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This Week in Broker

From the *Broker* pages of *Origination News*, our sister publication:

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Light, Camera, Action! Start Training

By Brad Finkelstein



Brad Finkelstein

Video helps make a personal connection between the messenger and the recipient.

For those looking to improve their training methods, technology is the place to turn. But using technology to teach or disseminate information is more than just putting up a PowerPoint presentation. Video, both online and traditional tape or DVD, is the way people are getting their message across.

For Frank Garay, the co-creator of Think Big Work Small, Fairfield, Calif., the "a-ha" moment occurred when he was running a net branch operation. Sales started to slow and one of the things he realized was that his sales people were good technicians but they were not as good on their sales skills.

The staff was dispersed and it would be tough to talk with them in one place at the same time. So he found an online video presentation was the way to communicate with them at the same time to give them sales training.

Eventually this led to the creation of Think Big Work Small, whose name came from a quote that one of the company's founders used to go around saying all the time.

While its main purpose is as a video marketing and lead generation platform, it also provides training to loan officers and ancillary service providers.

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The centerpiece is a daily television show featuring Mr. Garay and Brian Stevens that combines an irreverent look at events in the mortgage industry along with a sales tip.

A recent episode of "TBWS Daily" featured a video that originators can share with their Realtor clients to teach them about the Home Valuation Code of Conduct.

The original version of the daily show, which first appeared in July 2007, featured Mr. Garay and his brother and webcam and not much else. It featured a sales tip and soon they added industry news to the show.

It began to take on its current tone when Mr. Stevens joined the cast in January 2008. "We're corny," Mr. Garay admitted. But the show "just naturally came together." From its humble beginnings, the two now shoot in front of a green screen and production uses the latest in video software.

There are 9,000 subscribers to "TBWS Daily" and many appreciate the irreverent, sometimes cynical tone. Mr. Garay said he has gotten feedback from viewers, including one which states the show is the reason why this person stayed in the mortgage business.

But the show merely showcases what the company does best, which is teaching mortgage originators how to make their own video presentations for lead generation purposes.

Mr. Garay said most sales people have no idea on how to make their own video or what to say. So Think Big Work Small has training seminars to teach them. There are also training videos available on demand, which teach users on topics from how to use the system to how to make a great video.

Users learn how to make a video with music, sound effects and video transitions.

But there is a learning curve involved in creating video presentations and for some it is a difficult concept to grasp. So the company provides syndicated content it can distribute.

On the technology side, rather than using YouTube or a similar distribution method, Think Big Work Small provides its members with a "nice, clean player" to display the video content, Mr. Garay said.

The player is branded with the loan officer's name and contact information. There is an archive section of other videos as well as buttons for the user to

subscribe and/or forward the content.

Members can store content on the company's platform, in their own separate area where they have the ability to track views and ratings.

Videos can be sent as an e-mail or part of a campaign, which can be forwarded. This ties into the customer relationship management system.

Besides the daily show and the video marketing system, Think Big Work Small also has a free rate alert service.

A more traditional use of video training comes from Dale Vermillion. There are videos he produces and sells to mortgage brokers that are more generic in nature. He also does custom videos for some clients.

The custom videos include taping live presentations he has made and also taping training and breaking them down into segments with corresponding manuals.

There are advantages to using video. From a cost standpoint, Mr. Vermillion noted that video is cheaper than constantly bringing someone in to do live presentations.

Furthermore, education theory holds that individuals have different styles of learning information. His training business wants to provide an experience where the user gets "the most impact, the retention and the most reinforcement of the message you are trying to teach."

Video, Mr. Vermillion continued, "Takes those who are visual learners and it really helps them to understand. Because you can incorporate PowerPoint slides and bring key points into the video, where you can't do that in audio, that becomes very powerful.

"By using it as a tool to interact with things like training manuals and then having audio to support that as a more reinforcement tool - when you take those three together it makes for a really powerful system to train people very quickly." By using all three together, he said, the retention factor for the trainee goes up exponentially.

The entertainment factor also has a role in the success of video training, he said.

Mr. Vermillion divides training into 20-minute segments.

Users tell Mr. Vermillion they like the energy level in the video and they like being able to see the

person (unlike audio tapes or books) who is doing the training.

It helps to create a personal connection to the trainer that isn't there with audio or training manuals.

It also helps to make the training "more professional," where the user is seeing something and makes the topic much more engaging, he said.

Users get a better grasp of the material because it brings in two of the elements of learning, whereas audio is just hearing the information.

People are both hearing and seeing the information. The use of video can be incorporated with handouts. Mr. Vermillion's firm believes in the use of self-study materials where the trainee has to fill in the blanks and that helps to improve the training experience.

An issue with the use of videos is that it is not exactly timeless, although he does teach what he called "timeless principles that will work in any market."

Those are supplemented with live conference calls, webinars, training meetings and the like, that are more specific to current industry conditions. This lets the trainee take the core concepts and draw them into today's market, he said.

With corporate clients for which he does the custom videos, Mr. Vermillion's company looks at their business model and how it works and incorporates those elements with the training principles.

Think Big Work Small teaches people how to make videos using their own personal computers with a webcam and microphone attached.

"It is important in video that it is not a constant talking head. That is what makes people crazy," Mr. Vermillion declared.

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