podcasts, Videos, and Webinars

USB Mics for Podcasting and Webinars through computers:

34. Blue Snowball USB Mic (Desktop): <https://www.amazon.com/Blue-Snowball-Condenser-Microphone-Cardioid/dp/B014PYGTUQ/>
35. Blue Yeti Premium USB Mic (Desktop): <https://www.amazon.com/Blue-Yeti-USB-Microphone-Blackout/dp/B00N1YPXW2/>
36. Fifine USB Mic (Desktop): <https://www.amazon.com/FIFINE-Microphone-Recording-PS4-Headphone-K678/dp/B085WRN1VD>
37. Fifine USB Mic (Podcast arm/kit): <https://www.amazon.com/FIFINE-Microphone-Adjustable-Instruments-Streaming-T669/dp/B07Y1C6GDS/>
38. Maono USB Mic (Podcast arm/kit): <https://www.amazon.com/Condenser-Microphone-MAONO-Professional-Home-Studio/dp/B088FH47ZS/>

39. Rode Premium USB Mic (Needs arm and mount sold separately): <https://www.amazon.com/Rode-Podcaster-USB-Dynamic-Microphone/dp/B000JM46FY/>
40. Rode Premium USB Mic (Desktop): <https://www.amazon.com/Rode-NT-USB-Versatile-Studio-Quality-Microphone/dp/B00KQPGRRE/>
41. Jounivo Gooseneck USB Mic (Desktop): <https://www.amazon.com/Microphone-Condenser-Indicator-Gooseneck-Recording/dp/B07N2WRHMY/>

XLR Mics for Podcasting:

42. Rode Premium XLR Mic (Podcast arm/kit): <https://www.amazon.com/Rode-Anniversary-Cardioid-Condenser-Microphone/dp/B002QAUOKS/>
43. Maono XLR Mic (Podcast arm/kit): <https://www.amazon.com/Condenser-Microphone-MAONO-Professional-Home-Studio/dp/B088FH47ZS/>

Zoom Recorders:

44. Zoom H4N Recorder/Mic (necessary to use an XLR mic, or can use on its own): <https://www.amazon.com/Zoom-4-Channel-Recorder-Windbuster-Attenuator/dp/B01GOTUBLS/>
45. Zoom H1N Recorder/Mic (no XLR plugin, for use on its own): <https://www.amazon.com/Zoom-Windscreen-Headphones-Energizer-Batteries/dp/B08249B1RC/>

Auxiliary Mics for Videos & Podcasts through phones or DSLR cameras:

46. PowerDeWise Lavalier Lapel Auxiliary Mic (comes with extension cable): <https://www.amazon.com/Professional-Microphone-Omnidirectional-Recording-Conference/dp/B01AG56HYQ/>
47. Lavalier Lapel Mic Extension Cable: <https://www.amazon.com/Movo-PM10EC6-Microphone-Extension-Smartphones/dp/B00X85S7EA/>
48. Lavalier Lapel Mic Splitter (for two mics): <https://www.amazon.com/Splitter-Cable-Headphone-Y-Splitter-Microphone/dp/B01BNGAHCA/>
49. Comica Directional Auxiliary Mic: <https://www.amazon.com/Comica-CVM-VM10II-Directional-Microphone-Smartphone/dp/B074DWJ6C7/>
50. Comica Directional Auxiliary Mic Kit with Desktop Tripod and Phone Mount: <https://www.amazon.com/Comica-Smartphone-CVM-VM10-K2-Filmmaker-Microphone/dp/B078KNHTJF/>
51. Comica Directional Auxiliary Mic Kit with Grip Handle (screws into any tripod) and Phone Mount: <https://www.amazon.com/Smartphone-CVM-VM10-K4-Filmmaker-Shotgun-Microphone/dp/B07DFB12D1/>

Lighting for Videos and Webinars:

52. Selfie Ring Light: <https://www.amazon.com/Auxiwa-Selfie-Rechargeable-Battery-Camera/dp/B01MCZ2WY8/>
53. Small USB Ring Light: <https://www.amazon.com/Reading-Brightness-Protection-Flexible-Gooseneck/dp/B083NLX9NH/>
54. Small USB Ring Light with Phone Mount: <https://www.amazon.com/Ring-Light-Phone-UBeesize-Brightness/dp/B075ZLCSGP/>

55. Medium USB Ring Light with Phone Mount and Medium Tripod: <https://www.amazon.com/Summifit-Bluetooth-Lighting-Streaming-Photography/dp/B085N2BHW9/>
56. Large DC Ring Light with Phone Mount and Full-Size Tripod: <https://www.amazon.com/Neewer-Dimmable-Lighting-Portrait-Shooting/dp/B0784SSRZS/>
57. Standalone USB LED Lights with Tripods (2): <https://www.amazon.com/Neewer-Portable-Photography-Lighting-Adjustable/dp/B07YFY7H7J/>

Tripods:

58. Large DC Ring Light with Phone Mount and Full-Size Tripod: <https://www.amazon.com/Neewer-Dimmable-Lighting-Portrait-Shooting/dp/B0784SSRZS/>
59. Full-Size Tripod with Phone Mount and Swivel Head: <https://www.amazon.com/Extendable-Compatible-Digital-Cameras-Silvery/dp/B07JQC8C84/>
60. Wide-base Medium-height Tripod with Phone Mount and Swivel Head: <https://www.amazon.com/UBeesize-Adjustable-Smartphone-Bluetooth-Compatible/dp/B07QJVB3YF/>
61. Fugetek Medium-height Tripod / Selfie Stick: <https://www.amazon.com/Fugetek-Integrated-Professional-Lightweight-Bluetooth/dp/B075WQYN3B/>
62. Desktop Mini Tripod: <https://www.amazon.com/Manfrotto-PIXI-Tripod-Black-MTPIXI-B/dp/B00D76RNLS/>
63. Desktop Flexible Mini Tripod: <https://www.amazon.com/UBeesize-Phone-Tripod-Wireless-Compatible/dp/B07837W5NX/>

Webcams:

64. External Webcam with Ring Light: <https://www.amazon.com/Angetube-Streaming-Adjustable-Advanced-autofocus/dp/B07RXYG295/>
65. External Webcam with Ring Light and Tripod: <https://www.amazon.com/Streaming-PA552-StreamCam-Studio-Like-Microphones/dp/B08D7CVDD8/>
66. External Webcam with Microphone: <https://www.amazon.com/Microphone-FUVISION-Recording-Widescreen-Rotatable/dp/B0897HG7FC/>

Additional Accessories:

67. Phone Mount for Tripod (most tripods come with one): <https://www.amazon.com/AILUN-Rotatable-Adjustable-Compatible-Camcorder/dp/B072KNBV21/>
68. Alternative Style Phone Mount for Tripod (most tripods come with one): <https://www.amazon.com/Manfrotto-Universal-Smartphone-Version-MCLAMP/dp/B0169SORDW/>
69. Bluetooth Remote for Phone/Tripod (most tripods come with one): <https://www.amazon.com/CamKix-Wireless-Bluetooth-Shutter-Smartphones/dp/B00PJSIIES/>
70. Lavalier Lapel Mic Extension Cable: <https://www.amazon.com/Movo-PM10EC6-Microphone-Extension-Smartphones/dp/B00X85S7EA/>

71. Lavalier Lapel Mic Splitter (for two mics): <https://www.amazon.com/Splitter-Cable-Headphone-Y-Splitter-Microphone/dp/B01BNGAHCA/>
72. DJI Gimbal Stabilizer with Tripod: <https://www.amazon.com/DJI-OM-Handheld-Smartphone-Stabilizer/dp/B08CMVGVQY/>
73. DJI Pocket Gimbal Stabilizer with Built-in 4K Camera: <https://www.amazon.com/DJI-Stabilizer-Integrated-Attachable-Smartphone/dp/B07LHC91QC/>
74. Mevo Start Live Event Camera for Streaming and Recording with Tripod: <https://www.amazon.com/Mevo-Start-Live-Event-Camera/dp/B08BG6N3LL/>
75. Mevo Plus Live Event Camera for Streaming and Recording: <https://www.amazon.com/Mevo-Plus-Camera-Compatible-Android/dp/B075P5QHHL/>
76. Mevo Boost Power Pack Battery for use with Mevo Plus: <https://www.amazon.com/Mevo-Boost-Charging-camera-battery/dp/B01LWN4T3C/>

Software Resources:

77. Audacity (Free audio editing software): <https://www.audacityteam.org/>
78. GarageBand (Audio editing software for Mac): <https://www.apple.com/mac/garageband/>
79. iMovie (Video editing software for Mac): <https://www.apple.com/imovie/>
80. OpenShot (Free video editing software): <https://www.openshot.org/>

Additional Links:

81. Social/Digital Hub Website: <http://socialdigitalhub.com/>
82. Advisor Thought Leader Summit Website: <https://www.advisorthoughtleadersummit.com/>
83. Impact Communications Website: <http://impactcommunications.org/>
84. Marie Swift's Blog: <http://marieswift.com/>
85. Fiverr (Freelance services): <https://www.fiverr.com/>
86. Upwork (Freelance services): <https://www.upwork.com/>

American Idol

An interview with **John Wasik**
and Host **Marie Swift**

John and Marie talk about how to use
credibility marketing strategies, social media
and digital communications to your advantage

**Recorded for use by Morningstar for the #MICDigital
#MICUS event Sept. 2021 in the #SocialDigitalHub**

Video presentation: 29:13 minutes

Accessible in our archives here:

<https://vimeo.com/showcase/8782027/video/593107153>

AMERICAN IDOL: VIDEO TRANSCRIPT

Marie Swift: Well, hello everybody and welcome back to the Social/Digital Hub where we are having a great conversation today, John Wasik and I, and we've been talking about how John has used social media to promote his own work. He's a book author, a journalist, and the speaker of some renown. He writes for Forbes and the New York Times right now.

John and I go back a couple of years now. John, you first came to the Social/Digital Hub live at the morning star conference. I want to say four or five years ago, and we were talking about planners and advisors and how they can use social and digital communications to enhance their own brand. Do you remember those days?

John Wasik: I sure do, and it was a lot of fun because it was a chance for me to, I hadn't really dug really deeply into it at that point but was just getting into it and of course the past year has

really forced us to learn this in much greater detail. So, there's a lot more to know about it and the world has changed so much in the last 18 months or so, so there's a lot more to talk about.

BUILDING A PERSONA THROUGH SOCIAL MEDIA

Marie: Yeah, and we were already trending into social media, digital communications and using our devices and getting some mastery around all of that. You know, what's your voice? How do you be authentic, but maybe not too authentic and you know, some people have a different perspective about how much is too much or too little, but I mean, boring, it's almost to me like the death now.

John: It sure is. Projecting your personality out through social media and of course you're up against all of this Instagram and Tik Tok and it's all personality, right. For a professional it's a different persona and you have to be really careful about it.



John F. Wasik

John F. Wasik is the author of nineteen books, including *Lightning Strikes: Timeless Lessons in Creativity from the Life and Work of Nikola Tesla*. His columns, blogs, and articles have appeared in the *Wall Street Journal*, *New York Times*, *Reuters*, *Forbes*, and *Bloomberg News*. In 2018, Wasik was named an Illinois Road Scholar for the Illinois Humanities Council. His speaking engagements on technology, history, investing, and innovation reach global audiences. He lives in Grayslake, IL.

Marie: So, tell me a little bit about your persona. How have you built your credibility and your persona using social and digital? I know you've got a brand-new book out *Lincolnomics*, so maybe you could use that as an example.

John: Well, this has really forced me to understand what is the best use of social media? I do Twitter on a fairly regular basis. I have over 10,000 tweets. I don't know if that's something to be proud of, but I used to use it for different things, talking about general things, specific things, things I endorsed.

But it's not really good for your brand building. It's for some people who are doing it so consistently and so aggressively that you can't avoid it. For my purposes, I've been focusing on Facebook and

using that because there's a real good feedback element to it. I started the idea of, well, if I'm going to sell my book directly, and what I do is writing and speaking, how do I best reach my audience? One thing about Facebook is that it's great in telling you who your audience might be. Now it doesn't precisely tell you what those people are seeing or doing, but you can track them down through likes. You can track them down through the different sites that they are using, and you can see how they respond to your posts. So, that's sort of the most basic level of using that and then I stepped it up and said, well how do I really sell using Facebook boosts? This is where you pay for a specific targeted audience.

Facebook gives you a whole bunch of parameters, you know, college educated folks, folks in Kansas City. You can target it down to the city, specific demographic groups, and things that you really need to have to do some more precise marketing. I tried that, and I was digging deeper then after a while you're trying a few posts. You don't spend a lot of money, but you discover who's really hitting on your Facebook boost. To my surprise, at least for this book, I discovered that the vast majority of readers were men over 60. Hardly any women, probably college educated, but that was interesting to me because I didn't know that going in. Now Facebook has a lot more data, right.

To make it simple, they could say, look these are the people who are going to buy your product, we'll save you all this time. So, this is all backend information and it's very challenging because you have to cross reference because Facebook will tell you who's clicking on your post, who's clicking on your boost, but it won't tell you why and then if you're selling something, it won't tell you if they're actually buying something so that you have to cross reference. I use Amazon data. They will give you actual sales numbers for a specific period. It's not really precise because you don't know if they're clicking on your Kindle product, your actual hard cover, your audio book. They won't tell you that they'll just give you gross sales and it won't give you any other sales. It won't give you bookstore sales. It's just online stuff. I cross reference to see which boosts are really producing and then when you do the numbers, you can scale up a little bit, spend some more money to reach more people, and then your cost per click goes down.



So, that's what I've discovered just in the last year and I'm taking a little breather to evaluate some more data and to see which venues are working.

Marie: That's really interesting and so I bet history buffs would like to read *Lincolnomics* or people into current events and politics and maybe how the past informs the present. Are you able to ascertain any of that or do you have a hunch?

John: Yeah, I have some what I call sort of baseline data. I see in just the posts, and these are not the boosts these are just me posting about the book and I see who's responding to it. So, that gives me some ideas. There's like one history group that's pretty local that is very engaged into it. A lot of civil war groups, of course and some will bounce you. I mean they just don't want you promoting at all and every time you do this, you have to agree to the rules about any self-promotion.

Sometimes it's allowed sometimes is not. For those financial professionals that have a book out there and go to the Facebook book club. It's very tricky because most of the time you will not be able to promote your book and they'll bounce you off, but they have an occasional day during a month where they tell you, hey you can do self-promotion today. For me, it was today.

It was helpful, but they don't tell you in advance when that's going to be as far as I can tell, but they have 110,000 members. So, that's a good way to reach a lot of people and a lot of these other sites range from like a couple hundred to maybe 20,000 and you want to go for as many eyeballs as you can, but you don't always know who's going to respond.

FIND PEOPLE WHO CONNECT YOUR MESSAGE USING SOCIAL

Marie: Yeah, it's interesting because to me, social media at its finest is all about connection and so you're looking for people who are going to connect with your message and your book and your articles, whether it's for Forbes, the New York Times or whatever you're working on and I know you've got a ton of books and a lot of articles. I'm wondering if people find you and invite you to speak or to be on their shows like a podcast or a television show or radio show and also on the flip side of that, since you're always looking for sources, do you use social media to find people for your stories?

John: Well to answer your last question first, yes, I do. Some people just love to advertise. Say I'm writing about financial scams, and they've been scammed. That's a good way to find victims and that's usually pretty effective. Sometimes they don't respond, but my editor is always asking me, well who has been scammed by this? Can you find anybody? That's always a challenge. So, some social media is better than others. Twitter is not very good for me. I also do LinkedIn, it's primarily oriented towards people looking for jobs or advertising jobs so that doesn't really work too well for me, but if I want to find somebody, LinkedIn is better. If I want to identify a professional in a very specific area, LinkedIn is usually good for a bunch of leads. So, that is really helpful.

Marie: Also, you've got old friends like me, PR people, were happy to work with you anytime, John. So, there's my shameless plug.

Now I want to talk a little bit about new social media. Like we've got Tik Tok and Clubhouse, and I don't know if Clubhouse is even in the category of social media yet, but it's a gathering place and I think people are experimenting with that and then Instagram, relatively speaking seems a little bit old compared to Tik Tok and Clubhouse. Are you seeing that or hearing that or thinking about any of these newer digital communication tools?

John: You know, I see them and I'm certainly aware of them. However, I use my asset test, which is always my daughters who are much more in the social media, at least on that end than I am, and their basic response is always the same, Dad, don't even think about it.

So, Tik Tok is very short little videos and I don't know how I would use it. I mean, I always try to think about it as something new and novel as a way to reach more people, perhaps younger audience, but it skews very young, and it wouldn't work for my demographics.

For now, I'm staying away from it and unless somebody says, hey John, you really got to try Tik Tok and do it this way, or, you know Twitch or something like that. Somebody will actually have to show me how to do it without looking like a complete fool.

USING BOOKS TO BUILD CREDIBILITY

Marie: Well, let's talk about books as a credibility builder. I'm all about building credibility, authority, and really having a platform to share a message that lights you up as an individual and as a professional. I know your projects do that for you. They give you a platform and you draw business when you're doing things that you love and you're passionate about.

I'm wondering if you could just give some words of wisdom to our viewers and let's just say they're all independent financial advisors or those who can do their own marketing. What would you say to them about being in the press being seen as a source, being quoted, getting their content published, whether it's an article or a book?

John: I think it's really essential because it's not only one way of establishing credibility, but it's tangible. Say if you have a book, and I did work on a project as an editorial consultant with a lawyer who wanted to do a book on financial fraud and it was a very interesting project because one, he wanted to self-publish so was a lot more involved in that and two, he wanted it to be his calling card.

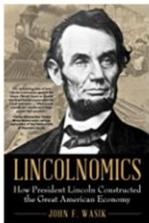
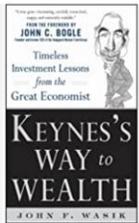
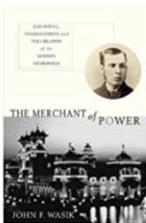
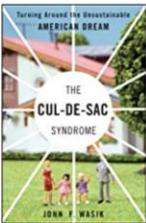
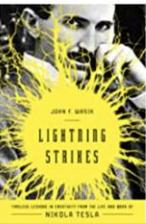
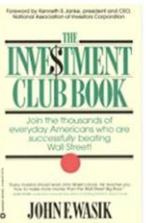
For a financial professional, that's really important because you could post a million times on social media and not really raise your profile, but if you have a book, then that is really going to make a difference. Here it is, it's something you can give somebody, you can advertise it, you can sell it, you can give it away to clients, you can use it as a promotion. I can't stress how important it is. Plus, it lays out your philosophy in a much longer format and the things that you provide to other people. So, I think it's really good for a lot of people to do and keep in mind these days, you don't have to write it.



John F. Wasik

[+ Follow](#)

Follow to get new release updates and improved recommendations

 <p>\$17.99 Kindle Edition</p>	 <p>\$14.34 Kindle Edition</p>	 <p>\$11.99 Kindle Edition</p>	 <p>\$15.00 Kindle Edition</p>	 <p>\$9.89 Kindle Edition</p>	 <p>\$9.99 Kindle Edition</p>
---	---	---	--	--	--

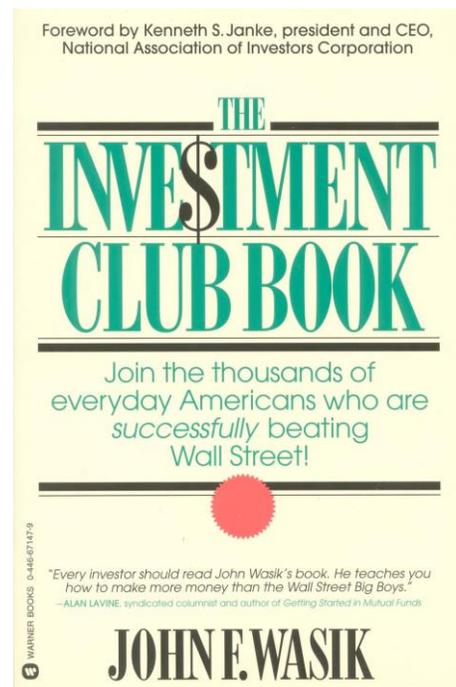
You can find writer who is a professional, we will do it for you, or ghost it for you or coauthor it for you. You can self-publish on several different online platforms so, that's not hard. If you want to do a really fancy hard cover, which I did for this client, you can do that too. It's a little bit more work and a lot more money, but if that's what you want to do to establish your brand, establish your practice, it's not a bad way to go.

Marie: Yeah. I've worked with authors over the years who have self-published and gotten publishers, the traditional kind, and it's a mixed blessing, no matter which way you go. I think you tend to go through a traditional publisher because you have a lot of clout and authority. Is that right?

John: I wish I had a lot of clout and authority, but I can tell you that traditional publishing is okay because as you know, the publisher will front the printing and distribution costs. However, unless you're Stephen King, they're not going to put a lot into marketing. I mean, almost nothing. So, then they'd have to find somebody like a Marie Swift who's going to put them out there and find the right market and that's worth doing, I mean, self-publishing is great, but then again, it's also good because you control the marketing a hundred percent. You can put as much money into it as you like and really focus on who you want to reach.

Whenever people ask me, well how do I publish a book? My second question, after I say, why, I asked them, well do you want to do self-publishing in which you control the process and pay for every penny of production and distribution and marketing or do you want to find a conventional publisher, which is tough. These days, business publishers are very constrained. COVID knocked them for a loop there. They're very stingy on marketing and it's difficult. I'm an established author and I had a publisher plainly telling me that my next book was not commercially viable so, I'm going out on my own again. Publishing has changed just like everything else. Unless you have a fantastic idea, you have a decent agent, you have somebody who's going to do really good promotion it's a lot of work.

Marie: You know, I remember a big name. I won't say the name, but this is a former executive at Schwab, and he had a hard time getting a publisher to accept his book and it was, I think, commercially viable. Ultimately a traditional publisher agreed with me and with him, but he used a book agent, a literary agent, to shop it around. I believe that the one he worked with didn't get paid until he got the deal so then their bread is buttered on the same side. I think you mentioned the word agent and that can be helpful if you really want to turn over those stones. When I approach agents and I say, here's the idea, here's the abstract, here's the book plan, oftentimes they'll just say, listen this isn't worth my time to even shop this because I don't think we're going to get a yes answer. Any comment about that?



John: That that's been the case for as long as I can remember, and I've been publishing books for 30 years. For them it's a business proposal and it has to be a really solid one. In these days, more so than ever, they're going to ask you, what is your platform? That doesn't mean you're posting on Twitter or Facebook. It means are you speaking in front of tens of thousands of people? Are you on TV? Do you have a radio show? That's what they mean as like, do you have a means of marketing your product.

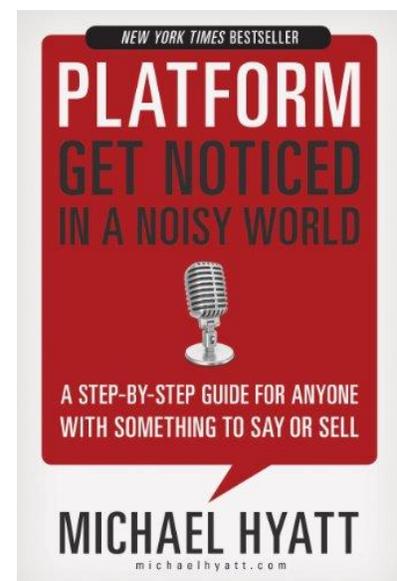
That's why radio talk show hosts do really well, because they have this built-in platform. That's why, if you can get onto an a nationally syndicated show, that's better than saying, I have 2000 Facebook friends. All that really adds into the mix. Keep in mind that if you're going to do a book and you want it to be more than just a calling card, you are going to have to look at it as a solid business proposal. You know, there's lots of good ideas. There's lots of good books, but what's your angle on selling it? How are you going to get it out to the people who are going to actually buy it?

IMPORTANCE OF HAVING A PLATFORM

Marie: Good advice and you mentioned what's your platform. I encourage anybody who wants to be anybody to get a platform started and there's a [great book that I recommend by Michael Hyatt](#) called *Platform*. He goes into why build a platform. What can it do for you as just a regular business professional?

We don't all have to be famous, but some of us can be quasi famous or really famous in our little pond. I'm thinking about podcasts and radio, which are both audio means and webinars and seminars, which is really trying to teach and present and then television, and then maybe like YouTube channels or some a video channel. I'm wondering about your thoughts on building a platform by doing some of that, just to get your name out there and to practice like thinking and articulating your thoughts.

John: Marie, you and I know, the world has changed so much in the last year that webinars, I think, have become much more powerful than they were prior to 2020. I've done quite a few and it's great because they'll stay out there. If you do it with somebody who's willing to put it on YouTube, that'll be out there for a long time and you can keep referring people to it and then you have this solid recording of what you're talking about.



I did one with a business school in New York and they teamed up with a museum. I had presented there in person many times in New York City and of course I couldn't during the COVID thing. I said, well let's do a webinar. They go great and they tied it into Fordham university. Fordham university got it up on CSPAN. CSPAN ran it multiple times in their schedules. I was sandwiched between Elizabeth Warren and Malcolm Gladwell which wasn't a bad place to be if they stayed

on. I have no idea how many people saw it, but I know it's out there. These are perennial things that are becoming much more powerful, much more effective. Podcasts are the same thing.

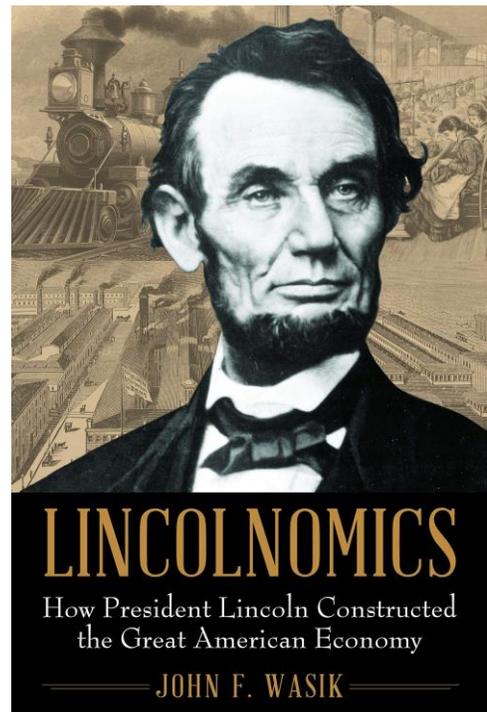
I've done quite a few podcasts and people can pick it up off of any number of platforms and listen to it any time. For me, it's more durable than radio because radio is, unless they're doing podcasting and we're willing to share you a link, it comes and goes. I always tell people, if you're going to do radio, do NPR. They're focused on books. They're focused on ideas. They read and they're more likely to listen to what you have to say. AM comes and goes in four minutes between news, weather, sports, traffic. It's tough to really latch on to somebody on an AM station. Again, podcasts are going to keep you there for longer time.

Somebody comes through the website of the radio stations, oh he's on a podcast. I'm going to pick that up. I can't listen to it now, but maybe I'll listen to it at the weekend. My whole theory is try all the above see what works for you. Obviously the bigger the audience for the podcast or the webinar, it's going to work out much better for you. Always promote yourself during these things like, hey my book's available at X, Y, and Z, or you can find out more about me at, and put in the link to your website, that'll stick so that's important to do.

LINCOLNOMICS

Marie: Speaking of links to books and your website, we're going to insert in this video, a link to the Amazon page where those who are listening, who want to find out more about *Lincolnomics* or buy the book, can buy it. Of course, it's available wherever books are sold online, right John. I'm wondering, we've got about five or six minutes left, I want to do two things in the time we've got. Number one, would you tell us about the book? What's the whole genesis behind it and then I want to wrap up with tips for working with the media. So, let's talk about your book and the genesis first.

John: Yes. So, it's the fourth book I've written on infrastructure, but it has a unique angle. I discovered this in my research and this is a really surprising story. Early in his career Abraham Lincoln was more into infrastructure than he was in the slavery, in terms of his core issue. When he started as an Illinois assembly man, he wanted to build a canal first and that was like his sole campaign plank. This is long before the emancipation proclamation and everything else that we know him for. He had a couple of cases where he defended railroads and he stressed the importance of the railroad as an amenity, as a public amenity.



That the whole infrastructure theme tied right into what we're looking at right now with Congress debating an infrastructure package. The surprising stories that not only was Lincoln into infrastructure, he signed the Transcontinental Railroad Act, the Homestead Act and National Banking Act and he created all these things at the height of the civil war. Most of us know him for the Gettysburg Address, his inaugural speeches of what he did through the civil war, and getting shot by John Wilkes Booth, but we don't know him for these things. So, that's why I did it. I love history, I live in Illinois, I've seen his image and his statues, they're everywhere here, as they are throughout the Midwest, but this was an untold story. I really love doing it. It was a labor of love I wrote during COVID and sort of wrote it backwards saying here's where we're at folks. We really need infrastructure. We really need to do this and here's a guy who did it way back at the height of the civil war. It was a lot of fun.

Your other question, how do you deal with media? I would target media that's going to work for you. If you have trade magazines that you need to get into focus real hard on that. Don't think that you have to do everything, because you can get on a million cable shows and it won't make a dime's worth of difference in promoting what you do because it's a very fleeting audience. National Public Radio is always a good medium for me. I know this is pretty much my demographic and these people will be interested in what I'm doing because they like books, they read books and that's really helpful because not everybody wants to read a book today. They'll say I'm just going to do Kindle or I'm just going to listen to a podcast and things have changed quite a bit. You want to really get focused and target your audience and find publications and media outlets that are going to do that.

I mean, some podcasts are really good at that, and others are probably wasting your time, but you have to get a very select list before you go into any promotion as you know Marie. Say hey I absolutely got to do this. For me I absolutely have to do my local NPR outlet. They've booked me before, they know me. It's not a hard booking and to get on there as is always my first step.

WORDS OF WISDOM FOR BECOMING A CREDIBLE EXPERT

Marie: You and I could spend another half hour or more talking about how to endear yourself to a journalist if you're a pitching and what to do that would alienate a journalist. In fact, you and I did some of that. Remember in 2018 where we were at the University of Chicago at the Gleacher Center downtown, and it was called the Advisor Thought Leader Summit and you were so kind to come and share what advisors should and shouldn't do when approaching a journalist, like you. Maybe give us a 30 second soundbite as we wrap up today. Any final words of wisdom about that or anything about becoming a credible expert.

John: Always have a unique pitch. We journalists get a lot of pitches that are exactly the same. How do you prepare for retirement? How do you avoid running out of money? All the usual stuff that people face every day, but for a journalist it's like been there, done that. I'm always looking for new ideas. In an age of media saturation, you have to be conscious of the fact that we don't know everything, we're not the experts. You have to give us something we haven't seen and something we're going to say, oh I've never heard of that before. Have people who can talk about

that. Always present the idea that you have people who have gone through it, can relate to the experience and can be photographed.

That's always my standard reply, okay you've had these folks do this in retirement. Can they talk to me? Will they be photographed? So that's always a big concern and a standard thing that I was asked.

Marie: Fantastic. Well, I wish we had more time, but John thank you so much for being with us today. I can't wait to see you in person, hopefully in the coming year when the COVID dust settles, but good luck with your book and everything you're working on for Forbes and New York Times as well.

John: Thank you so much, Marie. It's always a pleasure and I can't wait to get back to the situation where we can actually work conferences together and talk and actually meet with people, I hope it comes soon and I hope this thing ends soon so we can do that. My best to everybody and hope everybody's doing well.



Social / Digital Hub



Marie Swift, Chief Executive
Impact Communications, Inc.

John Wasik
Author | Speaker | Journalist

Learn more about *Lincolnomics*:

https://www.amazon.com/Lincolnomics-President-Lincoln-Constructed-American/dp/1635766931/ref=sr_1_1?dchild=1&keywords=lincolnomics&qid=1630681165&sr=8-1

Other books by John Wasik:

https://www.amazon.com/John-F-Wasik/e/B000APZQSO/ref=dp_byline_cont_pop_book_1

###

Digital Realities

Jonny Swift speaks with
Sam Brownell of Stratus Wealth Advisors,
Ruth VanBuskirk of AP Wealth Management and
Steve Conroy of Braun-Bostich & Associates
to discuss what's working today when it comes
to advisor marketing and digital communications

**Recorded for use by Morningstar for the #MICDigital
#MICUS event Sept. 2021 in the #SocialDigitalHub**

Video presentation: 29:59 minutes

<https://vimeo.com/showcase/8782027/video/596975779>

DIGITAL REALITIES: VIDEO TRANSCRIPT

Jonny Swift: Welcome back to the Social/Digital Hub at the virtual Morningstar Investment Conference. We're here for another session in the virtual Social/Digital Hub. Today we have a panel of experts discussing marketing and communication strategies and tools that are working for advisors today. I'm Jonny Swift of Impact Communications.

With me today is Sam Brownell, Founder and CEO of Stratus Wealth Advisors in Kensington, Maryland, Ruth VanBuskirk Marketing and Social Media Manager at AP Wealth Management in Augusta, Georgia and Steve Conroy, Director of Marketing and Business Development at Braun-Bostich & Associates in Canonsburg, Pennsylvania. Thank you all so much for joining me.

So first off, I want to talk about how each of you at your respective firms have had to transition communicating with clients digitally and virtually during the pandemic. Obviously for most

advisory firms, advisors have had to stop meeting with clients in person and start meeting virtually whether via phone call or video chatting services like Zoom or GoTo Meeting or Google Meets.

Sam, let me start with you. How have you had to change how you've directly communicated with clients throughout the pandemic, including how you meet with them and how you serve them?

COMMUNICATING WITH CLIENTS DURING THE PANDEMIC

Sam Brownell: Sure. We do a lot of work with independent business owners and one of the most fun things pre-pandemic was meeting with people where they do business and getting to see and walk around their space.

We do a lot of work with folks in the lumber and building materials industry. So, the pandemic has changed things in two ways for existing clients, it's actually made it more efficient because I'm not flying around the country as much anymore to go visit folks in person, but for those new or proposed clients that we're trying to bring on board, that's been a little bit more challenging because it is fun to meet these folks in person. You get a really good idea of what their business is like when you could walk around and ask them questions and meet the guys who were in the yard and driving the forklifts and all of that. For us, I would say to sum it up, it's changed in two ways. Depends on where the client is, existing clients it's made it more efficient to go digital with Zoom and phone calls. New clients, that's been a bit more of a challenge just because it's harder to get to know them.



Sam Brownell, CVA, CFA, MBA · 1st
Financial Advisor & Founder of Stratus Wealth Advisors

Jonny: Ruth, the same question, how have advisors at AP Wealth directly communicated and met with clients throughout the pandemic? Have they resumed in person meetings?

Ruth VanBuskirk: So as of now they have resumed a few in-person meetings for clients who feel comfortable. Our firm definitely likes to personalize their service for each client. We work with multiple generations in the same family, small business owners, professionals in our community. I'm sure everyone has noticed everyone has a slightly different comfort level throughout this whole season.

So that's definitely been a challenge that we have, I believe, met and done pretty well with. Our advisors were very quick to switch over to offering Zoom and phone call only client meetings depending on the client's preference and honestly, their technological ability. Some of our clients are more tech savvy than others and so for some that aren't so tech savvy a phone call was so much less stressful for them and still allowed our advisors to stay in touch with them. Our client meetings are typically prescheduled throughout the year. Depending on the client it might be annual semi-annual or even quarterly. So as that meeting comes up in the calendar, we just touched base with the client. Give them a quick phone call and say, how would you like to set up your meeting with your advisor this time? And we send them the information for that.



Ruth VanBuskirk

We also were able to start texting with clients. During the pandemic, our system integrated our phone with our CRM and so we can now text our clients directly from our office line and have it tie back in and be tracked for compliance into our CRM. That's been really helpful for sending just quick reminders for meetings and also even just staying in touch with some of our younger clients, since we do work with the grandparents, parents, and maybe there's three different generations. So, with some of the younger clients, the texting is really helpful. We've also pivoted our monthly briefings to offer those virtually. Our briefings are now a webinar offered to clients and they talk about various topics related to financial planning and investment management.

During the height of the pandemic, when the volatility in the market was pretty intense, we offered them weekly and all the topics were just market updates, what's going on. These were really helpful and a big win for our clients because we had quite a few who were really nervous. It also helped our advisors field less phone calls of a panicked client about what was going on. We preemptively answered questions and offered that service for our clients and our clients were actually invited to send the invitation to their friends or someone else who might be interested so we had a few non-clients attend as well. They could ask their questions, live, and get responses from our advisors. It was very conversational and interactive.

Right now, we're back to doing those monthly. They are still online. We may possibly go back to in-person at some point, but right now they're doing pretty well online. I think we're going to keep that for a little while still.

Jonny: That's great. I have to say that a texting capability is a game changer, so that's really cool.

Steve, what about advisors at Braun-Bostich? How have they had to change how they've directly communicated with clients?

USING NEW TECH & PLATFORMS TO COMMUNICATE DIGITALLY

Steve Conroy: Yeah, I mean along the same lines. There was before the pandemic Zooming, and then there's an after the pandemic Zooming. For us, we had a large quantity of clients that were very comfortable with Zoom meetings, but once that pandemic hit there was a ton more that inched their way into it.

Folks that were not as comfortable we had done a lot of trial runs from a techie standpoint, just to make sure connections were correct and that they feel comfortable. Some of them were older clients so wanting them to feel as comfortable as possible with the technology. To Ruth's point, the texting piece, we use a product called MyRepChat, and that was incredibly helpful.

It was a relatively new product for us pre-pandemic. We also use another platform technology called Levitate. That's more of a personal one-on-one marketing platform. That's incredibly good. I don't know if you folks have ever heard of it, but we use that more with clients than we do with prospects and what they don't see in those sorts of communications is they don't see a mass blast that's going to 15 gazillion people. It is really a one-on-one and more personal touch type of a platform. We used an awful lot of that and coupling the Zoom with the new technologies, more clients getting more acclimated to those technologies really was a benefit to us in the long run because now most of them are very comfortable with those technologies.

It's going to be difficult to get a lot of our older clients off Zoom to even get them back into the office. So, it's really worked out well for us that piece, and then those technologies are very inexpensive and just have performed exceedingly well for us and our clients.

Jonny: That's great that you're able to coach some clients in how to use that software. You know, with the Delta variant in full force right now, I think virtual meetings are here to stay for a while, but it's always nice when advisors are able to offer the option and have the capability to do in person or virtual, especially when there's no value loss in having them as virtual meetings.

In addition to direct communications and meetings with clients what other strategies have been effective throughout the pandemic for communicating and keeping in touch? Not only clients, but also prospects and other audience members. Ruth, you touched on the briefing videos. I know that's been really effective for you. What else has been effective?



Phone: 724.942.2639

sconroy@braun-bostich.com

USING SOCIAL MEDIA TO INCREASE REACH DURING THE PANDEMIC

Ruth: Yeah. We have a couple different strategies that we've used throughout the pandemic. Most of them built on what we were doing in a smaller manner before the pandemic, but digital marketing definitely increased for us during the pandemic. Like I mentioned, we're very personal and have relationships with multiple generations.

So before the pandemic, We did a lot of in-person things for marketing events and that sort and so we really had to pivot during the pandemic. One of the first things that we did was really enhance our social media. We have a presence on all the big ones Facebook, LinkedIn, Twitter, and Instagram. We utilize both an organic and a paid strategy on these platforms. We've seen that be very successful for us. Honestly, it's very affordable to advertise on Facebook and see a pretty significant bump in our reach. LinkedIn's a little bit more expensive per person that you're reaching, but some people say that you get a better quality lead from LinkedIn than Facebook. I think we're still on the fence about whether or not we see that same thing for us, but we definitely advertise on both and recommend it for anyone who asks us.



In fact, in one reporting period, this past year we saw 600% increase in Facebook reach. That's definitely significant for us. We don't see that every reporting period, but that was pretty exciting, for us. We also use email communications. We send out periodic email communications campaigns to our database. These typically ended up being about monthly, sometimes more frequent, sometimes less frequent, depending on the content that our team writes.

Our advisors all take turns writing blogs, so that original content we share in our email newsletter. We also share the recording of the briefing. We have a video recording of that briefing event and we share that after uploading it, of course, to YouTube so we can embed it and any firm news and updates insights that we've seen, so that goes in our email newsletter. The cool thing about email for us is because we personalize our campaigns people see that personalization and they will occasionally respond to the advisor who wrote the article for instance, and ask follow-up questions and it starts that dialogue with them. That's been pretty neat for our advisors.

This past summer we decided to do a little bit more out in the community. Things were a little bit calmer pandemic wise and so we took that opportunity and we decided to sponsor one of our local PGA golfers. If you're familiar with the Augusta, you're probably familiar with the Masters and you can probably guess that golf is pretty big here. We have sponsored Scott Parel and it's been just really neat to support our fellow Augustan and the champions tour and our advisors will then participate in charity golf tournaments and things like that to really get out in the community, stay in touch, build relationships and at least in this season, the nice bonus for those kinds of outings is they're outside.

We also, this past season in the spring, we pivoted one of our charitable endeavors. We host and sponsor an annual award called the George and Dorothy Walton award. This award is presented to an Augusta area couple who exemplified the legacy and values of George and Dorothy Walton.

George Walton was one of our founding fathers and helped write our important documents and things like that and so we try to honor a couple whose lifestyle exemplifies service, selflessness, hospitality, courage, and devotion. Typically, we have an event after the recipients are chosen and honor that couple with speakers, a video and guests, obviously that did not happen this year. We did that virtually and it worked pretty well actually. We did end up inviting the couple to our office for very intimate, small gathering. Presented their award to them and also had a viewing of the video we commissioned to honor them so community members could speak and talk about their impact in the community.

They got to see that and that's always very meaningful, sometimes tears are involved, the good kind. Later we were able to share all of that content on our social media and in our newsletter and on our website. Which in the past, because it's been in person, the only thing we could share before was the video and photos of the event. We were able to actually share them receiving it and more people were able to participate and honor the couple because it was online. That was really cool pivot. Then one last thing, we're looking ahead the pandemic is hopefully wrapping up, so we'll see what this Delta variant, but once things are safe to do so again, in person in groups, we are remodeling our upstairs to become the "Treehouse" at AP Wealth. We are going to use this space to really connect with our clients, their families, community members, prospects, and build relationships and trust. It's called the Treehouse partially because it's upstairs in our office. There's a balcony overlooking the forest and we're going to make the decor fun and treehouse-esque

Anyways we're excited because the star of the show is a golf simulator that we've installed upstairs. So not only do we get to build relationships, but we also get to have fun with our clients and prospects at the same time. That's going to be really great once that's finished and once a meeting in person is a good idea.

Jonny: That's very cool. Those are some really great strategies for staying involved in the community and staying in front of your target audience. Thank you for sharing all that. Steve, what about you? What digital strategies have been effective for Braun-Bostich for keeping in touch digitally with clients, prospects, and other audience members and your community?

CUSTOMIZING PAID CONTENT TO USE WITHIN YOUR COMMUNITY

Steve: I'll dovetail to my past discussion about the technologies we put in place for us. For a small firm like us we've embarked on a bunch of different levels. Again, Levitate has been huge for us in this vein. So, anything and everything that you could think you would want to send individually to a client on a one-on-one personal basis we use that platform for. It comes with a bunch of different templates, reminder templates, holiday templates, the whole nine yards, you can tweak them, make them your own. We used that during the pandemic in a very big way.

Blogging obviously, we do blog through our website. Our website is hosted by TwentyOverTen if you folks are familiar with them. They've got a library of content that is content that can be manipulated, edited, in any way, shape or form that we want to. The advisors go in and they massage that content to their own liking, they personalize it, so we do an awful lot with that. There's probably give or take, I'm going to say six to seven hundred pieces in there that are constantly changing in that library. Again, anything and everything that you want to change in there is your own, so it ends up being original content. It ends up being something that the advisors can use as authority pieces in the community and the markets that we deal with so that's also used very heavily.

We put together during the pandemic, which was a pretty big hit across the board, what we refer to as a COVID 19 tracker. It was basically a one sheet data sheet, and it came out every single week and it just gave statistics on what was going on across the country with the tracker. We got a ton of take on that one, it was a good piece. Intermittent things during the pandemic that related to the pandemic, but it also had a personal slant potentially at them, some things were even dovetailed into advanced planning needs and how COVID worked its way either negatively or positively into that scenario, so we've done a lot of that.

[BBA BLOG](#) [EBOOK](#) [INTENTIONAL WEALTH PODCAST](#) [IN THE NEWS](#) [MEDIA INQUIRIES & PRESS KITS](#)

Transforming your wealth one informative topic at a time...



Reasons You May NOT Want To Put Your Child's Name On Your Deed



8 Legal Documents Parents and College Students Should Sign

We also use Snappy Kraken as an email platform. I don't know if you folks use them, but we started with them I'm going to say sometime in March, and I've probably got on average about 30 some campaigns running at any given moment. I take a lot of those campaigns and I repurpose those on the website in the form of widgets that take website visitors right to the campaigns on Snappy Kraken. We've gotten a lot of good buzz from clients and prospects on that. They also have social only campaigns, I launched probably three or four of those in the past six months. Those resonate very well in particular with Twitter for some reason, I'm not too sure why, but those campaigns the newsletters in there are very specific to clients and there are single topic pieces that come out every two weeks that are just timely pieces that also resonated very well with clients and prospects.

We deal with, from a vertical market standpoint, we deal with about six different segments, niche prospects. There's a ton of content between what we get from the TwentyOverTen folks in the content library and there's just an incredible worth in the Snappy Kraken platform as well in the content that they produce and allow you to tweak and get out there on your own, under your own cover. So, it's been very good for us.

The last thing that we did, the most recent thing we did is we brought in a company called PHMG, which basically is a company that produces a brand sound for your business. You take that brand sound. You slice up the actual music piece of that. Use it in intros and outros for podcasts and things of that sort but also, it's connected to the telephone system so there's a professional voice grade quality answering the phone. If you're on hold there's messaging, you can change eight times a year on there. That also, in the last two months, has become something that a lot of clients who call in frequently have noticed and they've liked it.

You know, there's clients that you've, I'm sure you guys know this, that you've had for years that sometimes scratch their head and think, does my advisor actually provide that sort of service? Well, those sorts of things that we hear, we stick in the plug and play messaging and we change that out every so often so it's a really good way to advertise, not to just net new prospects, but also your clients on things that they've been thinking about but hadn't engaged with an advisor on yet. So those are some of the things that we're doing.

Jonny: That's great. Just to follow up on your comments on the TwentyOverTen content and Snappy Kraken as well, both of those are great tools for advisors that maybe have a hard time creating truly custom content on their own. They provide a lot of great can pieces that, like Steve said, can be customized and massaged to your liking. Specifically, Snappy Kraken provides a lot of really good content that's compliance friendly. It's out of the box. It stands out a little bit, a little bit different from a lot of other content out there. So, for those of you who have a hard time creating content on your own those are great ways to supplement and have canned content that can be customized.

Thank you, Steve, for that. And Sam next to you, what do you think has been the most effective way for Stratus to keep in touch with and stay in front of your target audience digitally?

BUILDING TRUST AND CREDIBILITY THROUGH VIDEO

Sam: I think Steve and Ruth touched on some really good ones, so I won't go over those again. I think for us, some of the big things were getting on video like we are right now. I think some of the things that really worked with our clients were doing some really short professionally shot and edited videos that talked about the different services we provide, right? Valuation of private businesses, succession planning, integration with your personal and your business plan, how to maximize the value of your business, all of these different things in short, easy to digest segments, because when you're dealing with, especially a business owner market, they don't have a lot of time. They're not going to sit down and read a hundred-page book about, oh geez how do I sell my business to the next generation?

But if you can give them a couple ideas that really helps and it's a trust, right? As we talked about earlier, it's hard when we can't reach your hand out and shake somebody else's hand. Building that trust we found through video was a really good way.

Video Library



[Sam Brownell Interviewed by Trevor Crowley: How the Current Economy is Affecting the Real Estate Market](#)



[Video Interview with Sam Brownell: Top Tips for Independent Business Owners](#)

Other ways we did is we tend to do a lot of talking at a large industry conferences. Whether it's a national association or regional or local association, we come in and we'll do talks and we'll try to get people involved. Webinars made that much more achievable and certainly it's a cheaper way to do it than flying around the country. It also allows for recordings which then you can put on your website and push out through social media or send through a new email newsletter. A lot of different ways to get content to people, especially if they missed it. For some of the industries that we work in that were super, super busy like hardware, lumber dealers and folks like this. People were working night and day to try to try to figure out what to do and so for them to be able to go back and watch something on their own time, I found that to be very useful.

Then as we've talked about a little bit, sponsorships, right. We're associate members of a lot of these associations and the bigger purchasing groups. We do a lot of work through them. So being

able to sponsor different conferences and show up and provide a little bit of content especially digitally, again, really easy to do put together some PDFs, put them up there on your digital sponsorship page and it tends to get a lot of engagement because a lot of times with the platforms we were working with people could go back 60, 90 days following a conference and still be able to access the recordings and the materials. So really good way to get to a busy segment of the market.

Jonny: That's great Sam. Those videos on your website are just a great way to build your credibility and expertise, but also a great way for prospects to really get a feel, not only for the type of advisor you are, but also the type of person you are.

Those webinars you do often are a great way to stay in front of your target audience and continue to grow your audience and your email list, which you continue to drip market to with all of your other great content. So, kudos to you for continuing to fill and work that marketing funnel.

All right. Well, unfortunately we're already running out of time, so we'll start wrapping up, but before we go are there any final tips or tidbits you'd like to share with our audience today when it comes to communicating effectively with your audience in today's digital world? What's your biggest takeaway? Ruth, let's start with you, followed by Steve and Sam.

TIPS FOR COMMUNICATING EFFECTIVELY IN A DIGITAL WORLD

Ruth: I think for us, the biggest thing to remember is to stay consistent and relevant. Don't wing it, create a strategy, and stick to it. Revisit it, look at the reporting and the analytics tweak your strategy, but commit, actually decide that you're going to do it and then follow through even if it takes time to see results. So, we've had a social media presence since our firm started over a decade ago, but we haven't really seen any traction until we set a strategy, committed and prioritized it, and actually implemented it. That's only happened in the last couple of years.

When it comes to actually getting content. If you're going to go the route of Snappy Kraken that's great, but if you're going to write it yourself try to divide and conquer that. Divvy it down amongst the different advisors if you've got a team and don't put that all on one person. If you are one person and you're not a writer, then probably finding something like Snappy Kraken is a good idea just so you can have that consistency. Then paid advertising on social media is an excellent idea. It's affordable. It makes a huge difference.

If you have a piece of content that you've created or that you have through a system that you've purchased use it in multiple ways. Your blog article can be posted multiple places. You might even use it to create a webinar which you record, and then you can send that out. There's just a lot of ways to tweak something so if it's a good topic, don't just send out a blog article and be done with it use it in multiple ways. As far as just connecting with people, different people prefer different methods so figuring out what your clients and prospects prefer and then communicate in that way.

It might be email, it might be video, articles, educational content like that, and it might even be just a simple text message to check in with them and see how they're doing. So just remember to be nimble, agile and make changes when you see something isn't working right.

Steve: Ruth stole all my goodies.

No, seriously. I think honestly that healthy mix of content is incredibly important. The consistency piece, again, incredibly important. I think to echo one of her last comments I think repurpose 24/7, so anything that gets created, how else can you use this thing? It takes an awful lot of time to come up with content if you're doing it on your own. Re-purposing is a huge advantage.

Sam: Both Ruth and Steve had some great things to say. I would echo something that Ruth said, which is be patient. There are more people than ever who are out there trying to find out financial information through digital channels. Be patient, have a strategy and go after it.

Along with that and something that this whole pandemic has really helped us with is focus. Know who your audience is, know who your niche is, and then go after them, because then you can create these lookalike campaigns. You can create something like the lead magnet that we have, the business succession planning kit, that really targets who you're looking for because then you can really create a whole strategy around that. So definitely really focus on who you want to go after, because there are a lot of voices out there, but you may have a voice that is really knowledgeable in one area. Don't just put that aside, keep hammering away.

Jonny: All right, great advice. Thank you so much for your insights today.



Learn more about:

- Sam Brownell and Stratus Wealth: <https://www.StratusWealthAdvisors.com/>
- Ruth VanBuskirk and AP Wealth Management: <https://www.APWealth.com/>
- Steve Conroy and Braun-Bostich & Associates: <https://www.Braun-Bostich.com/>

Links to platforms mentioned:

- MyRepChat: <https://www.IonLake.com/MyRepChat/>
- Levitate: <https://www.Levitate.ai/>
- TwentyOverTen: <https://www.TwentyOverTen.com/>
- Snappy Kraken: <https://www.SnappyKraken.com/>
- PHMG: <https://www.PHMG.com/en-US/>

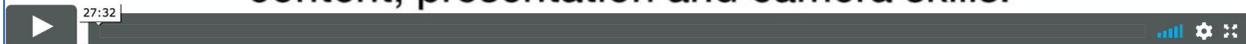
###

Candid Camera

A seasoned presenter,
Marie Swift of **Impact Communications** shares
her secrets for looking good on camera.

Marie even shares a few cringe-worthy moments and
how she worked through them.

Yes, you really can win hearts and minds with the right
content, presentation and camera skills.



**Recorded for use by Morningstar for the #MICDigital
#MICUS event September 2021 in the #SocialDigitalHub**

Video presentation: 27:32 minutes

Accessible in our archives here:

<https://vimeo.com/showcase/8782027/video/456810817>

CANDID CAMERA: VIDEO TRANSCRIPT

Marie Swift: Hello everybody and welcome to the virtual Social Digital Hub. My name is Marie Swift, and I'm going to be talking to you today about camera skills. How to be on camera. How to win hearts and minds through video and through webinars, or any kind of medium where you're talking to people where they're not necessarily in the room, or maybe it's a hybrid where they're in the room or also watching virtually.

So, I'm here with my crew in Leawood, Kansas. Today's date is August 14th, but you're going to be watching this later is a part of the Morningstar, the big conference that they're doing both virtual and in person this year in Chicago as is the norm at the McCormick Center.

For those attending virtually, we're trying to replicate as much as we can. What the experience might've been like had you'd come into our big Social/Digital Hub in the middle of the exhibit hall

in the McCormick Center. So, this is the best we can do right here in Leawood, Kansas. I have some of my “roadies” here with me. And also, in this virtual presentation series, you're going to hear from these guys, these techno guys, about all the gadget and gizmos that they use to help me communicate better through social digital and video means.

CHARACTERISTICS OF GOOD COMMUNICATORS

So, let's get started. So, if you think about the best communicators that you know there are probably a couple of qualities that come to mind. Just take a minute and think about the best communicators you know. What is it about those people that draws you? Just grab a piece of paper and write down a couple of things about communication skills and who you admire.



I'll bet that every single one of you wrote down something around this idea of presence, executive presence, gravitas, authenticity, humanity, friendliness, or something about the person who they're being more than what they're saying, that draws you to them. So, we were going to talk about executive presence, not just camera skills, not just presentation skills, but what is that thing, that elusive thing called executive presence.

THE THREE L's

When you get right down to it, executive presence really hinges on the approach, the appearance, the behavior, and just that whole way of being. And I pull it down to what I call the three L's. The first L is look. The second L is language. The third L is leadership. Let's talk a little bit more about

each of those qualities, the three L's.

So, the way I look, the way you look, it helps the person with their eyes to validate that your credible resource for them. The language, what you're saying, validates with the person's brain, that you're an authority that you can actually be trusted as a competent professional or a resource for them.

And then leadership. Those are the things that you do that manifest around your character, your culture, who you are as a professional, or just as a good citizen in your community. It helps people understand it, that gut level that they like you, they trust you, that they share same values with you or similar values.

So, remember the three L's whenever you're going to present, whether it's a one on one client meeting or to a big group or an audience, because presence sells. It's that eye contact, that body language, that facial expression, that authenticity, that's going to draw people to you no matter what the scenario is, no matter what the situation is.

The 3-Ls

=

Authority

- Look
- Language
- Leadership

- Eye Validation
- Brain Validation
- Gut Validation



HOW TO BE YOUR BEST SELF

So, if you think about it, you want to be your best self. You don't want to be a phony, but you want to ramp up just a little bit of acting when you're presenting or when you're trying to convict or show your conviction and convinced people of your position. And perhaps Ronald Reagan said it best that how can a President not be an actor? How can any one of us in today's world not be a

little bit of an actor to draw people in and to be our very best self in public.

So when I come out to speak, whether it's through a video like this, or when I'm in person in front of a room, or even through like a Zoom chat where I'm getting to know people and maybe trying to convince them of my qualifications, of my credentials, of my authority for them. I think of myself almost like an ice skater coming out onto the ring because that's who I am, that's more authentic to me. I want to be graceful, maybe like an ice skater or a ballerina. And I've seen this play out where I've been on big stages, talking to big groups and keeping that mental idea of I'm an ice skater. I'm graceful under pressure has really helped me over the years.

I remember one time where I was speaking to a big group at the Transamerica Conference, and I had walked the stage. I knew the gauntlet. I knew who I was coming after. I was well prepared, well-rehearsed, but someone had moved one of the chairs into my path, my rehearsed path, and it was a little dark. I actually tripped on that chair. And I'm sure that on the big screens, on both sides of me, where I like larger than life, that they can see the look of oh my gosh, what just happened? Yeah. You know, I was a little bit mortified inside. But I knew that it wasn't about me, that it was about the audience, the people in that room who were looking at me with the spotlight, with the big screens on both sides. And the show had to go on. Fortunately, I didn't fall down, I just tripped, and I didn't want that to happen, but I recovered. And then there were a couple of other things that happened where my remote control wouldn't work and I had to wave it and say, "Hey, AV guys in the back, can I have control role of my flipper?"



So little things like that, you know, you learn, and you live, you get over it and you realize it's not about you.

It's about your mission, your message, and what you're committed to doing for that group. And later people did say to me, "Marie, I want to be like you when I grow up. How did you maintain your cool?" This isn't about me telling you how great I am, but I hope that you take some inspiration. If I can work through this, as you can work through this and keep doing it, and you're going to get more comfortable and better and better.

BODY AND MIND TIED TOGETHER

So, let's dive in with a couple of more specific tips around body language and how you use your hands, your face, and the whole presence who you are bringing me to the conversations. So, in body language, let's talk about the signals that you're transmitting. When you have an open body, you feel more grounded, you have more air, more diaphragm. You have more authority. People feel more comfortable when you are standing straight and have good posture. You've got an open body.

In fact, one of the poses that you can use when you're feeling a little nervous if, for instance, you're doing a big presentation, or you just don't like to be on camera, is this: Place that put your hands on your hips, and this is called the Superman pose or the Wonder Woman pose and just kind of breathe and like get into it and really open up that diaphragm, get your posture up, imagine a string going up into the ceiling and holding you up straight, and then just kind of relax into it and then breathe.

Dr. Weil has a famous breathing methodology that will help you unfrey your nerves. If you're nervous about doing anything, anything at all, breathing really helps you with that anxiety. So, I would Google Dr. Weil and learn about him method for breathing in holding that breath and then exhaling while you're thinking of something pleasant and maybe repeating something that's self-affirming for you.

I have my own mantra. I'm not going to share it with you today, but perhaps

4-7-8 BREATHING EXERCISE
Try this simple technique whenever you need to calm down.

4 SECONDS
INHALE
Sit up straight in a comfortable position. Place the tip of your tongue on the ridge of your gums, just under your front teeth. Expand your diaphragm and slowly inhale through your nose for a count of four seconds.

7 SECONDS
HOLD YOUR BREATH
Hold your breath for another count of seven.

8 SECONDS
EXHALE
Open your mouth slightly and exhale for eight counts, drawing your diaphragm in. Repeat the cycle three more times.

when we are together in a personal event or a live event in the future, I'll tell you what I say to myself before I go out on stage in order to calm my nerves.

So, what you're seeing here, we should be putting a slide up here any minute around body language. You're going to see on the top row. Those are the high-power body language positions. On the bottom row are the diminishing body language positions. So, try to have that little bit more open, big body. And not a contracted small body and you're going to feel better about yourself and other people are going to feel better about you too.

So, you know, think about what our mothers probably taught all of us is stand up straight, look, people in the eye, be friendly, be interested, lean in. Your mother was right. And now science proves that your mother was right.



So, there was some famous research that was done in a great Ted Talk, I believe the professor was Dr. Amy Cuddy. She did this research with the Wharton Knowledge Center. So, it's about this idea of your body language actually changes your physiology. So that Wonder Woman pose, that diaphragm, that being that grounding actually changes who you are for yourself and changes who you are for other people.

So, let's talk about another rapport building technique that works. It's called mirror rate. So, if you think about people who are in great sync together, it might be a couple, it might be politicians. It

might be business professionals. If you watch them closely over time and you'll see this slide come up here so you can actually get some visuals, they actually start to naturally mirror each other in their body language. How they're sitting, how they're being, what their faces look like. Now, this is not to say that you want to mimic people. You don't want to mimic people. That's a cheap imitation of what settled mirroring is. It needs to be authentic. People that want to feel like you're manipulating them but be in tune with mirroring. If someone is leaning in, lean in a little bit. If somebody is leaning back, maybe you can lean back. It's about matching what their comfort level is and being more in sync and building rapport. And this works great in all sorts of situations.



The screenshot shows the top portion of the Wharton Knowledge@Wharton website. At the top left is the Wharton University of Pennsylvania logo. To its right is the text 'The K@W Network:' followed by language options: English, 简体中文, 繁體中文, Español, and Português. Further right are 'Log In' and 'Register' links, and social media icons for Facebook, Twitter, LinkedIn, and Instagram. Below this is a dark blue navigation bar with the text 'KNOWLEDGE @WHARTON' on the left and a search bar on the right. Underneath the navigation bar are several menu items: 'TOPICS', 'REGIONS', 'RESEARCH', 'PODCASTS', 'MORE', and 'ABOUT', each with a downward arrow. The main content area features a large image of a young child in a white shirt and a red cape, looking upwards against a clear blue sky. Overlaid on the bottom left of this image is a white box containing the word 'INNOVATION' in red, followed by the headline 'The Two-minute Power Pose That Can Boost Your Performance' in bold black text.

Examples of mirroring



CHECK YOUR ATTITUDE, CHECK YOUR FACE

Now let's talk about your face. What are you doing with your face? So, I would challenge you to look in a mirror sometime and just relax your face and see what your normal face looks like, *your resting face*. Because most of us, when we see what our resting face looks like are not very happy the way it looks. So, I encourage you all to practice what I call an “up face.” An “up face” is eyes bright, eyebrows up, a little bit of curve up on your mouth, not drooping down, but just a little bit up. That's an up face.

I was on an airplane going for one of my client meetings or a conference or something, and this popped up on my Southwest Airlines flight. And so, you're going to be seeing here in the visual, in the slide that we're putting up, what happens when people have a resting face where they think they're just being neutral and serious, but they really look unpleasant, like somebody you wouldn't trust. Like, are they mad? What's going on here?

So, to study the four people that you're seeing here on the screen and think about which one would you like to be like? Well, I would like to be like the lady in



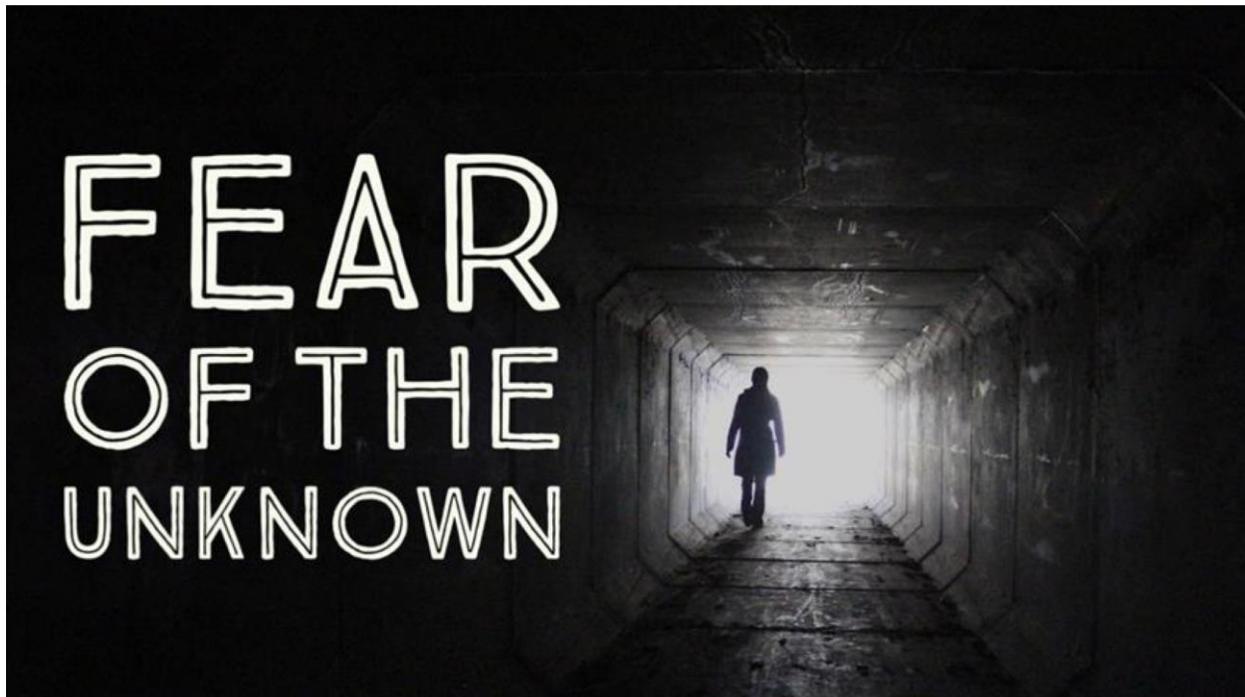
the green dress, because she's got that up face. She looks like she's not mad, she's not happy, but she's holding her composure. She's ready to speak when asked versus some of the others that you see where they just don't look like they're the kind of person that I would like to trust. They look like they're going to come out with something rather radical and perhaps not well-reasoned.

So, write down a couple of thoughts right now is to look at these two arrays and how do they make you feel? And which one would you like to emulate? So, just remember the three L's, it's your look, your language, and your leadership that's going to help people feel better about talking to you, trusting you, inviting you into the things that are important to them.

GETTING PAST ON-CAMERA FEARS

Now let's talk about camera skills. So being on video, being on camera's a totally different thing. Whether if you were in the television studio or if you're here today, like we have a makeshift studio here right here in Leawood, Kansas, and we're actually shooting this on iPhones. When Jonny and Colin come on, a little bit later for their segment, they're going to show you some of the gadgets and gizmos that they use to make iPhone videos look great. But I want to talk about you how you're being on camera and how you come across on camera.

So, first of all, why is everybody so nervous? Why is everybody so nervous? Well is because fear, fear of the unknown. What if I stumble? What if I fall? What if I forget what I want to say?



Well, so there are a couple of things you can do around getting over that fear, that nervousness, and if you're like me, you have a little devil and an angel on your shoulders at any one time saying

“you don't know what you're talking about” (on the devil side) or “you can do this” (on the angel side). There's this kind of a push pull inside of your brain. And so, you need to tell the negative voice, “Hey, I got this. Thanks for sharing.” And tell the positive voice, “Yes, I'm going to go with what you're saying. I know I can do this. I've done this before. I'm well-rehearsed. I'm well-prepared, let's go.” And tell yourself, “It's not about me. It's about my mission and the people in the room, or on camera.”

So, planning ... think about what you want to say and write it down. What are the three things that you must say in every presentation, whether it's a video or an in-person presentation? Then rehearse a little bit. So, you really know that you can speak from your heart. Really, it's okay if you forget what to say. You know, when I talk, I never really know what I'm going to say. I just know that I know my subject matter.

Now, write down your top three fears. Really, seriously. Get out a piece of paper. Write down your top three fears. I know what mine are. You should know what yours are.

HERE'S WHAT TO WEAR

Now think about what you're going to wear. Really know what you are going to wear so when you get in front of the camera or in front of a room so you don't worry about what you look like anymore. You know you're ready, you look good. You are dressed to impress. You know you're going to be wearing some solids and some colors that flatter you usually – jewel tones and solids are better than boring colors (or overly flamboyant colors) and patterns. But a little bit of bling might be your thing.

Women, it's okay to wear more makeup than usual on camera, a little bit of extra jewelry, you know, just still go over the top. Be authentic and just bring your best self to that video experience. I actually had somebody here today helping me touch up my hair and makeup because I wanted to come across as my best self today in this video. But usually I just do my own hair and makeup for most videos.

For those who don't normally wear makeup, a little translucent powder dusted over your face (even the top of your head if your hairline is receding) is a good idea. Just ask a gal pal or someone who is into makeup or shoots videos for advice on the best “no flashback” translucent powder / brush. You can walk into any Ulta or Sephora shop and get help.

Write down top 3 fears



Planning: What You'll Wear

- Dress to impress
- Mirror host
- Solids better than patterns
- Blues, grays, black, creams, whites
- Jewel tones or primary colors
- Makeup & hair



LOOKING GOOD ON VIDEO

Now think about the stage, where are you going to be standing? What are you going to be saying? Where are you going to be looking? Now, if you're in a situation where you've got a producer or somebody who's a host, they're going to tell you where to look. So, my guys here told me where to look and I'm going to look right at that space that they told me to and I'm going to try to come right through the camera to be talking to you. I want to reach through this media and get you to feel like I'm engaging with you because I really care about how I can help you with your camera skills and presentation comfort.

If you are doing this on your own, there's either a red light or a green light or some kind of recording dot. It's okay to look at that dot. It's okay to look down at your notes. It's okay to gather your thoughts but talk straight through that camera. That's your medium in order to win hearts and minds. It's okay to pause, collect your thoughts, have some notes, smile, especially important at the beginning of the end of your video.

And to the extent that you can use natural light and a natural background. I always think that's better than artificial light and an artificial background. So, I'm using a ring light here today. I believe one of my guys who's getting some footage of me actually doing so you can see some of like the behind the scenes, how this looks, not just coming through camera that's around the camera, some of the contraptions that we have. So, you might want to use a ring light if you're feeling like I did today it was a little bit dark in this room we didn't have quite enough natural light.

Now, planning how you're going to sound – you know, annunciation, articulation. That's important. Coming out with some clear, strong way of communicating your thoughts so people feel like you are committed to communicating. No mush mouth, no mumbling. Try to stop the ums and the ahs if you can, because people, you will lose them. It's okay if you lose your thought, just get back on track, slow down, take a pause.

It's okay to slow down your breath, to slow down your speech – especially when you want to make a point. Think about your favorite story, your signature story, and maybe it's about how you got into the business or something that changed your life. If you race through that, people are going to think that you just are racing through it. And if you're not into it, they won't be into it. They're not going to get the full reason that you are sharing that story. But if you share that story with a pregnant pause, a little bit of inflection, people are going to be more engaged. So, slowing down can sometimes be good to allow for that extra emphasis.

So, planning again, that's, what's going to take away fear. Think about who you are being. It's not just what you say or how you look, it's that charisma and commitment to making a difference.

Some animation is good. Some leaning in, some hand movement, using your face and your hands and using your voice so it's not monotone. I like to get into this range with my voice right here in the chest. If I talk up here, in my nose, is a little bit too high for me. I'm going to bring it down into this registration and I'm going to have some good diagram. That's my choice. And that's how I've developed my presence.

Know what you can share. Know at the core of your being rehearse those hard questions, know your subject matter expertise, and then you really should stop being so fearful about being on camera or presenting to a group. So, here on the screen you're going to see some questions and natural responses that I'd like you to think about developing. So, someone asks you these questions you just know the answers because you're grounded in the replies. Remember, it's just a

Internalize answers so can natural respond

1. Tell me about your company/firm. What makes it unique?
2. Tell me about you. Why do you do what you do? Who do you serve and why?
3. How did you become a financial advisor? What led you to this place in your career?
4. What's one thing your clients know about you and/or your firm that prospective clients don't know -- but should?
5. Any interesting hobbies or passion projects to share?

conversation. I'm having a conversation with you whether I can see you or not. I know you're hearing me, and I hope that hundreds, if not, thousands of people will watch this video and think what they can do to step out of their comfort zone into influence more hearts and minds.

Let's take a minute and just watch this short video where last year at the Morningstar Social Digital Hub I interviewed on video camera a CFP named Sheila Padden. See what you think about this conversation. (Video Plays: <https://vimeo.com/335257628>)

Wasn't that great? Sheila has really perfected how she comes across on camera. It just felt like a natural conversation, didn't it? But it wasn't always that way for Sheila and it wasn't always that way for me. And it probably isn't that way for you yet, unless you just keep doing it and doing it and saying, Hey, I can do this, and people want to hear from me. I can make a difference.



So, let's say, okay, where are you going to be on video? You're a little nervous about it. Maybe you're taking the big stage or a small stage, but it's your day is go time. So, get up warm up your voice. Get hydrated, get caffeinated. Do whatever makes you feel good. If you exercise, stretch, get that Wonder Woman pose going on. Warm up your voice, get into the right vocal tone and register, just really get that tone and tenor going, and then just breathe. Do the breathing exercise that Dr. Weil teaches us to really get grounded, grounded, and then just go for it.

And then just be yourself. I mean, really, nobody expects you to be perfect. If you make a mistake if you flub a word, just keep going. If it can be edited by all means, consider that, but if you're a geek. Be a little bit of a geek. If you're a corny person or a little bit more of a fun and flamboyant person, just be that way. Let people see who you are. If you're serious type, be serious, but try to lighten up and let people know that you are a friendly person, even if you're not always showing it with your hands and your body language and your face have a little fun with it. And you're going to find that on the back end, that you feel better about your performance or what you contributed.

So, let's watch one more video. This is a group of financial advisors in Austin, Texas, where the partners were just leaving a more of a captive environment to go more independent. And they really hadn't had the opportunity yet to be on camera much or to share the message. But they're super excited about what they're about to launch and how they're sharing this with their clients.



(Video plays: <https://vimeo.com/348488956>)

I think that what we saw in watching Austin Private Wealth and the partners and the key stakeholders at the firm share their vision and their excitement. It was really endearing and each of their personalities came through.

NOW IS YOUR TIME TO SHINE

So, in closing, I would simply like to say, practice helps. Just keep putting yourself out there and trust me, it gets better over time. Just do it.

Thanks today for being with me and I hope you'll stick around for some of the other Social Digital Hub presentations as the agenda shows when they'll be coming on to the virtual stage here and then on the replay. Thank you.

###

Visit www.SocialDigitalHub.com to see the full agenda for 2021.
You will also find videos and podcasts from prior years.

GO DIGITAL!