



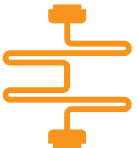




PODCASTING/VIDEO RESOURCES

Client Experience – Sales Process – Hardware

The right client experience technology starts with good hardware, software and peripherals to make your meetings work for your clients. This setup can work with advisory firms of all sizes. The setup is intended per advisor who is meeting and presenting virtually.







Resource Name	Purpose	Notes	Price Range/Where to buy
Audio Device 	Assists advisor in conducting the audio end of the podcast while keeping hands free	For hands free speaking. Wired or wireless headset or Bluetooth compatible devices such as Air pods. You can also use your laptop mic and speaker. (optional) or another retailer.	\$50 to \$300 www.bestbuy.com , www.amazon.com
Webcam 	Shares the advisor's face and office space during the meeting	Needed if you are using tablet. You can use your Laptop integrated camera as well but if you want better video capability an HD or Ultra HD camera is recommended.	EMEET 1080P Webcam DEPSTECH 4K Webcam Elgato Facecam
Lighting & Tripod 	Shares the advisor's face in a well-lit environment.	Create better lighting for your virtual meeting and training. Use natural light source if possible, if not, go into a well-lit room or purchase a light kit.	Ring Light Light Kit
USB Microphone 	For your audience to hear you clearly.	Helpful if you have multiple people presenting. Other microphones work as well. Some microphones can be purchased together with webcams.	Blue Yeti RODE PodMic Shure MV7X PQRQP Wireless Lavalier
Audio Interface 	Designed to give you high-quality audio in and out of your device, so you should get an improved audio quality over using your built-in sound cards.	This is only needed for XLR mics, not USB or laptop mics.	Focusrite Scarlett 2i2 PreSonus AudioBox iOne



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Tablet 	Shares documents and images with the client during the meeting. The iPad or Surface Go with 10" or larger screen.	Microsoft Surface Go, iPad Install Microsoft One Note	\$500 to \$1000. www.microsoft.com www.apple.com
Laptop 	6th Generation i5 & i7 equivalent processor with 8GB or more RAM and video RAM of at least 1GB.	Can be Mac or PC Install Microsoft One Note	\$1000 to \$3000 www.microsoft.com www.apple.com
Tablet Pen 	For writing notes and explaining concepts.		up to \$100 www.amazon.com
IPEVO Document Camera 	Purpose is to project your notepad into your virtual meeting to be able to share your sketches with clients.		\$100 to \$500 www.bestbuy.com www.amazon.com
Cables 	Longer cables for USB to USB or USB to HDMI to move camera or mic to different locations to create different views.		\$5 to \$30 www.bestbuy.com www.amazon.com
Backup Internet 	In case of primary internet interruption, secondary internet source to run the meeting	Wireless hotspot, not a cell phone hotspot app if the meeting audio will be run through that cell phone	



Makeshift Studio Setup + Checklist

1. Find a quiet space where you won't be interrupted.

2. Choose a space where the background won't be too distracting.

- a. If using a digital background, practice adding it to your camera view and test that you properly show up in front of it
- b. If you find yourself looking like a "ghost" consider what you're wearing and if the colors are too muted to pick up. A change in wardrobe could help.

3. Set up mic and camera.

- a. Attach mic to person if using a lavalier.
- b. If other kind of mic, set the proper distance away to avoid distorted audio.
 - i. A good rule of thumb for these mics is to make a "hang ten" with your hand. The distance between the tips of your thumb and pinky finger should be the distance from the mic to your mouth.
- c. Check that video on camera is clear based on the distance and settings.
- d. If audio and/or video is being directly uploaded to your computer, make sure proper settings are in place and equipment is hooked up.

4. Set up lights.

- a. Have ring light off center from camera and not on frame. It should just be a few feet away.
- b. If working with box lights, have at least 2 facing you and your camera. Lights should be behind camera. Adjust so they are on opposite corners, several feet away from your camera. Both should angle in to face you.
- c. Adjust brightness and distance as needed.

5. Test all Equipment together

- a. Audio
 - i. Make sure your clothing is nothing "loud" that could be picked up by your mic when moving around.
 - ii. Double check that the input and output settings are properly set.

6. Give your camera a test

- a. If this is a close shot, make sure you give yourself a little headroom between the top of your camera and your head. If you know you're the type to lean forward when you get into a conversation, give yourself a little more headroom.