



# IndiVideo

by BLUERUSH

Best Practices to Achieve Success

## Preparation

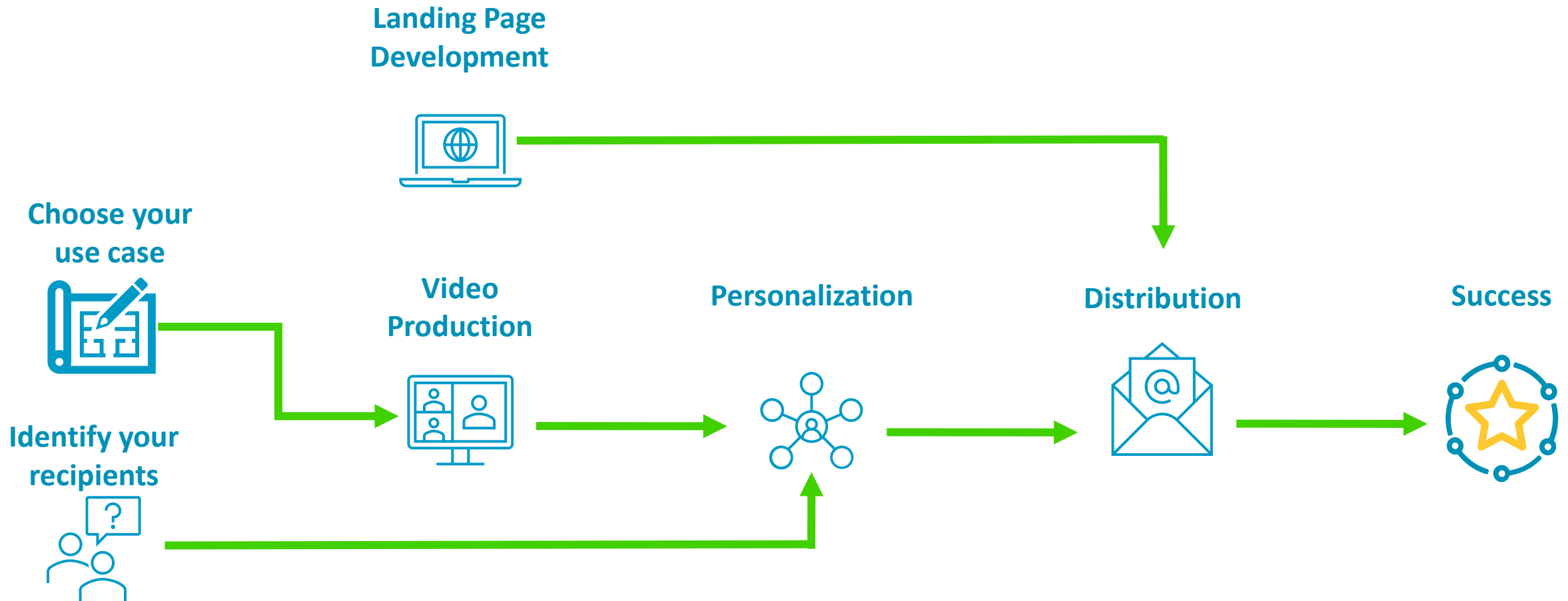
# Things to think about when you start



- Develop the use case
  - Understand the impact the IndiVideo will make
  - How many customers will you put in the initial trial?
  - What is the conversion rate now? And what rate would you like?
- Consider where in the buyer journey the IndiVideo will sit
  - How will the IndiVideo be distributed to customers? e.g. email, SMS, website, behind banking login
- **Remember that IndiVideo is ideally used to compliment existing customer touchpoints and communications. It is rarely used to create brand new communications.**
- What interactive questions will you ask?
  - What actions are you hoping to prompt?
  - Where will the viewers go after clicking the Call-To-Action button?
- How will you measure success of the campaign?
  - What data insights do you hope to gather?

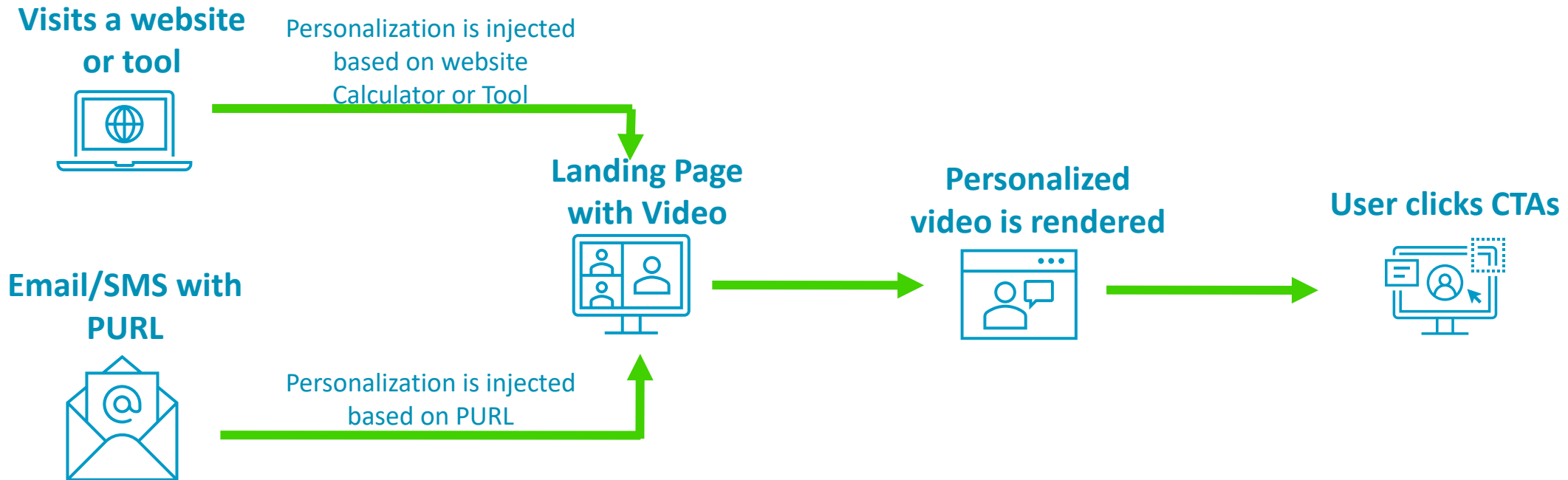
# Best Practices Overview

This document provides a an overview of how to effectively create an IndiVideo to maximize success. It will outline selecting your usecase, how to personalize and distribute, and measuring success.



# End User Experience

Personalized videos can be presented to end users via



## STEP 1

# Choosing your Use Case



Align the use case with departmental priorities and focus on areas over which you and your team have the most control.



Determine your top customer pain points / opportunities for greatest lift.



Ensure the use case has sufficient volume of traffic / critical mass to achieve positive ROI.



Identify how personalized data, education and advice will improve customer engagement and conversion.



Define clear calls to action / next steps for customers.



KPIs must be clear and measurable to determine success.



# How The Market Is Using It

Personalized videos can be deployed across a range of use cases. Ranging from prospecting to post-meeting follow-ups to campaigns, the technology has many powerful applications.

## Prospecting



## Offers and Up-sells



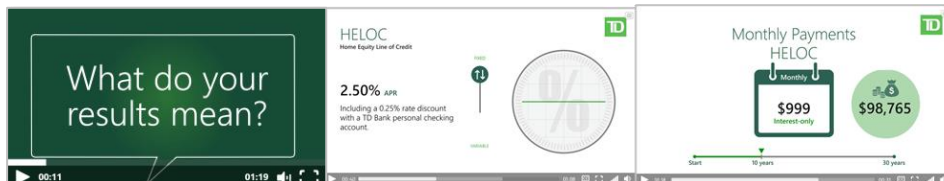
## Education & Awareness



## Market Updates & Performance Reviews



## Explaining Results of Financial Tools



## Onboarding & Service Adoption



## STEP 2

# Structuring your Use Case / Finding the Key Points



Determine the highest value information the customer needs to make an informed decision.



A personalized video should not exceed 2 minutes – limit key points to “must have” info – avoid loading additional details.



Identify how & which personalized information will improve the customer experience.



Keep it simple & clear. Attack any areas that could create confusion.



Avoid promotional content. The customer is only interested in their personalized information and options.

## STEP 3

# Creating Sub-Versions

Determine your top customer segmentations and/or personas.

Determine how each sub-version will uniquely engage that client sub-set (wording, visuals, key information).

Use personalized database to help define optimal sub-versions, track and measure performance.

**Look for efficient methods to create sub-versions to reduce additional costs. Think of video template & versions approach.**

Continually refine sub-versions on an ongoing basis.



# Template Structures

The power of IndiVideo comes from the structure of the video experience.

As shown in these three examples, the level of personalization differs based on the story that needs to be told.

Working with our team, we can help you find the right balance of personalization.

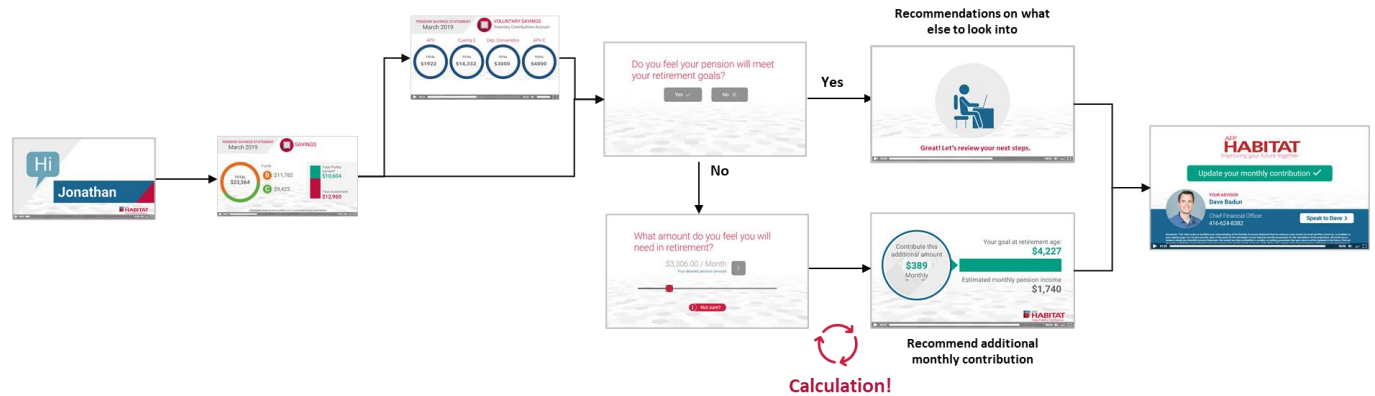
## Basic



## Medium



## Complex



## STEP 4

# Optimizing Production Efficiency of your Personalized Video



Set realistic timelines and goals.



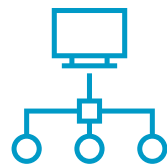
Determine who will be the “point person” to lead from your organization’s side. This is an important role!



Assure all stakeholders are on board and objectives are aligned at the outset.



Determine your organization’s timeframe to provide approvals – of scripts, video edits, personalized data etc.



Assure IT is included and integration planned out. This is often a very simple process but critical to success.

## STEP 5

# Maximizing Usage of your Personalized Video



E-mail / website landing page / existing online calculators & selectors / advertising / social media / in-branch / chatbot are all viable methods of distribution.



Determine your primary method of distribution and expected volume.



Personalized videos are highly engaging – and can be leveraged via multiple distribution methods!



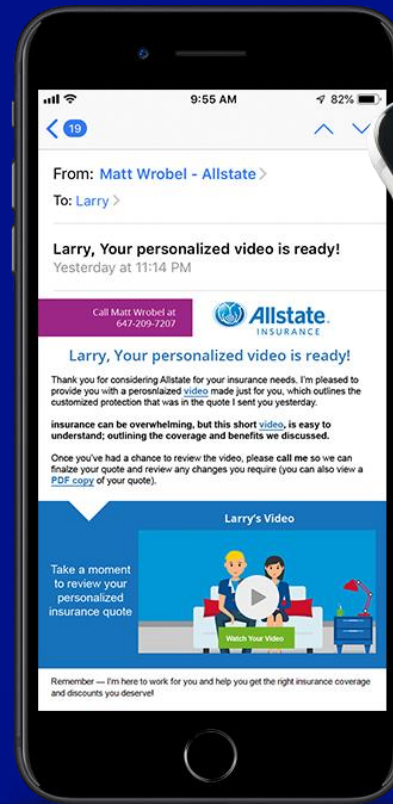
If the primary method of distribution is not high volume, it's imperative to drive traffic to create awareness.



Clear wording, visuals and placement are key to letting people know they can see their own personalized video.

## STEP 6

# E-mail Distribution of a Personalized Video



The e-mail should contain clear wording about the benefits of the personalized video.

The e-mail should contain a visual thumbnail of the personalized video.

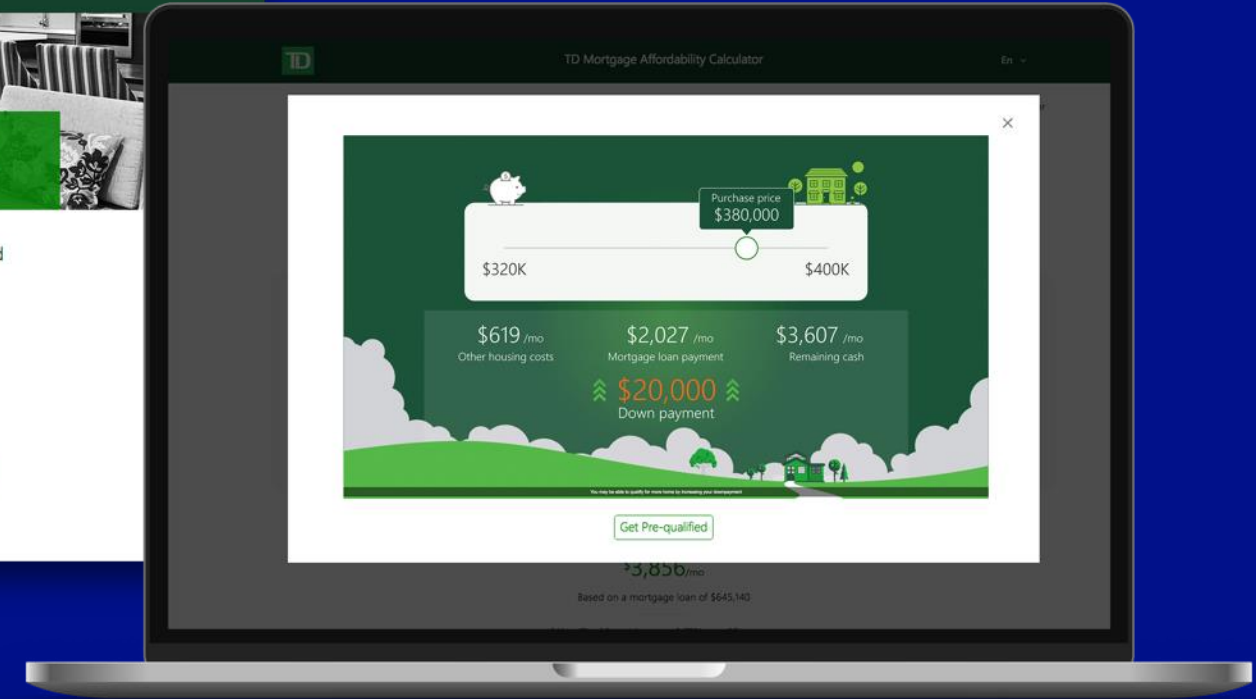
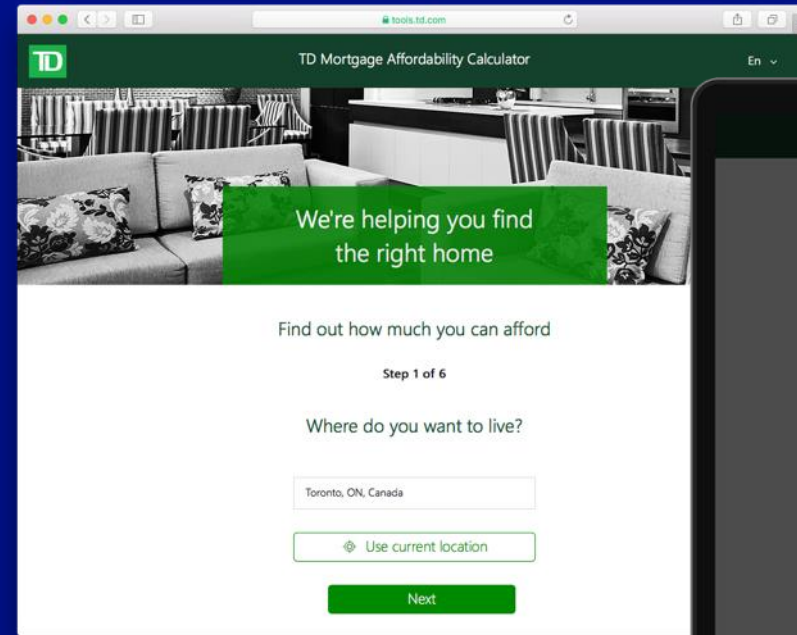
Avoid loading the e-mail with additional content. A singular, dedicated (or as close as possible) approach works best.

A/B test if unsure of optimal wording & approach.

Place our tracking tags on the e-mail so we can measure performance of the e-mail / video / conversion CTA.

## STEP 7

# Personalized Video to Explain Calculator or Selector Results



Make sure the personalized video is aligned with & pays off the questions asked in the tool.

Add in key education and advice to add value to the traditional tool results.

Allow the personalized video to take visual priority on the results page. Otherwise % clicks to play the video may be low.

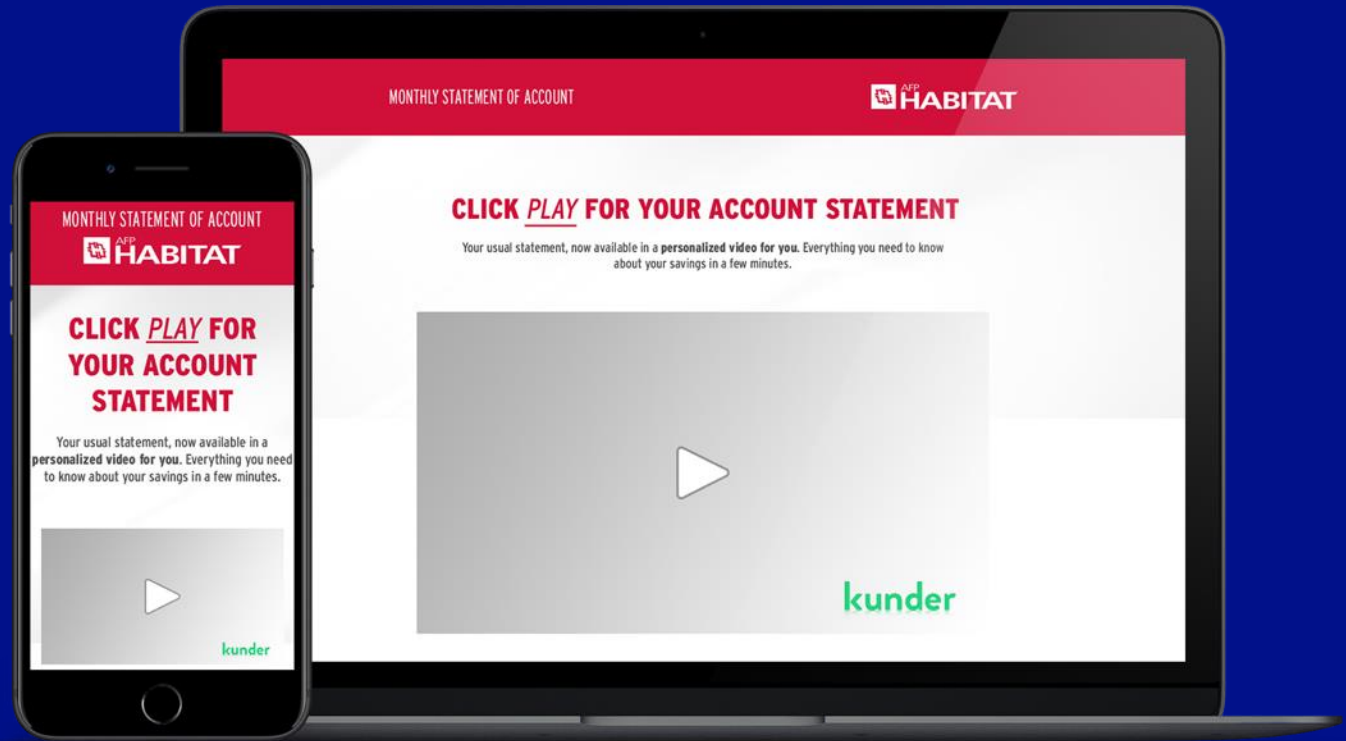
Look for opportunities to segment the video based on information collected – i.e.: income, age, gender etc.

Drive additional traffic to the tool via e-mail, ads, social media etc.



## STEP 8

# Personalized Video on a Web / Landing Page



The web page housing the IndiVideo should contain clear wording about the benefits of the personalized video.

Avoid loading the web page with competing content. A singular, dedicated (or as close as possible) approach works best.

The thumbnail button should clearly indicate what the viewer will get i.e.: **“Play your personalized video to see your offers”**.

Have CTAs (call-to-action buttons) both in the video and just below on your landing page. That will help maximize conversion & ROI.

Place our tracking tags on the web page so we can measure performance of the e-mail / video / conversion CTA.

## STEP 9

# Measuring Success



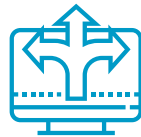
Assure your calls to action / conversion points are measurable.



Place our tracking tags on relevant pages so we can measure performance of the entry, video, conversion and exits.



Our dashboard can yield powerful customer knowledge! Segment audience by known variables i.e.: income, gender, age etc.



Add interactive questions & personalized payoffs to boost customer knowledge (i.e.: are you on track to retire?).



BlueRush will add value by suggesting ongoing optimization based on analysis of your data. Execute where possible!



View your personalized video as a living entity that will evolve and regularly improve the customer experience over time.

## STEP 10

# Personalizing the Customer Lifecycle



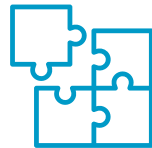
You may have started with a single personalized video i.e.; onboarding new customers.



You can make the entire customer experience personalized – from acquisition, product selection, onboarding, statements and retention.



Map out your customer journey – and decide where interactive, personalized video can be implemented.



Personalized videos can be linked together to create a unified customer experience – available at each touchpoint.



Data from each personalized deployment will generate data to be shared across the customer journey – adding higher levels of personalization for each touchpoint.



[individeo.com](https://individeo.com)