
Creating Together: A Client's Journey Through Film, Strategy, and Digital Transformation

TABLE OF CONTENTS

Executive Summary	3
Goals and Key Performance Indicators	3
Blueprints for identifying client's optimal audiences	3
How does the client define success? What are the desired behaviors/outcomes?	4
What quantitative measures, called Key Performance Indicators (KPIs), tier up to the desired outcomes?	6
Education	6
Persuasion	7
Increasing Action	8
What is your expected ROI on video?	9
How does this ROI relate to the true goal of social change?	10
Tools of the trade: defining and tracking KPIs	11
Experimentation and Continuous Learning	12
What variables impact the success of a video and how do you measure them?	12
Rules of thumb	12
How can you run experiments to test different ideas and styles?	13
How to incorporate learning into ongoing production throughout	

the year?	14
How do you create and maintain a quantitative analytical framework?	15
Agenda	17
Documentary Video Creation	21
Stages of filmmaking	21
Filmmaking is problem solving	22
Making a documentary: first steps	23
Single location/character profiles	24
What should I budget for video production?	25
What are the different phases of video production?	28
Marketing and Distribution	31
What could a campaign look like?	34
How do I title my videos for the greatest impact?	37
How do I incorporate SEO in my title, description, and tagging?	37
How do I incorporate "calls to action" in my videos?	39
Which distribution channels are most valuable?	41
How do I decide where to focus my marketing efforts?	42
How can I use paid advertising to learn about my audience and drive traffic to my videos?	43
What are YouTube's best practices for content creation?	43
How to think about paid vs. organic traffic online. What is the purpose of each?	47

Executive Summary

We've developed this report to provide a detailed, step-by-step, data-informed strategic plan that outlines the technical, production, and promotional aspects of a short video campaign, including benchmarks and metrics for success.

The strategies outlined in this report will serve as a “playbook” for the production of a series of videos promoting our client’s campaign.

The launch of our preliminary video interview, and the learnings gained thereafter, will feed into the strategic plan. It is intentionally designed to evolve as we progress.

Blueprints for identifying client’s optimal audiences

As we begin to formulate how the initial videos will be useful for starting conversations with your target audience, we recommend dedicating time to fully understand your audience. We propose the following approach and initial objectives to achieve this:

Objectives

1. Build psychographic segmentation to identify different orientations of people to this type of campaign
2. Identify the concepts and talking points that will speak to these new audiences

Process

Establish useful segments and corresponding messages through survey insights

Public opinions and tribal identities are always changing, so we can't look for psychographic profiles in an encyclopedia, nor can we pluck inanimate insights off a shelf. To ensure timely intelligence, we should let our segments identify themselves.

If we use a survey to ask a cross-section of people about their interest in and orientation to the campaign topic, unique, significant audiences will announce themselves in the results data. Other bespoke questions and survey screening data identifying demographics, involvement, and technology usage will help us build deeper profiles about *who* is receptive to *what* messages, in *which* contexts.

How to do it

1. Collaborate with client and conduct desktop research to hypothesize segments, corresponding messages, and significant audience characteristic dimensions.
2. Develop survey questions that probe interest in and orientation to campaign topic, and degrees and contexts of willingness to engage with related topics.
3. Deliver an efficient, digital survey to a representative sample of 600+ respondents.
4. Analyze survey results.
5. Develop a presentation that articulates whom client should start speaking to, what client should speak about, and how much involvement client should expect from them.

How does the client define success? Desired behaviors/outcomes.

We should think about this from a top-down perspective. First, we begin with the most general goals, which we articulated earlier:

- **Educate** people about the issues that affect them in their lives.
- **Persuade** them to take action on the issues close to the client.
- **Increase** and amplify the scope of support for client's key issues.

Education

We can break this goal into two separate components, which will be important when analyzing the role of video:

- 1. Awareness:** We want people to be aware of the campaign topic that the client is promoting. For awareness, we're not yet worried about achieving a particularly specific state of mind, only that someone understands the existence of a particular issue. Colloquially, we want them to know that the topic "is a *thing*."
- 2. Understanding:** The client also wants to develop a more *informed* population. Beyond knowing that this is a *thing*, the audience should possess some level of meaningful understanding about the topic and why it matters to them. They should understand whom the issue currently impacts, and how and why it should resonate with them personally.
- 3. Persuasion** Even if the audience *understands* the issues and the role of the organization, they may not necessarily agree with the organization's position. Our videos will not be limited to purely informative, objective reporting. We will seek to persuade our audience, get them on our side, and develop a distinct opinion about the issue consistent with (or at least amenable and not in opposition to) the client's campaign. The client's video content should help build, reinforce, and contribute to specific, subjective viewpoints, perspectives, and opinions that shape and focus any *understanding*.

Increased Support

We're following a cascade of psychological change. As we move from awareness, to deeper understanding, to persuasion, we finally arrive at action. While persuasion changed something in the mind of our audience, increased support bridges the mind-body barrier and effects real, tangible action. It could be as modest as an utterance in favor of the organization, or as motivated as a decision to help the client organize an event. This is where words and thoughts become action.

What quantitative measures, called Key Performance Indicators (KPIs), tier up to the desired outcomes?

In this section, we will assign specific measurements for each of the client's desired outcomes. These "key performance indicators" will be as quantitative as possible, and as immediate as possible. Ideally, we want to create feedback loops that indicate our performance in real time. We want to locate the closest things to stock tickers for **Education, Persuasion, and Increased Support.**

Most brands find it useful to select one metric for each of the three buckets that measure engagement with your content:

Audience: Are you reaching the right audience? How well?

Expression: Is your target audience engaging with your content? How much?

Participation: Is your audience endorsing and sharing your content? How much?

Education

Awareness

In some ways, you can simply pay for this metric. By paying for media placements, you can ensure that your video is exposed to any number of people. This number is called "impressions" in an advertising platform like Facebook Ad Manager. However, the appearance of your video icon in a Facebook news feed does not necessarily indicate real awareness for your issue. "Impressions" are not the same as awareness. You can absentmindedly see a mailbox without being consciously aware of its placement and existence.

To truly measure awareness, a separate survey will need to ask a representative sample of people about their recognition of a given issue. The KPI will be differences in stated awareness about the campaign topic before and after exposure to your stimuli. This is commonly called "pre" vs. "post" exposure awareness level.

While surveys can provide a statistically satisfying answer, you can also track growth in **mentions** of your issues in social media. This method will not indicate people who are merely aware of your issues, but it can provide a proxy. More conversation about your issues probably indicates more awareness. However, it's also important to keep in mind that more conversation could simply indicate higher motivation and interest among an audience who is already aware. While potentially helpful, reliance on mentions should be sparing and carefully considered.

Understanding

Understanding is more nuanced than awareness. Educators very purposefully and carefully build tests and quizzes to gauge understanding among their pupils. Likewise, the client will need to deploy surveys to track understanding. Like gauging awareness, the client can release one survey prior to a media campaign, and one survey after the campaign. Asking the same questions in each survey, the client will be able to gauge how understanding for key players, roles, and arguments changes after exposure to their videos. Screening questions in the survey like, "have you seen this video," ensure that the respondents are relevant.

Persuasion

Persuasion indicates a distinct change. The audience moves from either an opposing opinion to an amenable or conforming opinion, or from an opposing opinion to a neutral opinion. Here, too, we need a survey to measure the effectiveness of a campaign.

Through pre and post-exposure surveys, we should ask questions that both explicitly and implicitly expose changes in viewpoints.

In addition, a mix of sharp targeting and rigorous tracking on social media can also reveal progress in persuasion. With a reliable mix of attributes for target audiences (like location, interests, political affiliation, and other demographic and psychographic traits), the client can track how this audience's social media engagement changes over time. Increasing

amounts of shares and likes for the videos, among the same audience, will indicate growing persuasion among the group. Their shares and likes are endorsements for the ideas put forth through video.

Increasing Action

No single video can inspire this level of action in isolation. But video is a critical component for its ability to bring any audience into the client's communications funnel. Once inside, the client can use newsletters and other, more actionable information on its own web properties (like its website or Facebook Events pages) in order to continue a conversation and stimulate action.

Because video, in terms of action, is a link in a larger chain of engagement, its KPIs for "increasing action" will reflect that same nature.

On YouTube, new subscribers will indicate a small "action" that will gradually expose an audience to more of your messaging over time, making them more likely to take significant real-world "action" when a relevant event occurs nearby. YouTube also includes clickable links overlaid on top of video. Clicks on these links to your website, to your newsletter, or to other videos, will also indicate a small action bringing your audience closer to places where the organization can continue a dialogue and inform about more concrete actions like donating or participating in some way.

Similarly on Facebook, clicks on links associated with videos will also indicate the actions you want to create. And once the audience is on your own platform (like your website), a new piece of creative, as a new phase of the communications funnel, will be responsible for persuading and creating action to sign up to a newsletter, or make a donation (for example).

KPIs summary

Education:

Awareness: pre/post survey results; paid impressions; social media mentions

Understanding: pre/post survey results

Persuasion: pre/post survey results; Facebook shares; Facebook Post Likes

Increasing Action: Facebook link clicks, YouTube link clicks, YouTube subscriptions

What is your expected ROI on video?

Video ROI is defined on a per-video basis given the “goals” of each video and the amount of investment expended on each video.

Many organizations track their return on a “per dollar invested” measure.

It’s important that before each “campaign” (to be discussed later in this document) the client outlines its “target” goals and expectations, in order to see if the expected return is met. Over time as the client better understands its current market, its return on initial investments, and its possible reach, the goals for each campaign will change accordingly.

This initial video and campaign will seek to simply build “awareness” as defined above. Later campaigns may seek to develop understanding or awareness. Depending on the goals of each campaign, a different set of metrics would be watched in order to understand how said goal was affected by the campaign.

Before the client starts to experiment, it’s very difficult to give baseline expectations on a per-dollar-invested metric. Each organization has many variables affecting what that return can and should look like.

At the very least, each campaign or video should strive for meaningful engagement. Meaningful engagement can be observed through a few KPIs: watch-time, shares, likes, comments, and views.

YouTube currently prioritizes “watch time” for a video, and the client should consider this a key metric as well. The time and effort going into the creation of a video is only valuable in so far as the content is viewed by the audience. YouTube analytics provides this information.

The highest ranking action is a “share,” followed by “comment,” then a “like,” and lastly a “view.”

Shares are the most valuable as they lead to further engagement on the other content.

Comments tend to signal a desire to engage with the content, and is a greater “step” toward social change than simply a like.

How does this ROI relate to the true goal of social change?

Measurable ROI through KPI is a proxy for what we really want to understand, which is defined by the client’s given campaign goal.

To get closer to this later concept, pre/post surveys, polls, and focus groups are the best tools available to truly grasp the change that occurs after being exposed to the organization’s content.

Due to the costly nature of this form of measurement, there are lower-cost tools that can be used to measure “social change” and give a proxy measurement to the client which can guide future actions.

These lower cost tools are discussed above in terms of measurement that comes through social analytics as discussed below.

Tools of the trade - defining and tracking KPIs

It is critical for the client to promote its video content with media dollars. If a tree falls, and no one is there to hear it, it truly does not make any (meaningful) sound. Similarly on Facebook, no one will “be there to hear it” unless the client buys media impressions. Fortunately, the advertising platforms on YouTube and Facebook will also provide reliable and helpful tools for tracking all the KPIs previously mentioned. Below, a simple list shows where to find each KPI. You should be pleasantly surprised by how easy this task actually is:

- Shares, Likes, Comments, Facebook Post Link clicks: Facebook ad manager dashboard (which also includes demographic insights about the audience performing these actions)
- YouTube channel subscriptions, YouTube link clicks: YouTube Video Analytics

As an easy heuristic, you can trust that any quality medium for your advertising will also provide robust tools for tracking KPIs. These can often be thoroughly customized, and each platform offers tutorials and information to help its customers (like you) use its capabilities as thoroughly as possible.

Experimentation and Continuous Learning

What variables impact the success of a video and how do you measure them?

There are a myriad of variables that affect the success of a video release which are notoriously hard to measure, and often outside of your control. Some of these variables include:

- 1. Video content:** topic selection, framing, communication style, who is communicating the information
- 2. Production approach:** video length, filming style, animation, music
- 3. Timeliness:** relevance to current events
- 4. Marketing:** video titling/descriptions, SEO, distribution channels

Given the inherent complexity of measuring the variables that impact the success of a video, we recommend the use of certain rules of thumb paired with continuous experimentation in order to set the organization up for success.

Rules of Thumb

Based on our collective experience, since the client's goal is to inform and persuade, in general, you can expect better results from your videos if they are:

- more **specific** the issue and the closer tied with **current events**, rather than theoretical/general topics
- full of "pathos," using **humor**, **emotional appeal**, and **analogies** to relate to your audience, as opposed to a dry academic explanations
- built around narrative **story-telling**, rather than a listing of descriptions and facts
- short: videos have a very sharp drop-off in retention, so the more **concise** your message, the better
- punchy: use **dynamic camera** angles and **music** to keep your videos engaging

"**Content is king**," and therefore a majority of the time spent on any video should be upfront in determining what is the most valuable content for your audience. If you are not

creating valuable content, then other variables are inconsequential and no amount of marketing, growth hacking, or slick PR will aid you in developing an organic audience.

The key to measurement is experimentation

“Measurement” of quantitative measures such as your KPIs are relatively straight forward; however, measuring the impact of qualitative factors in your videos is extremely difficult and requires an extraordinarily large sample size in order to gather statistically significant results. In our experience, we’ve not seen this successfully executed. However, through a disciplined experimental mindset, it is possible to build an intuitive understanding of what works in the specific context of your messages and your audience. There are a few approaches that are very helpful here:

- Run “**smoke tests**” prior to starting video production in order to test your messaging before you invest in producing a video.
- Maintain “**creative briefs**” for all videos that are produced in order to note the goals and anticipated results of the videos you produce.
- Run “**post mortems**” with your team in order to analyze the results of your videos and discuss lessons learned and how to incorporate them into future videos.

These will be explored in more detail in the sections that follow.

How can you run experiments to test different ideas and styles?

Run “**smoke tests**” prior to starting video production in order to test your messaging before you invest into producing a video.

There is a good deal of information that you can learn about the success and traction of your videos before ever starting on video production. By leveraging your social media audience, or using targeted Google AdWords, you can experiment with various different topic ideas, framing, titles/descriptions, in order to see which are more engaging and sticky with your target audience.

Recommended tools:

Outbrain

Google AdWords

Further work on this section could provide more specific examples, with step-by-step details on how to execute on different platforms and how to analyze the results.

How to incorporate learning into ongoing production throughout the year?

Maintain “**creative briefs**” for all videos that are produced in order to note the goals and anticipated results of the videos you produce.

A creative brief boils down and captures the requirements and strategic goals of your video project. A good creative brief is essential to inform and guide the direction of the project. A creative brief is also helpful in documenting the video production goals, and outlining the various qualities of the video production for follow-up analysis.

It is helpful to follow best practices in this space. The Institute for Justice, for example, starts all of their communications projects with a catch phrase: “Know your SOCOs (Strategic Overriding Communication Objectives).” In the video production world, these are sometimes known as loglines. It is a series of two or three simple statements that encapsulate the message you’re trying to communicate.

Apart from outlining the communication objectives, the creative brief should also note the “notoriously hard to measure” variables mentioned above in specific detail, such as:

1. What is the topic?
2. How does it appeal to your audience?
3. How does it connect to current events?

4. What emotional appeals/analogies/humor will it contain?
5. What type of animation/music/filming style will it incorporate?

By going through the exercise of putting together a creative brief, you will force yourself to think through the video project holistically and:

- identify strengths and weaknesses in your approach,
- set goals for the video,
- incorporate best practices to ensure that your creative brief captures rules of thumb and insights that have been delivered in this report and are later discovered through your experiences with online video.

How do you create and maintain a quantitative analytical framework?

Run **“postmortems”** with your team in order to analyze the results of your videos and discuss lessons learned.

Once you identify your KPIs as proxies for the ROI of your videos, as described in a previous section, it is important to adhere to an analytical framework where you analyze the results of your videos releases. This analytical framework will look at your KPIs such as:

- Retention/Minutes Watched
- Subscriptions
- Shares
- Comments
- Favorites/Likes
- Organic Views

- Paid Views

It is recommended that you perform a “**postmortem**” or “after-action report” periodically, where you engage your team in a discussion on the factors that led to the success or failure of your various videos, noting what you should incorporate or experiment with moving forward in order to continually improve your videos performance. This mechanism will allow you to put together knowledge documents and build institutional knowledge and inform future video production.

When to run a postmortem?

Ideally, you will hold this meeting 2-4 weeks after the launch of your video and marketing campaigns, while the video is still fresh in your mind, and the video has had a chance to proliferate.

How to prepare for a postmortem?

Before calling everyone to a room, prepare to summarize the video, it’s goals, and it’s impact. The impact should be a summary of the KPIs, demographics, top traffic sources, and a qualitative review of positive and negative comments.

A summary of the total budget and time spent on the video should also be prepared.

How to run a postmortem?

To maintain stakeholder alignment and transparency, the meeting should be attended by as many direct stakeholders in the success of the videos as reasonable. The goal here is to have an open and transparent dialog about impact, and to focus the project toward improvement. A whiteboard is helpful for these meetings in order to capture the reflections of various stakeholders at the meeting for follow up action items. Here’s an agenda template for an hour-long “post mortem meeting”:

Agenda

1. Set the tone

(5 minutes)

Kick off the meeting by stating the purpose of the postmortem, which is to learn from your colleagues. Different stakeholders may have different perspectives on whether something was a success or a failure, and this meeting will help get everyone on the same page. More specifically, during the meeting you will (1) review the impact of the video launch, (2) to unpack factors that have led to its success or failure, and (3) to discuss ways in which you can apply what you've learned to future video production.

The discussion should be a "safe space," where people are encouraged to speak openly, without blame, and with a solutions-focus on how to improve moving forward. Remember, "ABC" -> Always Be Constructive.

Any issue that spurs a discussion that goes over 5 minutes during the meeting should be tabled for a followup meeting around that specific issue.

It is helpful to assign a notetaker that will distribute the notes and next-step action items after the meeting.

2. What was the impact of our video launch?

(10 minutes)

Note: the information in this part of the agenda can be distributed ahead of the meeting, however it is helpful to walk through everything during the meeting to get everyone on the same page.

Briefly introduce the video that you're discussing, describing the title, the logline, the purpose (call-to-action), and the approach taken in the video. If it's a short video, you may want to start by showing everyone the video.

Present a summary of quantitative and qualitative impact of the video on a one-page handout, or on a projection, that includes the following:

1. Summary of the KPIs
2. The demographics of viewers
3. Top traffic sources
4. Qualitative review of positive and negative comments (this could consist of a few examples that capture you audience's reaction to the video)
5. The total time and budget spent on the video

Each of these should be compared to previous videos that you've released to note any anomalies or surprises.

Each of the following questions should be clearly answered:

1. *Which KPIs performed better/worse than the average of our last 5 videos?*
2. *Did we hit our target demographic for this video?*
3. *Were there any unexpected traffic sources for our video?*
4. *Were viewer comments unusually positive or negative for this video?*
5. *Did we stay within our budget for this video?*
6. *Did we launch this video before our deadline?*

3. What factors have led to our success or failure?

(15 minutes)

This portion of the meeting is a "two-bucket" discussion, with the goal of identifying and explaining what went well, and what can be improved, based on the findings reported in

the previous part of the meeting. A whiteboard is particularly useful to note the positives and negatives in separate columns for everyone to see.

Key questions to address during here are:

1. *What exceeded our expectations, and why?*
2. *What performed below our expectations, and why?*

Note that these are a set of *hypotheses*, some of the explanations will raise more questions, some will point to obvious answers. The goal here is to ask questions and discuss the reasons for perceived success and failure on the project. There are no right or wrong answers.

4. How to apply what we've learned to future video production?

(10 minutes)

You should now have a set of notes or white board full of wins and opportunities for improvement. Now is the time to convert those into actionable next steps.

Key questions:

1. *What can we do to sustain and expand on what's working well?*
2. *What can we do to avoid repeating our mistakes or improve our weak points?*

Address the wins/losses one by one, and brainstorm what you can try with your next videos to improve outcomes. Note everyone's ideas as action items for the last section.

5. How can our process be improved?

(10 minutes)

Consider this agenda a *living document*. After going through the exercise of this postmortem analysis, it is time for a meta-analysis of the postmortem itself, as well as any other parts of the video production process that could be improved. The key question here is "*are there changes that need to be made?*"

Key questions:

- *Have we followed up on all postmortem action items from the last meeting?*
- *Are there any tabled action items from previous post mortem meetings that we should revisit?*
- *How can we improve the postmortem to be more useful for all stakeholders?*
- *Are we properly tracking the impact of our videos? Are there data points that are not useful? Are there other data points that we need to be collecting and/or analyzing?*
- *What is the hardest or most frustrating part of the video production process, and how can we make it easier?*
- *What are the biggest challenges or perceived risks for our video production goals, and what are we doing to hedge against them?*
- *Is there something that is requested or desired, but not currently being delivered on?*

Each point raised should be up for discussion with suggestions on how to improve. As in the previous section, not everyone's ideas as action items for the last section.

6. Review next steps

(5 minutes)

Provide a summary of all action items during the meeting, and briefly identify which are important to act on right away, and which should be tabled for later. Keep tabled action items on a list for review during the next postmortem.

Assign owners for each action item to make sure they get followed up on. These next steps should be reviewed at the beginning of the next postmortem for accountability.

Notes from the meeting should be delivered within a few days of the meeting, with action items clearly delineated.

Documentary Video Creation

Stages of Filmmaking

Before diving too deeply into the nitty gritty of making documentary films, let's briefly discuss some basics about filmmaking. In general, there are five stages in the filmmaking process:

Development: Researching story ideas, crafting initial vision, and pitching the idea.

Pre-Production: Honing in on creative vision, pre-interviews, and planning the logistics of production.

Production: The actual filming of the documentary.

Post-Production: Editing the documentary (reshoots/additional shoots if necessary).

Distribution & Marketing: Getting the documentary to your audience.

While there are a lot of things that happen at each of these stages (which will be discussed later), it is important to understand that virtually every piece of video content discussed here has gone through this process to some extent.

Filmmaking is Problem Solving

When it comes to filmmaking, there is no "right" way to make a film. At its base, filmmaking is problem solving and the problem you are trying to solve is that there is a film you wish to

have and it doesn't yet exist. Bringing that film into existence can involve a myriad of steps. The specific steps you take depend largely on what type of film you want to make.

The client has taken several important steps in this process already: you want to make documentary films. These references will serve as your guide rails for determining what steps you need to take in order to make original documentaries based off of the organization's stories.

It is also important to note that films are often never finished; rather they are collectively abandoned. While this concept may seem odd, it is imperative to understand that the client is the one who is in control of the "final cut." You determine if a product is completed to your satisfaction. It's always possible to continue tweaking and editing a film. As a client, your tastes and preferences will determine if something is done or still needs work. Some clients and creatives have looser standards of what "good" looks like. Determining the client's version of "good" is going to be crucial to this endeavor going forward.

Lastly, let's discuss what is probably the closest thing to a law in filmmaking: the *Good, Fast, Cheap Paradox*. Why is this a paradox? When it comes to filmmaking, it is often the case that you can rarely ever have all three. If you want something that's *good* and you want it *fast*, it'll likely be *expensive*. If you want something made *fast* and want the cost to be *cheap*, very rarely will it be *good*. If you want something *good* and want the cost to be *cheap*, it is very likely that it'll take *longer to produce*. This paradox will govern most of the relationships you will have with the vendors and creatives tasked with making the organization's films.

Making a Documentary: First Steps

Since the client will be producing documentaries based on stories and cases that the organization already covers, much of the struggle of finding a topic for the documentaries is already settled. It's simply up to the client to determine which stories they want to turn into a documentary.

Determining which story to turn into a documentary is part of the development stage of documentary filmmaking. Almost anything can be a good documentary. The topic you choose is not as important as the artistic approach taken when making the film. Since the client has a library of stories from which to choose, we recommend that the client create a “story library” that has brief summaries of the stories that can be turned into documentary profiles. That way, the client has an easily shareable document that can be sent to contractors and freelancers, who can then use it to make creative briefs, pitches, and treatments based on the stories that they find engaging.

When choosing a topic, there are things to consider that are independent of whether something will make a good documentary. If a particular case is in the news or is about to be in the news, then that might outweigh the creative and artistic reasons for turning that story into a documentary.

Before picking a story, the primary thing to consider is: ***what type of documentary video do you want to make and how “good” do you want it to be?***

As a genre, documentary has many formats. Deciding on a format nails down the criteria needed to determine what problems you need to solve in order to bring your film into existence. For example, if your documentary requires voiceover narration, then you have to find and budget for that talent; if your documentary requires animation, then you have to budget for the creation of those animations; if your documentary requires multiple shoots at multiple locations, then you have to account for that when making your budget.

Single Location/Character Profiles

Many documentaries fall into the category of ***profile documentaries***. Profile documentaries are stories about a *single subject* that takes place at a *single location*.

Take, for example, this piece we produced for NextDoor featuring [Marian](#). This short ad spot tells Marian’s story and consists of a single interview with B-roll filmed at the event she

hosted. A product like this would be relatively inexpensive to produce, can likely be filmed in a single day, and can likely be made by a “one-man band.”

This promo video we created for [HireVibe](#) is similar. While this film includes more voices than the piece on Marian, at its core it is a single-location video that can likely be filmed in a single day and can be created by a “one-man band.”

For comparison, here is one of our documentaries on [Seattle's Affordable Housing Crisis](#), which falls on the higher end of the budget ranges outlined. Rather than a single profile, for this particular documentary we interviewed several subjects across Seattle. Each of these interviews took place at the subjects' homes or work spaces. A documentary of this caliber is more expensive to produce because it requires multiple shoot days and a larger crew to achieve the final product.

This [12-video series of profiles](#) we produced for Amazon illustrates a hybrid approach that falls between the average and high-level budget ranges we have listed below. We were able to achieve a high production value at a relatively budget-friendly cost by leveraging a combination of in-person and remote production assets. For these pieces, we used a 1-2 person on-site crew with a remote director and producer. All were shot in a single location.

What should I budget for video production?

For the client's foray into documentary filmmaking, let's establish some constraints to limit the scale of the projects and make it easier for the client to iterate a filmmaking process.

Let's assume that:

- All the client's documentaries are single-subject profile documentaries that take place at a single location.
- These documentaries will have one day of production.
- Profile videos *do not* include animation or voiceover talent.

It is important to remember that the cost of a video is inherently variable. More experienced filmmakers will net you a better product, but you're going to pay for that expertise. For the purpose of these example budgets, we've chosen to go with a mid-range rate for talent.

Bare-bones Budget: ~\$6,000

ITEM	RATE	# OF DAYS/HOURS	RATE CALCULATIONS
PER DAY COSTS			
Camer and Lights Kit	352.25	1	352.25
Director	700	1	700
HOURLY COSTS			
Editor	150	20	3000
Assistant Editor	45	0	0
Pre-Production/Development Cost	75	10	750
FINISHING COSTS			
Post-Production Sound Mixer	2500	0	0
Color Grading	1000	0	0
Composer	2500	0	0
Stock Music Budget	500		500
Stock Footage Budget	500		500
VARIABLE COSTS			
Transcription Service (Rev.com)	\$1/min		N/A N/A
Translation			N/A N/A
Archival research			0
TOTAL			
Total	5802.25		

Average Budget: \$8,000-12,000

ITEM	RATE	# OF DAYS/HOURS	RATE CALCULATIONS
PER DAY COSTS			
Camer and Lights Kit	352.25	1	352.25
Sound Kit	405	1	405
Production Sound Mixer	500	1	500
Director of Photography	650	1	650
Director	700	1	700
HOURLY COSTS			
Editor	150	20	3000
Assistant Editor	45	0	0
Pre-Production/Development Cost	75	15	1125
FINISHING COSTS			
Post-Production Sound Mixer	2500	0	0
Color Grading	1000	0	0
Composer	2500	0	0
Stock Music Budget	500		500
Stock Footage Budget	500		500
VARIABLE COSTS			
Transcription Service (Rev.com)	\$1/min		N/A N/A

High-end Budget: \$18,000-25,000

ITEM	RATE	# OF DAYS/HOURS	RATE CALCULATIONS
PER DAY COSTS			
Camer and Lights Kit	352.25	1	352.25
Sound Kit	405	1	405
Production Sound Mixer	500	1	500
Director of Photography	650	1	650
Director	700	1	700
Producer	500	1	500
HOURLY COSTS			
Editor	150	40	6000
Assistant Editor	45	5	225
Pre-Production/Development Cost	75	20	1500
FINISHING COSTS			
Post-Production Sound Mixer	2500	1	2500
Color Grading	1000	1	1000
Composer	2500	1	2500
Stock Footage Budget	1000		1000
VARIABLE COSTS			
Transcription Service (Rev.com)	\$1/min		N/A N/A
Translation			N/A N/A
Archival research			0
TOTAL			
Total	17832.25		

Each of these budgets come with their own set of assumptions:

The *bare-bones budget* assumes a “one-man band” scenario for production and assumes that the editor will handle all of the finishing.

The *average budget* assumes a moderate crew size of three people but still assumes the editor handles all the finishing.

The *high-end budget* assumes a four-person crew and includes a “finishing” budget for polishing the final product.

All budgets assume a moderate “kit” fee, which refers to the cost of renting filmmaking equipment. This cost is highly variable and depends on the type of equipment that the filmmaker owns or is renting.

After completing the initial phase of pre-production, providing reliable figures becomes possible.

What are the different phases of video production?

Let's do a brief overview of some the steps involved:

Development

Since we've already determined the type of documentary the client is going to create and have a bank of stories to choose from, most of the development stage for the client will be centered around treatments. A *film treatment* is a written description of the film you are planning to make. Film treatments often include all the storytelling beats, detailed descriptions of the visuals the filmmaker is planning to capture, and sometimes a mood board that helps demonstrate the look and feel of the film. Once all stakeholders agree on a film treatment and greenlight the making of the film, then it is time to move on to pre-production.

Documents for Development

Creative Brief: Overview of the objectives and goals of the video.

Film Treatment: Overview of the on-screen story of the video.

Pre-Production

Having a thorough and robust pre-production process is incredibly important to having a smooth experience on set.

This means having transparent budgets and detailed schedules. This includes expecting the filmmaker to conduct a pre-interview with the subject to establish rapport and home in on the vision for the documentary. This may include asking to see a script and storyboard or the list of questions the interviewer plans to ask the subject. This could include negotiating depiction and location releases that need to be signed by people appearing in the video.

Pre-production can help make the process of creating a documentary go smoothly and the client should expect pre-production to take upwards of several weeks to completely nail down everything needed to create a profile documentary.

Documents for Pre-Production

Final Budget: A line-by-line budget of the costs of the documentary.

Call Sheet: A comprehensive document that details who is involved in the production, the schedule for the production, the contact information for all parties involved, and any relevant needed to make production happen.

Revised Treatment: An updated treatment that reflects the changes and decisions made in the pre-production process.

Production

If you planned well in pre-production, then production should be easy. It's simply execution and the contractors will handle most of the hard work. It might be helpful for the client to

send a *producer* on a couple shoots so the client can help build institutional knowledge about what it takes to make a documentary film. It's difficult to put into words how hectic it feels being on set and the more knowledge the client internalizes about making documentary profiles, the better your estimates in development and pre-production will be going forward.

Documents for Production

Receipts: Expenses from the day of the shoot; meals, parking, last-minute equipment rentals, etc.

Depiction and Location Release: All people who appear in the video should sign a depiction release. In some instances it might be required to have a location release be signed by a location's manager.

Post-Production

The client is contracting this work out, so its role in post-production is to provide notes on the cuts the director shares with the client.

A lot of things can go wrong in post-production, but they don't have to. It is good practice to establish a schedule for post-production, agreed upon by all parties. This should be done and agreed upon in pre-production but reevaluated as you enter post-production. A post-production schedule helps prevent posts from dragging on too long. It is hard to understate how easy it is to blow past deadlines in post-production.

Set regular reviews, likely three or four in total, to check in on how a project is progressing. When all parties agree that a video is finished it is known as *picture locked*. Once the picture is locked, the editor and the director will work on polishing the video to make it ready for distribution. This involves color correction, sound design and mixing, and finalizing any graphics or animations.

Marketing and Distribution

Releasing the finished product to your audience.

Marketing and Distribution

Keys to Successful Content Marketing:

- Consistency
- Valuable Content
- A lot of content
- Avoiding “salespeak”
- Finding an authentic voice

Create “Campaigns,” Not Videos.

The first recommendation and key insight is that the client should think about this new production endeavor as engaging in *content marketing* and not simply *video production*.

By diversifying your content, and providing multiple content forms, you’ll be able to more quickly gain trust and build an audience.

Video should be the center of your overall content marketing efforts.

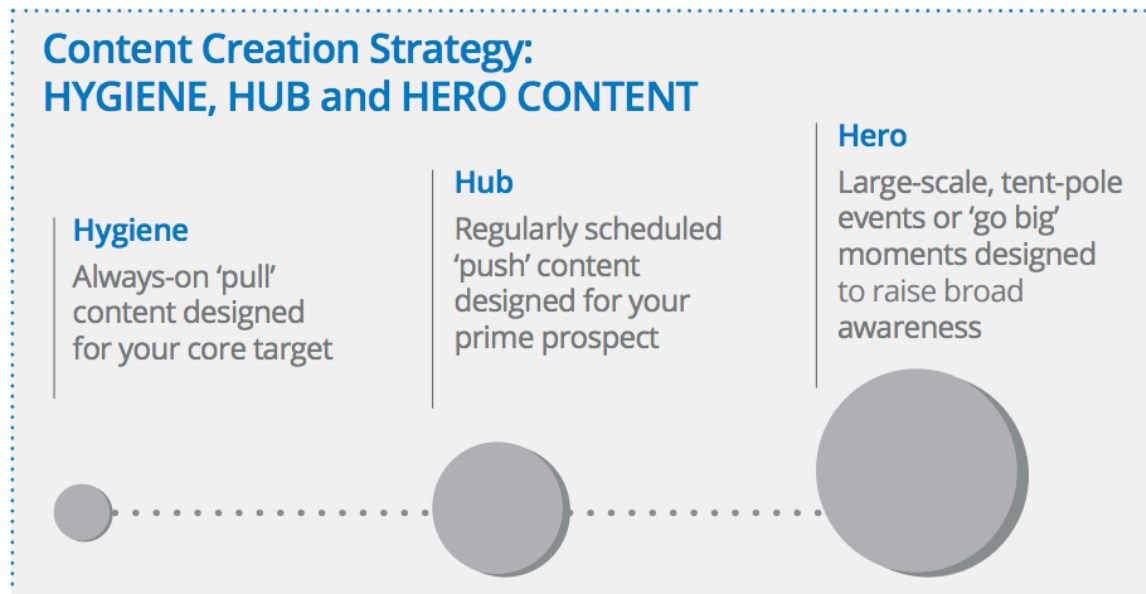
What is content marketing?

Content marketing is the idea of providing value to your audience in order to gain their trust. Over the long-run, this trust turns into “conversions” toward desired actions. In this case, we want to walk the user from awareness, to education, to persuasion, and eventual action.

Video is one way to produce content.

Since the aim of content marketing is to provide value, the topics and kinds of video that might be produced should reflect this. Ask, "What unique content can your brand bring to your consumers to earn their loyalty?" What kind of questions does your audience really have about the world? What kinds of videos would provide true value for them?

This breaks your content creation into three different forms:



Source: YouTube Creator Handbook for Brands

Your campaigns should aim to:

1. **Educate:** Blog posts that educate
2. **Entertain:** Videos that are just plain fun
3. **Inspire:** Make a difference in your audience's lives by inspiring them to take action
4. **Inform:** Keep them up to date with the latest industry news and trends
5. **Convert:** Content is a waste of time unless it leads to converting them to customers

Content needs to be optimized. Here are some of the optimization strategies that need to be part of the content marketing best practice:

Reading and Viewing

This includes a well-optimized structure for easy and quick reading.

Search Engines

Create a list of 25-50 key phrases that customers will use to find you in a Google search.

For Traffic

Learn about the art of headline writing in order to drive traffic and make it easy for people to share your content.

Conversion

Converting traffic into an email subscriber and buyer is the result of constant testing and experimentation.

Mobile

If they can't easily subscribe, read, or share on a mobile, you could be losing 50% of your customers (content creation is only half the solution for [content marketers](#) — you also need to *hustle* it).

Your aim is to move your content. This includes:

1. ***Social:*** Build [global content distribution](#) by growing your [social media](#) networks.
2. ***Email:*** Grow and use your [email list](#) to attract leads and traffic. This can be done with free ebooks and even [Facebook](#).
3. ***Search:*** Optimizing for search engines is a long term strategy that should start to be done from day one. Eventually it will drive more traffic than social networks to your blog and website. Some research shows that it could be as high as 300% more.
4. ***Referral partnering with online influencers and websites:*** This tactic can lead to fast and accelerated traffic.

Source: [The 5 Key Pillars You Need for Epic Content Marketing Success](#)

One of the key terms from the above checklist is *hustle*. This may sound like an odd word to focus on, but it is in our collective experience that the internal drive to distribute your content is perhaps the most valuable asset a company can utilize.

Once you follow the best practices for creating and optimizing your content, only a true desire to *hustle* your content will result in the desired outcomes. This means taking a deep, hard look at the organization's current capabilities, determining which ones are best to focus on, and driving toward leveraging each and every possible outlet. This also means having a relentless approach to getting attention on your "marquee" pieces of content.

What Could a Campaign Look Like?

When the client decides on a topic for production per the principles outlined above, the client should create a multi-pronged marketing campaign.

This means that content will be created and optimized to serve each of the desired distribution channels. It will not only center around the same *theme* or *concept*, but "upcycle" the content that's created for disparate applications.

For example, if the client decides to create a video about one person who is affected by the campaign topic, creating a variety of complementary content -- shorter cutdown edits, photo and copy sets, etc. -- is recommended in order to better capture the target audience's attention. The good news is that much of the content can be easily repurposed to be distributed on different outlets.

- #1. YouTube Video
- #2. Facebook Video
- #3. Marketing Graphic(s)
- #4. Marketing Videos (sub-30 seconds)
- #5. Blog Post

- #6. Social Media posts referring back to original content
- #7. Article (pitched to media)
- #8. Landing page
- #9. Consumer-created content

A prime example of this is found in a [video set](#) we created for Amazon about Camille, an award-winning blind artist.



There were multiple use cases needed, so we used an adaptable approach that would allow us to capture dynamic content.

The final product comprised multiple videos, with various types of audio and video descriptions, presented in different formats and sizes. This allowed the client to showcase the content across their platforms, with each video being optimized for the particular use case at hand.

How to use each channel:

#1-#4 should be requested from the video production team and built into the scope of the contract with the creator. #1 and #2 are similar, except #2 may involve subtitling the video and creating a Facebook-optimized *end card*.

#3 Could be "stills" from the video, with additional text/concepts layered in.

#4 Could be moments/shots taken from #1, or even additional content that didn't make it into #1.

#5 Could be based on video script, and could be an opportunity for in-house clients and staff members to contribute to the campaign. Additionally, consider leveraging those affected by the issue at hand.

#6 Social media posts should be written for each medium where the client finds itself and ad dollars should be spent to promote these messages. Posts will be based on the video scripts, but deliberate time and effort should be taken to assure quality.

#7 This article could be written in-house. It should be pitched to media outlets with the expectation that the content (graphic/video) will be embedded in the article. The video itself could also be pitched to bloggers/media with an ask that they write an accompanying article.

#8 Landing pages take more resources, but for a market campaign of significance, landing pages can help the client optimize for conversions and create separate, unique branding around the campaign topic. This is also a useful tactic when a campaign is done in conjunction with similar organizations.

Example

Here's how the client would do this for the first video:

1. Market Video Product. This will live on YouTube and be the primary push. All additional content should push people back to this product.
2. Another version of this video will be created to adhere to Facebook best practices.
3. Graphics will be pushed out on social media and included in PR materials that push viewers to #1.

4. Short FB/Instagram videos will be created that follow typical BuzzFeed-style video presentations on the issues at hand.
5. Written content, loosely based around the video script, should be included. The blog should be updated regularly and feature the video material in question.
6. Video content should be posted on all available social streams, including email lists.
7. The client advocates should be able and willing to create content for journalists interested in covering the campaign issue or ongoing material.
8. Landing pages are useful for engaging audiences and should be reserved for “high-value” videos.
9. Calls for the audience to “contribute” or “join the conversation” should be followed and require the client to leverage their content for additional context around a campaign.

Using various content forms on each subject can create its own circle of driving traffic from each piece of content to the other. This maximizes return on the investment in the content.

Creating multiple forms of content for each campaign or subject will cast a wider net to capture an audience regardless of the platform where they are most likely to be found.

How do I title my videos for the greatest impact?

Section 4 of YouTube Creator's Handbook

Case study:

[YouTube SEO: How to Rank YouTube Videos in 2022](#)

Titles should be easy to understand and relevant. Don't assume your audience understands more obscure terminology or issue-specific concepts.

Using lists is very popular online: “Top 3 Myths about X”, “Top 10 Benefits of _____”, “The Worst Examples of _____”.

When titling your video, think about your average common sense student. What kinds of concepts, questions, ideas would appeal to them? The title of your video is like the headline of a great article or an ad. If you couldn't see the title of your video being used in an ad, it's probably not a great title.

Additionally, titles should be keyword heavy as they are one of the most important pieces of information used by search engines when determining whether your video should show up or not in search results.

Principles

- Keywords first, branding second. Use the google keyword finder.
- Choose a keyword that isn't searched for too much, but also one that has a fair amount of searches per month. This allows you to rank in a relatively uncrowded market.
- The earlier the keyword is in the headline, the better.
- The keywords should show up in the video description, in the title, and ideally in the text of the video.
- Make sure you upload a transcript of what the speaker is saying so that it registers in search engines.

Use these tools to aid in discovery of good keywords:

Google Keyword Planner:

<https://adwords.google.com/home/tools/keyword-planner/>

Google Trends:

<https://www.google.com/trends/>

How do I incorporate “call-to-actions” in my videos?

Your call to action will be based on the creative brief and predetermined goals for each video campaign. If the goal of a campaign is to build “awareness” vs. “action,” your call to action will change.

End cards should ask the audience to take specific desired actions at the end of every video. This should be accompanied by a voice over highlighting the desired action:

“Thanks for watching our video. If you want to learn more about ____, subscribe below and click the link in the description!”

For common examples of some successful end card templates to test, see these resources.

[How to Create Your Own Custom Endcard](#)

[How to Create YouTube Video Annotation Templates](#) (Video)

One of the keys to YouTube is to keep your audience engaged on YouTube. This means that YouTube, like any good business, wants to keep customers on their platform, namely to consume ads. If you can effectively keep your audience on YouTube, even if it's on other people's videos, you will be rewarded by ranking higher in search results. It's customary to link to other videos, playlists, and the “subscribe” button.

For specific products, you may link off YouTube (say to a landing page or petition), but this should be reserved for special cases where sending a viewer to a landing page is the highest value use of your subscriber.

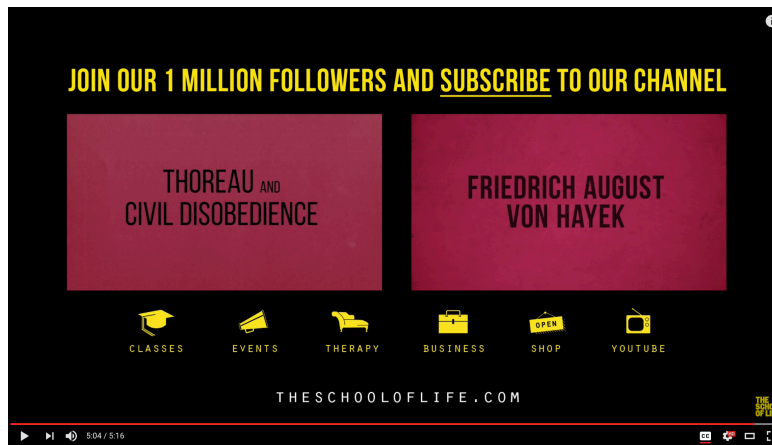
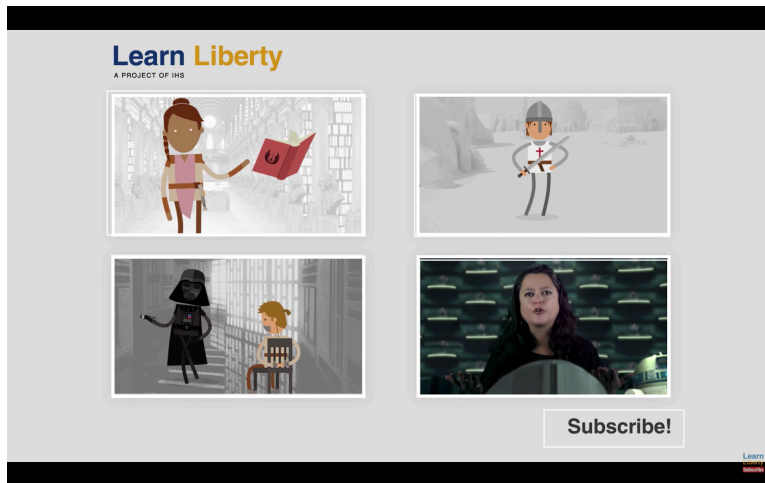
Use annotations. See page 51 of YouTube's Creator's Handbook.



In this example, LearnLiberty used both a voiceover, hand signals, and on-screen annotation to ask viewers to "Subscribe."



On the following screens, LearnLiberty gave viewers the opportunity to keep watching the videos by using annotations. By keeping viewers engaged with these videos, Learn Liberty was able to keep viewers consuming content.



In this example, from a successful YouTube channel called The School of Life, a 2 choice end-card is used in order to keep viewers watching their content.

It is recommended to **offer fewer choices for viewers** rather than too many options in order to minimize decision paralysis.

Which distribution channels are most valuable to the success of my videos?

Experiment, experiment, experiment.

There are certain tactics that all YouTube videos should employ, there are others that require experimentation to decide on effectiveness.

It is recommended that all YouTube videos contain certain elements.

1. SEO
2. Paid Advertising
3. Organic Promotion on Social Media/Email Marketing

Outside of these three channels, it's important to select a specific set of additional distribution channels strictly for "testing."

At the earlier stages of a YouTube channel, one of the most effective tools is to leverage outside media attention from blogs and news outlets.

How do I decide where to focus my marketing efforts?

Based on experimental results with a hypothesis for growth. Depending on the results of the "Bulls-Eye" methodology, the highest ROI channels should be focused on and developed.

One key will be allocating a certain % of each campaign Budget to advertising.

Advertising should be done across all platforms, even if only \$1.00 a day. This simple ad spend will give your content the boost needed.

The key here is to make sure you are regularly tracking, measuring and implementing learning from each tested channel.

How can I use paid advertising to learn about my audience and drive traffic to my videos?

Advertising is perhaps the best way to grow a YouTube channel. Identifying your current audience, then targeting others in a similar cohort will enable you to grow rapidly.

Advertising should only serve to drive more “organic traffic” as that is the more valuable of the two.

What are YouTube’s best practices for content creation?

It is in YouTube’s interest to help you create a YouTube presence in order to have the best shot at success. By creating this guide, YouTube has revealed the most important “secrets” to success.

From YouTube’s Creator Handbook, the most essential guides for content creation:

- Create shareable content.
- Collaborate with others.
- Do videos on discoverable topics.
- Be consistent.
- Target your audience.
- Converse with viewers.
- Create interactive content.
- Be authentic.

The beginning of each video is the most important part. This is your opportunity to hook your audience.

The longer the video, the less likely a viewer will finish the video. You will want to make sure your videos are concise, clear, and have a high likelihood a viewer gets to the end of the video.

This is especially important for a Facebook video.

The higher the “drop off rate” the more unlikely YouTube is to promote the video internally.

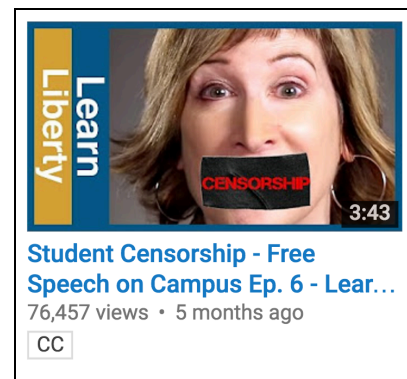


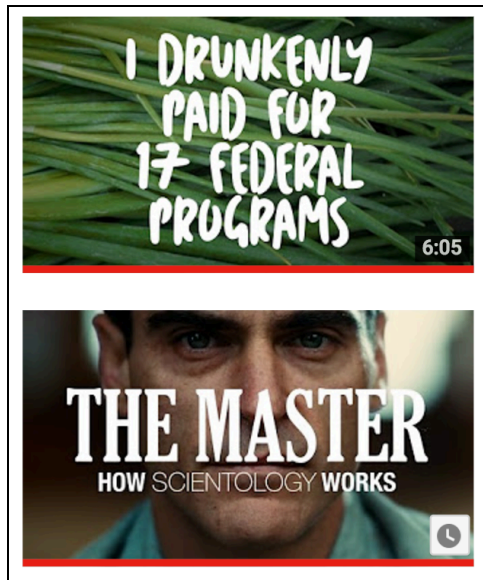
90% of the best-performing videos on YouTube have custom thumbnails.

This is the first image a viewer will see when deciding if they will click on your video. The better the thumbnail, the better the chance a viewer will click on your video.

Make sure thumbnails are well-framed, large, high quality images. Thumbnails are usually small, so a close up is better than a distant shot.

Thumbnails should be created in third party software and not taken directly from the video itself. Think of the thumbnail as an advertisement.





Focus on the first 15 seconds.

Frontload interesting information.

Appealing visuals in the first 15 seconds.

Appealing music in the first 15 seconds.

Current event or other highly discussed issue in first 15 seconds.

Shocking fact (hook) in first 15 seconds.

Use of humor in first 15 seconds.

In the first 30 seconds, it's best to include shocking, surprising or counterfactual information.

Additionally, you'll want to try to change the "shot" every 3-6 seconds to maintain a quick pace.

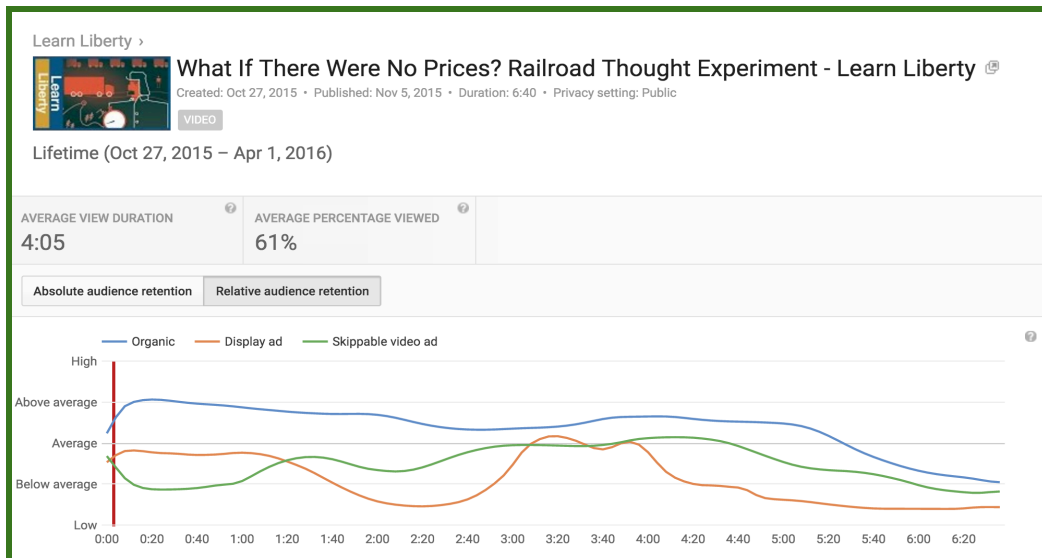
Sweet spot for a video is just around 2 minutes.

Emotions keep viewers engaged and increase shares/likes/comments. Authenticity is key.

Tell Stories

People are hardwired to receive stories in a way that doesn't apply to other forms of communication.

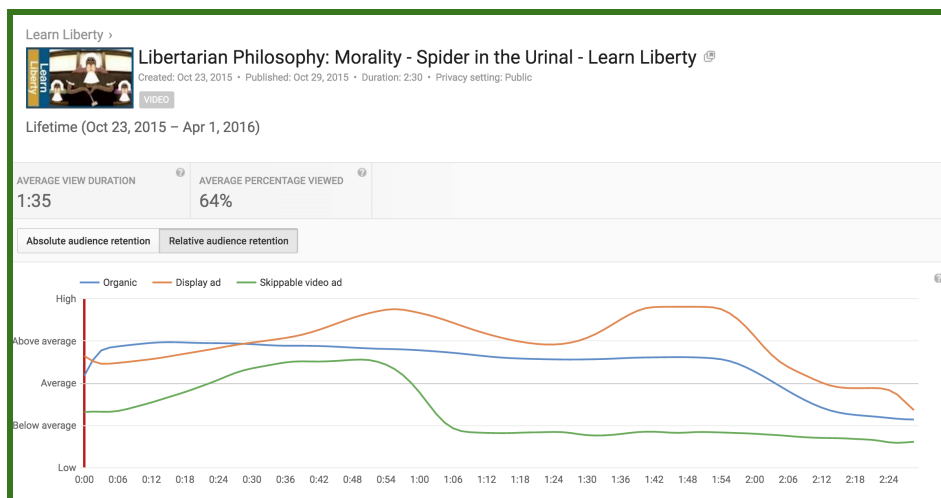
It is in our experience that storytelling is the best way to not only raise awareness, but to slowly persuade and even motivate action.



The above video is compared in this chart relative to all other videos on YouTube of a similar length. Notice the “Organic” traffic hovers “above average” for a majority of the video. When stories are effectively used, we’ve seen an increase in “retention” and “engagement” which is key for the success of any video on YouTube.



Again, notice the “relative audience” retention hovering “above average” for a bulk of the video due to its storytelling nature.

Lastly,
the video



compare
“How CBD

Helped a Child with Epilepsy” to a video on a similar topic, “War on Drugs: What You NEED To Know About Mandatory Prison Sentences”. The former uses storytelling while the later focuses on direct to camera information and data.

Learn Liberty >										
 <p>Liberty is Personal - "Do No Harm" told by Jeffrey Tucker</p> <p>Created: May 20, 2013 • Published: May 22, 2013 • Duration: 2:43 • Privacy setting: Public</p> <p>VIDEO</p> <p>First 90 days (May 20, 2013 – Aug 17, 2013)</p>	 <p>Economics: Is Raising Minimum Wage A Bad Idea? - Learn Liberty</p> <p>Created: Dec 31, 2015 • Published: Jan 14, 2016 • Duration: 3:28 • Privacy setting: Public</p> <p>VIDEO</p> <p>First 90 days (Dec 31, 2015 – Mar 29, 2016)</p>									
	<table border="1"> <thead> <tr> <th></th> <th>AVERAGE VIEW DURATION</th> <th>AVERAGE PERCENTAGE VIEWED</th> </tr> </thead> <tbody> <tr> <td>Liberty is Personal - "Do No Harm" told by Jeffrey Tucker</td> <td>1:55</td> <td>71%</td> </tr> <tr> <td>Economics: Is Raising Minimum Wage A Bad Idea? - Learn Liberty</td> <td>1:56</td> <td>56%</td> </tr> </tbody> </table>		AVERAGE VIEW DURATION	AVERAGE PERCENTAGE VIEWED	Liberty is Personal - "Do No Harm" told by Jeffrey Tucker	1:55	71%	Economics: Is Raising Minimum Wage A Bad Idea? - Learn Liberty	1:56	56%
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How to think about paid vs. organic traffic online. What is the purpose of each?

Paid traffic is good for “awareness” but ultimately if we want to see people change their views, organic traffic is critical. This enables one to understand why they are doing well vs. not well.

Paid traffic, or views generated through advertising, should be leveraged in order to attract more organic traffic. This, however, is not sufficient justification for simply “buying traffic.”

There is a conundrum related to paid traffic.

YouTube values your audience retention as one of the highest factors for how high to rank a video. When you “purchase” traffic that has a high drop-off, meaning few people finish the video, YouTube sees this as a black mark on your video. They will drop it in the search

rankings. This is why it's critical to use paid advertising strategically to target the right customer as defined in the earliest sections of this report.

Organic traffic is as a result of people finding your video through non-paid means and generally means that the consumer is choosing your video, at the cost of anything else they could be doing with their time. For the goals of "social change" organic traffic tends to result in a higher chance that someone will change their mind, be educated, inspired, or even entertained.

Properly leveraged paid traffic, however, is critical to the success of any video project. At the very least, all video, social media posts, and other forms of content marketing should be given a small amount of money at the onset of a video's release for several reasons:

1. Paid traffic signals to others that this video is worth watching.
 2. Social platforms, including YouTube, will generally reward you for spending money on their platform.
 3. Paid advertising results in better analytics allowing you to determine further spend on the paid traffic side.
 4. When targeted properly, paid traffic can often result in high retention, signaling to the platform that your content is high quality, which will cause it to float up higher in the rankings.
-