



Thought Leadership in Action for Life Insurance

Video Call Hacks: Simple Tricks to Get That Studio-Quality Look



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Virtually overnight, video conferencing and streaming services have become dominant methods for both gathering and sharing information. The trend reaches all industries and businesses, including life insurance, and it's likely a trend that's here to stay.

Whether it's an internal company huddle held remotely, a client meeting, or a webinar for sales and marketing, video calls have become a key communication method today. Video has quickly replaced in-person meetings, as more people than ever are working from home.

The increasing popularity of this medium means that understanding and using video call best practices is important. It's likely that financial professionals* in the life insurance industry rarely think of themselves as on-air talent but following best practices can help keep your video calls professional and polished. In fact, learning how to stream a high-quality video may be a tool that can help you convert new leads and land new clients for your business.

Know the Software

There are plenty of video conferencing applications (apps) and software services on the market today, and each one is a little different. In order to feel comfortable with the technology, review the platform before your call.

Is your microphone automatically muted when you first join? Best practices suggest that you should keep your mic on mute unless you want to contribute to the conversation. Otherwise, you risk your neighbor's landscaper, or your barking dog interrupting the flow of the meeting.

You'll also want to check your internet connection to make sure you don't accidentally "freeze" in the middle of an important message. While it should be on by default, it's also worth making sure the "Mirror My Video" effect is toggled on—if you hold a document up to the camera, you'll want it to be legible to everyone else on the call.

Can You Hear Me Now?

Avoid spending the first few minutes of your presentation or video call troubleshooting sound quality issues. Start by finding a quiet place in your house, and alert anyone around you of your "do not disturb" status.

Then, find a good pair of headphones. Yes, your laptop or desktop has a speaker and a microphone, but you may not want to rely on it. Headphones, either over the head or in the ear, are usually higher-quality devices that pick up your voice with more clarity. If you're in doubt, test your setup before the call.

Position the Camera Favorably

No one wants your forehead or chin missing for the entire video call. Spend a moment before the call to adjust the angle of your camera so that it's raised to a head-on position at eye level. Once the call begins, you'll want to look directly at the camera and not at that little picture of yourself. Now is the time to make sure the camera angle is flattering.

You may need to prop your camera higher than your desk so it's slightly above eye level. You should aim to have your head take up most of the screen, but you shouldn't be so close that you go out of frame.

While you're giving the framing a solid critique, look around you. Your background should convey a professional message, which is why you'll see so many businesspeople sitting in front of their bookcase or workspace. Any messes should be cleaned up prior to your call. You may also consider moving your desk so there is a blank wall behind you.

Use Good Lighting

Effective lighting can be just as important as background and angle. Depending on the time of day and availability of natural light sources, you may need to adjust your blinds or experiment with lamp placement.

Try to avoid sitting with your back to a strong light source or window, as doing so will wash out the image and make you appear as a silhouette. An LED lamp pointed at a nearby wall may help to add additional lighting to your face if necessary. Keep lights at eye level to make sure you're not casting any distracting shadows behind you.

Artificial light sources can be useful, but they shouldn't be too bright—you don't want to look like you're being interrogated.

Set aside some time to prepare your surroundings and lighting before you join the call—you don't want to waste your associate's or potential client's time by troubleshooting these issues while they wait.

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Dress to Impress

If you're working remotely, no one is expecting you to wear your most formal attire. However, your outfit—at least what shows on camera—should still convey a message of professionalism. Typically, solid colors look better on video than multi-color prints or patterns. Large plaids and bold stripes can be distracting as well. You want people to focus on you, not your clothes or accessories.

Check Your Privacy Expectations

Regardless of which video conferencing service you use for your remote meetings, you can run the risk of having uninvited people on your call. Check the privacy settings for the benefit of your organization. Tips for managing privacy may include:

- Having a password-protected login system
- Using a new password or identification (ID) number for each meeting
- Locking your meeting once everyone has arrived
- Adjusting default settings so your microphone is muted when you enter a call
- Determining if the call is being recorded
- Double-checking what's open on your homepage before sharing your screen

It's a good idea to create standardized expectations for video conferencing with your staff/associates to reduce the risk of proprietary information being shared with unauthorized personnel.



Everyone on your team should keep their software up to date and understand the privacy policy of your service.

Treat Video Calls Like In-Person Meetings

While there's a level of technology that separates video calls from in-person meetings, consider the two the same when it comes to behavior. That means it remains important to give the speaker your full attention and avoid multitasking during the call.

When you first join the call, identify yourself—just like in an in-person meeting; greet your fellow attendees and make any necessary introductions.

By following these best practices, you'll be able to project a professional, confident appearance that helps keep your life insurance business growing in these changing times.

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