

How to Create a YouTube Channel and Upload Videos

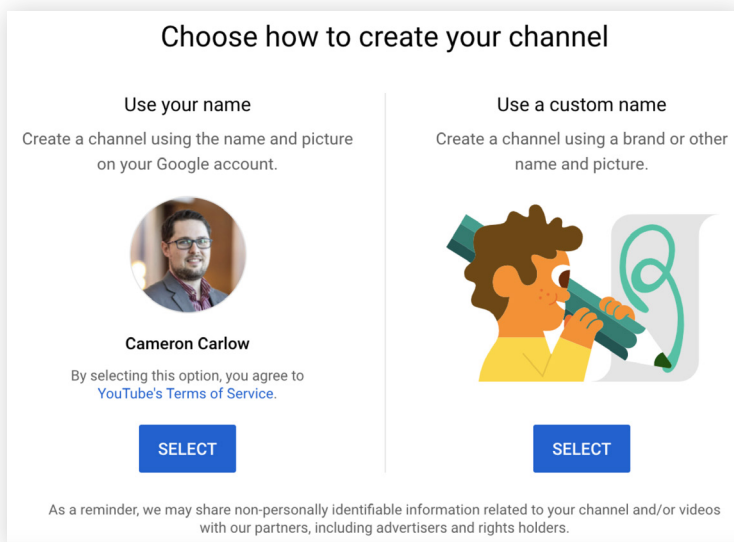
YouTube is a great place to build a following. It is owned by and directly plugged into Google, it allows for you to approach content in a new way, and you can embed the videos you upload to your website, as well.

Before we get started, you'll need a Google account tied to your YouTube channel. If you do not want to use a personal account, please start by creating a business account by going to <https://accounts.google.com/signup>.

Once your account is created, you can get set up with your YouTube channel.

Creating Your YouTube Channel

- 1 Go to YouTube.com.
- 2 Click "SIGN IN" in the top right corner.
- 3 Log in using your Google credentials.
- 4 You will be returned to the YouTube homepage, where you will then click your profile in the top right (where it previously said "SIGN IN") and navigate down to "Create a Channel."
- 5 You will then click "Get Started" on the popup and it will take you through each step.
- 6 The first screen you'll see is an option to create a page under your account name or create a custom account. In this case, we'll create a custom account name.



- Pick a name for your channel, usually it will be your firm name, then check the box to indicate you understand this will be treated as its own account. Click “CREATE.”

Create your channel name

You can use your brand's name or another name. A good channel name represents you and your content. You can change your channel name at any time. [Learn more](#)

Channel name
Test Account 12/100

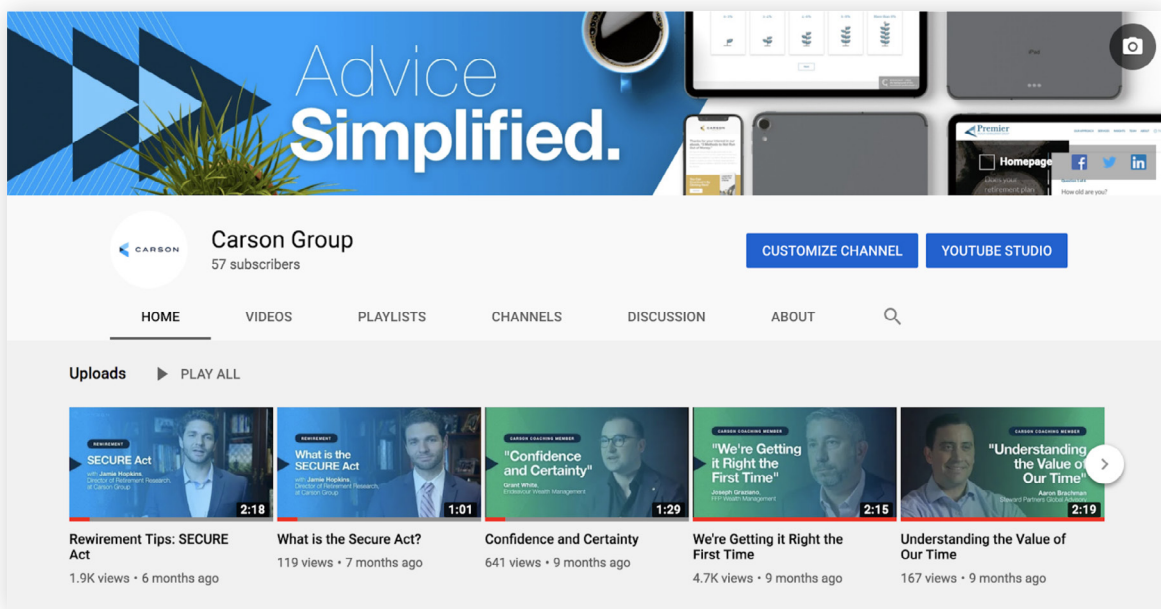
I understand that I am creating a new Google Account with its own settings, including YouTube search and watch history. [Learn more](#)

[CANCEL](#) [CREATE](#)

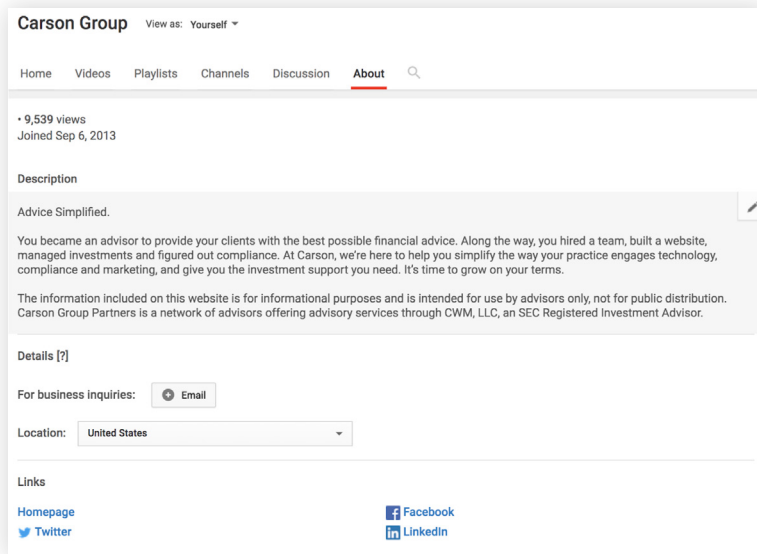
- It's as simple as that to create the channel! Next you'll need to customize it.

Customizing Your YouTube Channel

- Go back to the YouTube homepage.
- Click your profile in the top right and select “Your Channel.” This will take you to your channel page, where you can begin customizing your settings.
- You'll see two buttons on the main page. Click “CUSTOMIZE CHANNEL.”



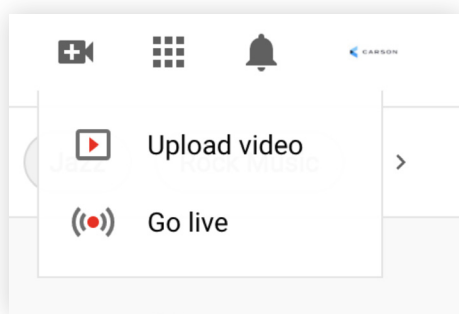
- 4 Start by navigating to the “About” section. Here you can update your page description (and add a disclosure if needed).



- 5 You can also hover over your profile image and cover image to change those. Click the pencil in the top right corner to edit. You'll want a square profile picture, likely your firm's logo, and a horizontal cover image, likely of your building or team picture.
- 6 In the “Home” section you can create and upload a welcome video for first-time or returning visitors to your page.
- 7 In the “Videos” section you can review all the videos you uploaded. This is also where you'll find any videos you create that are “unlisted,” meaning the only way for a viewer to access them is if you provide them the direct link. These videos are hidden from public view.
- 8 In the “Playlists” section, you can see how your videos are organized. If you plan on doing specific series or want to further organize your content, you can add playlists by clicking “New Playlist.”
- 9 If you plan on creating additional channels, they will show up in the “Channels” tab.
- 10 The “Discussion” tab allows you to monitor comments.

Uploading a Video

- 1 On the homepage of YouTube, click the video icon with a “+” sign on the top right and click “Upload video.”



- 2 You will then be asked to select which video you'd like to upload from your computer. Browse for the video and click "Upload."
- 3 Now, while YouTube starts uploading the video, you'll get to work filling in all the needed and optional information.
- 4 You will start with the title – which should be SEO-friendly and focused on your keyword. For example, if you are uploading a video highlighting your firm, be sure to use the keyword "financial advisor" or "financial planner" because you want to show up in search results for those terms.
- 5 Next you'll do the video description. Spend some time on this and be sure to use your keyword again. You'll also want to put any relevant links in the description, a link to your website and maybe even your office email or phone number. Video views don't often come from people directly on your channel, so having this info in your video description gets it in front of people more often.

Test Video 1 Saved as draft

1 Details 2 Video elements 3 Visibility

Details

Title (required)
Test Video 1

Description ?
The description goes here.

Contact Us
email
phone

Follow Us
Facebook.com/firm
Twitter: @firm

Processing video...

Video link
<https://youtu.be/2vX-DwIJ7ow>

Filename
scottwood4-22.mov

- 6 You will then choose a thumbnail. YouTube provides a few options or you can upload a custom image. (Note: the video will need to finish processing before you can select the thumbnail.)
- 7 You can then select a playlist if applicable and also mark if it's a video for kids (you'll almost always mark "no" on this).

Test Video 1 Saved as draft

1 Details 2 Video elements 3 Visibility

Playlists
Add your video to one or more playlists. Playlists can help viewers discover your content faster. [Learn more](#)

Playlists
Select

Audience
Is this video made for kids? (required)
Regardless of your location, you're legally required to comply with the Children's Online Privacy Protection Act (COPPA) and/or other laws. You're required to tell us whether your videos are made for kids. [What's content made for kids?](#)

Yes, it's made for kids
 No, it's not made for kids

Age restriction (advanced)

MORE OPTIONS
Paid promotion, tags, subtitles, and more

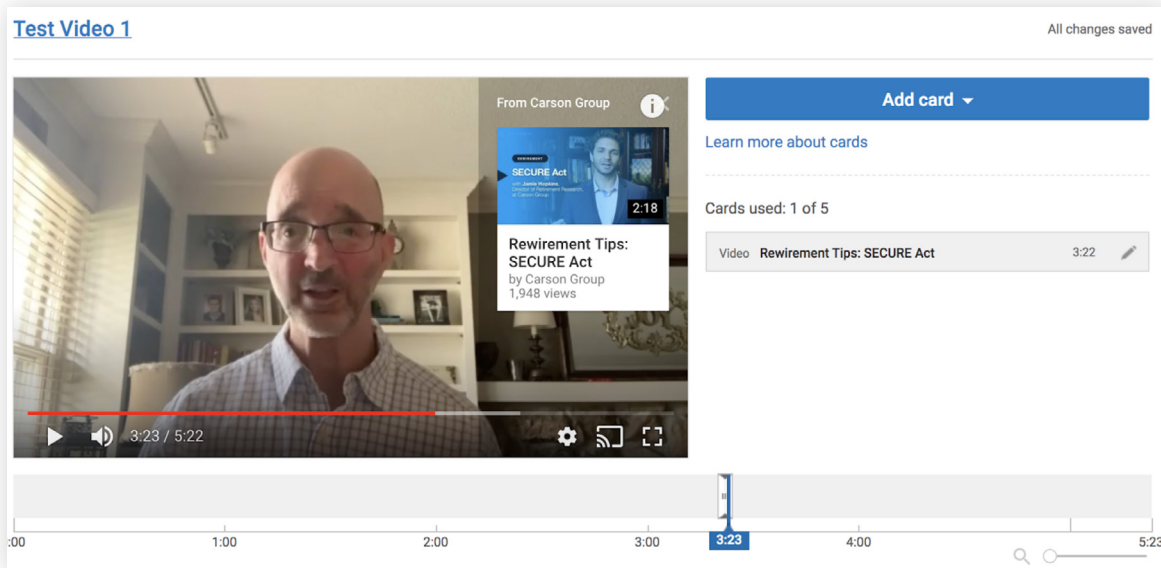
Finished processing

NEXT

Video link
<https://youtu.be/2vX-DwIJ7ow>

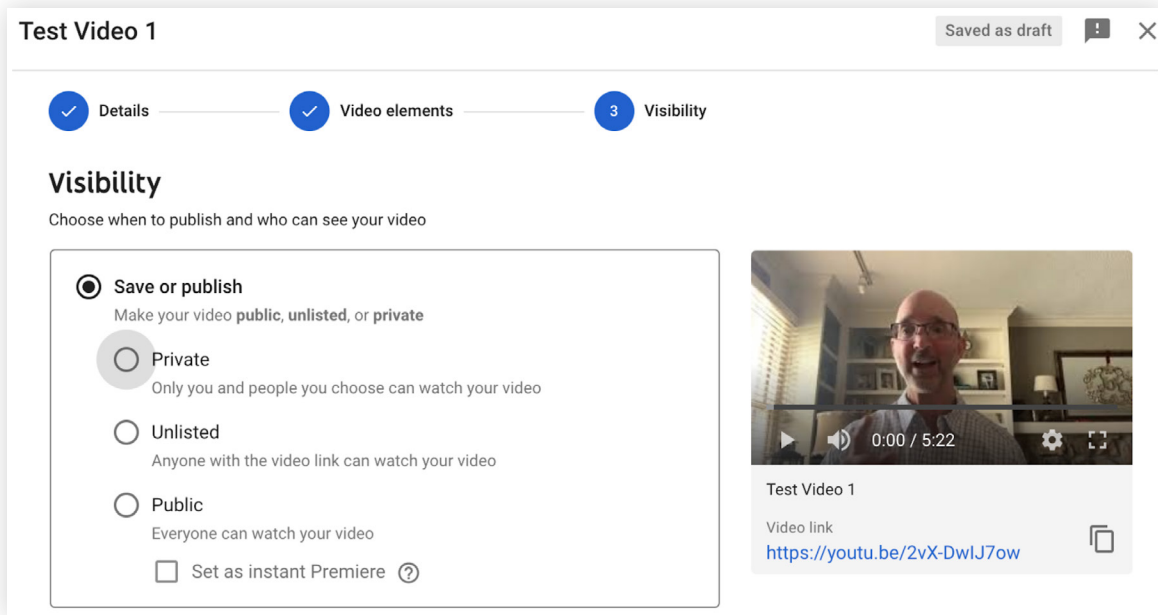
Filename
scottwood4-22.mov

- 8 You can now add “Tags” to your video. If the box does not appear, skip this step and go back to it after the video is finished uploading by clicking the “edit details” button in your video feed. If the box is loaded, you’ll begin adding keywords to your video separated by commas. If your video is on estate planning, for example, your keywords may be: estate planning, creating a will, creating a trust, passing money to loved ones, leaving an inheritance, etc. Start with the main keyphrases and branch out from there. This is how YouTube suggests videos to users, so take your time on this section.
- 9 Click “NEXT”
- 10 The next section allows you to add endscreens or cards. Endscreens are what appear at the end of your video and can link out to other videos, your website, or other material you’ve created. Cards are mini calls to action that pop up while someone is watching the video. (Note: If you want to link to external websites, you’ll need to join YouTube’s Partner Program and get approval from YouTube.) Let’s say you want to create a card for another video, here is out that will look.



- 11 Click “Return to YouTube Studio” in the top right when you are done adding cards, then click “NEXT.” If you did not add any, just click “NEXT.”
- 12 On the final screen you will select if you want the video private, unlisted or public. A private video means you must select specific people who can view it. Unlisted means it will now show up in public feeds or on your channel, so you’d just send the link to the video to anyone who you want to see it. Public videos are open to everyone.

- 13 You can also schedule your video to post at a later date from this screen.



- 14 Click "SAVE" and your video will publish!
- 15 Once it is published, click the pencil icon next to the thumbnail to check your details one last time, including your thumbnail, tags and visibility.



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