



## One-Page Checklist

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### Research and Planning

- Research similar topics on YouTube
- Craft a compelling, keyword-rich title
- Outline main points of the video

### Engage Your Audience from the Start

- Create an engaging opening (question, fact, story, promise)
- Make it clear who the target audience is
- Pretend you're speaking directly to one person

### Content Clarity and Focus

- Use language, examples and analogies relevant to your target audience
- Provide clear, actionable value (focus on the WHY not the HOW)
- Plan a single strong call to action (CTA)

### Technical Preparations

- Test your camera, microphone, and lighting (every time!)
- Ensure a quiet recording environment
- Have a nice background that shows your personality (no fake backgrounds!)

### Presentation and Delivery

- Rehearse your script or main points out loud
- Engage with the camera (smile, eye contact, natural body language)
- Maintain an engaging pace and tone – consider standing up

### Final Preparations

- Approach recording with a positive mindset
- Have water nearby and take breaks as needed
- Don't aim for perfection - imperfections build relationships faster

Print this checklist and ensure each item is checked off before hitting record.

By following this outline, you'll be well on your way to creating valuable and engaging videos that attract your ideal clients.

## Detailed Checklist

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### 1. Research and Planning

- **Research Your Topic:** Search for similar topics on YouTube to understand what works. Look for high-performing videos in your niche and note down the titles, thumbnails, and key points.
- **Craft a Compelling Title:** Ensure your title is clear, concise, and includes keywords your target audience is searching for. Aim for titles that spark curiosity or address a specific problem.
- **Outline Your Video:** Plan the main points you want to cover. A structured outline will keep you on track and ensure you cover all important aspects.

### 2. Engage Your Audience from the Start

- **Engaging Opening:** Avoid starting with your name or company. Instead, start with an intriguing question, a surprising fact, a relatable story, or an overview of what they will gain from watching your video. Examples:
  - “If you're a professional under 45, juggling aging parents and young kids, here are three ways to manage your finances without feeling overwhelmed.”
  - “Are you a young physician struggling to balance student loans with starting a family? Here are five ways you can achieve financial peace of mind.”
  - “Are you a business owner within five years of retirement and unsure how to maximize your retirement savings? Discover the three essential steps you need to take today.”
- **Clear Target Audience:** Explicitly mention who the video is for. This helps in filtering the right viewers and increasing engagement. Example: “If you're a seven-figure business owner nearing retirement, this video is for you.”

### 3. Content Clarity and Focus

- **Specific Audience:** Tailor your content to a specific group rather than trying to appeal to everyone. Creating targeted content helps in building a loyal audience. Remember, content applicable to everyone often resonates with no one.
- **Value-Driven Content:** Ensure your video provides clear, actionable value.
  - You want the viewer to want to work with you, though, so share the WHY, not the HOW. e.g. *why* they may want to use a bond ladder, not *how* they can go do it on their own.
  - Make sure you're not appealing to the DIY audience as that is not your target audience!
- **Call to Action (CTA):** Plan one clear CTA. Whether it's subscribing to your channel, downloading a free guide, or scheduling a consultation, make it clear and compelling. Feel free to use different CTAs on different videos so people don't get used to the same one and tune out at the end.

#### 4. Technical Preparations

- **Equipment Check:** Ensure your camera, microphone, and lighting are set up correctly. Test your equipment (every. single. time.) before recording to avoid technical issues.
- **Quiet Environment:** Find a quiet space to record, free from interruptions and background noise. Put your phone and computer on Do Not Disturb.
- **Background and Lighting:** Ensure your background reflects you and your brand.

#### 5. Presentation and Delivery

- **Scripts or Outlines:** If you're using a script, practice it OUT LOUD before recording. This ensures it sounds like how you talk, not how you write. The more comfortable you are with the material, the more confident and natural you will appear on camera. Remember, we can edit out any issues.
- **Engage with the Camera:** Look directly into the camera lens to create a connection with your viewer. Smile and use natural body language and hand gestures.
- **Pace and Tone:** Maintain an engaging pace and vary your tone to keep viewers interested. Avoid speaking too fast or too slow.

#### 6. Final Preparations

- **Dress Appropriately:** Dress in a manner that reflects YOU and your brand.
- **Water and Breaks:** Have water nearby to stay hydrated. Take breaks if needed during recording to maintain your energy and focus.
- **Positive Mindset:** Approach your recording with a positive mindset. Enthusiasm and confidence are contagious and will make your video more engaging.