

LIVE VIDEO PLAYBOOK FOR MARKETERS

Do's, Don'ts and Experts'
Stories From the Field

Award-winning producers, directors and video marketers share decades of combined experience to help you produce better video content, from live social streaming du jour to production techniques that have stood the test of time. Plus, get further insights on the writing and wisdom needed behind any good video, whether it's broadcast live or not.

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INTRODUCTION

Trending these days is the concept of “live video marketing” – where Facebook Live, YouTube and Instagram have stimulated a wave of content creators to think about live streaming as a way to sustain audiences for longer and engage them more deeply.

Yet with any new trend in media, there are echoes of history and a reminder that the foundational skills of storytelling, knowing your audience and making authentic content will always be the baseline to attract viewers – no matter what part in the global video community your viewers reside.

Here’s sound advice about video content and production, whether

or not there is a “live” stream, from innovative and passionate content creators from around the world. As TV show producers, short and feature filmmakers, online series producers, editors, casting and location managers, these experts will give you a glimpse into the changing dynamics of video production.

Their experience spans across the stages of pre-production, production and post-production to create video content for mass consumers, niche audiences, governments, nonprofits and the entertainment industry. These professionals offer lessons learned and stories from the field from traditional production and broadcast as well as modern, live social streaming.



JEFF NAPPI

Director of Software Engineering at
ClearVoice

Jeff Nappi has been experimenting with innovative content marketing before it became mainstreamed. As the former Chief Technology Officer of one of the first fully-remote Internet startups, he developed the technology for and participated in one of the first mobile and streamed Internet reality shows. Follow Jeff on [LinkedIn](#).



“What’s interesting is Facebook and YouTube have incentivized live video. YouTube and Facebook count the minutes of video watched, which allows them to sell video ad slots. They are tracking how live video keeps people’s attention longer, how creating live video can keep them talking about and participating in live streams, and this could mean a different kind of exposure for brands.”



STORY FROM THE FIELD

So back in 2005, before YouTube and Twitter, I worked for a company called i4Vegas, which set out to film for 30 days (8 hours a day) the first live stream on the Internet. It was a marketing campaign to try to shoot in Las Vegas in 30 hotels, streaming 500 hours of HD footage.

We didn't do a ton of planning upfront, even though we probably should have; but we had some cameramen, audio engineers and a lawyer who negotiated on site the contracts to shoot in various locations: skydiving simulators, bungee jumping, casinos and hotels.

It was my job to set up the technology for doing the mobile live streaming, but there was no technology off the shelves to do this stuff back

then. I rigged cameras to laptops in backpacks, batteries and wireless amplifiers – a flash player to switch between cameras.

We were never sure how many people ever watched it (and as a marketing campaign it was a failure), but for some video geeks meeting the challenge we thought it was really cool.



TIPS FROM THEIR PLAYBOOK

Do's

- The value added in live streaming is increased engagement and a sense of urgency, if the video is made interactive. An effective example is a marketing campaign for the TV series 'Mr. Robot'. The producers simulated a hackers' den and gave out \$100,000 in real dollars to play up the show's fictional concept of "debt deletion." What they did incredibly well was pick their audience by live streaming on Twitch, where tech-savvy online gamers gather, and interrupted an E3 Convention.
- The best examples of live streaming still come out of sports, news coverage, and now video games as a form of e-sports online viewing, where there are instant replays; multiple camera angles; and announcers. Live-streamers need to think about how to keep the live stream interesting, and keep engagement up during the broadcast. You'll see some live-streamers will have a puppy pen – where in a split moment they take a live shot of puppies. And who can turn away from a bunch of puppies?
- Pre-produced and edited clips, planned (but not overly scripted) segments will make the live streaming more interesting. It would get boring if you go from interview to interview.



TIPS FROM THEIR PLAYBOOK

Don'ts

- Don't forget that live video isn't new. Back in the '50s and '60s, everything on TV was live; right down to the interviews, the scenes of every show and the commercials. What's changed is the technology, where enormous amounts of video data travel through broad bandwidths. We could learn a lot from watching live late-night TV shows and seeing how influential those techniques remain.
- When marketing to the masses, don't ignore how the comments are playing out on live streaming. Brands have to determine the line when a live stream is working and when it's gone off the context of the conversation, and turned offensive. The Internet still has a terrible anonymous culture of trolls, so brands have to think: How do we moderate live-stream comments and make sure we reduce our exposure to controversy?
- Just because it's live doesn't mean your spots shouldn't be super smart, scheduled and scripted well. A Snicker's Super Bowl commercial attempted to do their commercial live, and it was kind of lame because the execution was poor. There is something about striking the right balance between authentic and scripted when it comes to live video streaming.



ASIF AHMED

Writer / Director / Producer
at Reel Energy Entertainment

Asif Ahmed produces content for major brands, including building AT&T's \$50-million video advertising division by producing more than 30,000 video profiles featuring local businesses in the Los Angeles area. As an award-winning feature film director, he writes, directs and produces films, TV, and music videos. His production company employs film crews worldwide for any video needs. Learn more about his work at [ReelEnergy.com](https://www.ReelEnergy.com)



"Currently, live streaming still has its limits. We often can technically do live streaming and can post on social within 30 minutes, if edited on location, but companies aren't always ready because they have to get the video approval through the proper chain of command."



STORY FROM THE FIELD

I worked with the Los Angeles County Library to create a video about the diversity of Los Angeles County and the population that uses the libraries.

Given the budget, they wanted to shoot mostly in the library, but I wanted to show the diversity and inclusion of LA as a city. So, we opened with someone walking around LA; a guy at the farmer's market; someone biking on the beach; someone sitting in traffic. This put everything into context. A time lapse of downtown LA, of traffic, the beach and a guy doing yoga saying "Welcome to LA!" sets the tone for the piece and the library opening each day.

During this project, we had a discussion about stories and lines;

and we talked about hiring actors to say a few of the lines. As we were shooting, it became clear that some of the bigger lines couldn't be delivered by the library employees. A couple of them could not pull off the delivery effectively, so we cut the piece together, and showed them. We ended up re-shooting the parts with actors; because we agreed what the end goal of their piece was, and it would be better served if done well.



TIPS FROM THEIR PLAYBOOK

Do's

- When working with corporate clients I ask: “What’s the goal? And what’s the call to action?”
- Hire a team, specifically a cinematographer; a good sound person; a camera assistant, grip, lighting and a production assistant. If there is need for animation or effects, green-screen compositing, then you scale up the project as needed.
- Marketing these days is pretty sophisticated, so your content has to be engaging. You want to be authentic. People aren’t thinking of making commercials anymore.
- Make sure your links from your video send people to landing pages that are connected to the video or screen capture. People need to see seamless connections to your email address or an action you want them to do.
- The online version of applause is to click the share button. You want people to know you want them to share your videos.
- Work collaboratively with the marketing agency. They can add an extra layer to push you to be more creative.



TIPS FROM THEIR PLAYBOOK

Don'ts

- Don't do a piece of work if you don't have the right budget. Some production companies try to cut corners, and might leave out the sound guy, or a cinematographer. Remember how the product conveys your work. Having a bad product could be detrimental to your brand.
- If a company is expecting live video, make sure they also have a person or approval system in place before you go live.
- Don't shoot video of a CEO as a talking head in the corporate headquarters. Make people go out to a location to tell their story rather than shooting in a conference room.



CAYLEE SO

Writer / Director / Producer /
Co-Founder of Innovision Pictures

Caylee So brings an innovative voice to cinematic storytelling through films featuring immigrant women. She co-founded the Cambodia Town Film Festival in Long Beach, Calif., and won the Linda Mabelot's New Directors/New Vision Award in 2016. Her first feature film, 'In the Life of Music', premieres this year. Learn more about her company, [Innovision Pictures](#).



"The most challenging part of a video production is finding the best collaborators. When you find experts in their field, they push you to be better in telling a stronger story. Absolutely, the cinematographer, the editors are all storytellers helping you shape the story."



STORY FROM THE FIELD

I come from filmmaking on a small budget, where we try to tell a vast story within a small budget (60-100K). We scouted this location in Cambodia where everything was green with lots of tall, green grass and water that formed a big pond.

A week later when we arrived to shoot, all the green was gone; everything was brown. The villagers had sucked all the water out of the pond to water their other fields. Our actors couldn't go into the pond (as written in our scene), because we didn't know what was in the murky water.

In that moment, I had to re-organize everything I had visualized. I had a prepared shot list, but the scene changed drastically. We all had to step

back and ask what was the intention of the scene? After going through the shot list, and pinpointing the intentions, we chose a new location within walking distance and ended up shooting at the new spot six more times. We had to rethink the shot list and the blocking, and it worked because we knew what the scene was aiming for and kept the shots that mattered.



TIPS FROM THEIR PLAYBOOK

Do's

- Being the script writer can be lonely sometimes, so you have to get critiques. Get people to read your work in progress and get their feedback. Whether you take the feedback or not, their perspectives will allow you to see the vision of the story.
- What makes a story is strong characters that you've never seen on screen. Write what you want to watch.
- Stories have a life of their own; if during shooting, you see what you haven't written open up, you have to address that and let that portion of the story reveal itself.
- Constantly remind yourself, what you love about the story you are telling; hold on to your vision. When you face a storm or hurricane, you will reference that love, and it will keep you inspired to tell the story.
- Prepare your shot list as fully as possible ahead of time. If you have to change it, you know what you need to have and what you can cut out.



TIPS FROM THEIR PLAYBOOK

Don'ts

- Don't work through a very tired state of mind. You won't make the best decisions when you're that exhausted. Take a step back to figure out what's not working.
- Don't compromise your vision. Don't settle, especially when you know you don't have it on set. Never say: "Let's fix it in post."
- Don't skip the wide shots for any scene. In the editing room, those wide shots may be what you need to be able to convey the scene.



CASSIDY GARD

Emmy Award Winner / Producer for
ABC News / Founder of CiGi TV

Cassidy Gard is an Emmy Award-winning digital media influencer with 3.6 million views on her YouTube channel, which hosts a comedic web series called '[Quarter Life \(Crisis\)](#)', vlogs and entertainment hosting. In 2016, she launched her production company [CiGi TV](#), covering [red carpet premieres](#) and [press junkets](#), and she has been a producer with ABC News since 2013, producing segments for 'Good Morning America', 'World News Tonight', and '20/20'.



"I started my own production company [a one-woman company] to show that I can empower myself to produce, shoot, and edit my own pieces so I don't have to answer to anyone else on the pieces that I choose to highlight. Admittedly, I am incredibly particular when it comes to the details of a production, and I definitely appreciate having 100% creative control."



STORY FROM THE FIELD

One of my most memorable interview moments was at Politicon 2016. It was at the height of the campaign, and tensions were very high. Former Mexican President Vicente Fox was making a speech, and one of the trending topics then was about the border wall. I wanted to add his much-needed point of view for the piece I was doing, so I began to make my way through the massive crowds, finding it challenging, carrying all of my equipment.

As a former president, he had a large amount of security surrounding him. With most interview subjects, it's perfectly acceptable to make your way as close to the interviewee and just call out questions to them. In this circumstance, I knew that this strategy would not be acceptable, as

well as potentially dangerous to try and bypass a bunch of Secret Service bodyguards.

As Fox was doing his speech, I approached every single individual on his security team and warned them that when he steps off the stage, I was going to step up to ask him a couple of questions. I knew that if I included his team and gave them a heads up, that hopefully they wouldn't pull me back with my camera.

None of the other reporters did this. And when Fox was whisked off the stage, I continued to follow him. At the security door to the backstage, the security guys held the door open for me and allowed me to walk through to set up my interview. One even said, "She's with us."



TIPS FROM THEIR PLAYBOOK

Do's

- Invest in a light kit, a high-quality microphone, and a DSLR. That is really all you need.
- Post new content every single day. If someone posts incredible content but then doesn't post again for 7-10 days, it doesn't keep the audience engaged. It's imperative to remain consistent, and a huge part of that is to make sustainable content.
- Consistently monitor trade news, casting developments, trending YouTube videos, and anything the Internet is paying attention to. It helps to be constantly engaged on trending developments. If I see that someone is trending and I have a backlog of content that relates to the person, I will tweet out my video to attract the fans to get their eyes on CiGi TV content.
- Before an event, I target videos to celebrity fan sites and tweet at them asking for their fan questions. Once the fans see the interview and see their questions getting asked, it helps them to feel like they are part of the process. That is all I need to do to help the video build steam. The administrators of the account are excited because they feel connected to their favorite talent, and it helps me because I get an inside look into true fandom.



TIPS FROM THEIR PLAYBOOK

Don'ts

- When video marketing, I would never promote a product that I don't actually personally use. For me to do a partner product post, I would do an UGC (user-generated content) video that actually shows me using the product. And I love first-impression videos. Otherwise, it feels too edited and less authentic. In the past year, I've transitioned out of overly edited videos because they feel overly produced and like a commercial.
- Don't overthink every post. If you only want to post things that are perfect and show you living the highlight reel, it won't be relatable to other people. Some of my most successful posts have been ones that have a humorous caption or show a face-palm moment that I'm authentically sharing to show the real side of life.
- Never go for the shock value by asking an outrageous question just to spike views. It's cheap and demeaning, and you won't build a professional reputation.



DOMINIC OW

Managing and Creative Director
at Project Peanut

Dominic Ow created the popular Internet series 'Every Singaporean Son' for the Singapore Ministry of Defence in 2010, which crossed over to cable TV. Dom specializes in short-form reality or documentary serials, releasing seven such series to date. Beyond documentary, he has directed and produced a range of media, from feature films to commercials. Learn more at [Project Peanut](#).



"On a macro or strategic level, the greatest challenge in content creation is attracting an audience. It goes without saying that competition for eyeballs has become exponentially intense in the last 10 years. Even large budgets do not guarantee audience views. From the creator's point of view, the imperative to understand audience tastes and trends, and then craft a product that meets audience expectations, has never been greater."



STORY FROM THE FIELD

The story of making 'Every Singaporean Son' – which is about conscripts going through basic military training – is really about patience and perseverance. I had a strong instinct that Singapore audiences were ready to see such a series and that YouTube – which was gaining exponential mindshare – was the right platform. So I seeded the idea with a friend in the organization that had a bit of influence.

As you can imagine, the Singapore military, like most militaries, is very protective of their image and would rather do nothing than do the wrong thing. So together we kept working our way up the hierarchy, convincing naysayers one by one.

We finally convinced them to let us do a spec episode, at my cost. We did that and used that to convince almost everyone, enough to get us the budget to begin shooting.

After we had cut the first episode, I requested an audience with the Minister for Defence. We showed him the episode. He loved it and never asked to approve any of the episodes down the road before we uploaded them. Idea to production, it must have been nine months.



TIPS FROM THEIR PLAYBOOK

Do's

- Most creative teams don't like pre-production. It's not because they don't know what needs to be done. It's just not sexy and requires a level of meticulousness that most people don't have the patience for. Give pre-production the time it needs. If you don't have the eye for detail, you really don't belong in this industry.
- The first question you have to ask any client – private or public – is, “What do you want to say?” Many clients can't articulate a message succinctly, but that's natural because it's not something they do in their daily work. This is when the job of a content creator is to be a therapist. You have to listen, ask questions, ask again, listen more – much more. It can be exhausting, but this exercise is integral in the creative process.
- Identify the person (not committee) that is empowered to green-light concepts and stories. Find a way to discuss with him or her personally, to gain mutual trust. Only when the message is clear can you begin to tell a story, and push the creative boundaries.



TIPS FROM THEIR PLAYBOOK

Don'ts

- Don't skim on your shots. On location, I always tell myself or my cameramen that it's good to roll, find something else to shoot, even when your mind tells you, you've shot enough. It's ok. Gone are the days of expensive film. You can use it in the edit room as a cutaway, an establishing shot or a close-up.
- Don't cast just for ability but for attitude. Most actors – if they're professional – will reply if the producer texts them to confirm the call time and location.
- Don't ignore the warning signs, and prepare for the worst. With casting, you may have to scramble and finally persuade one of those we you didn't cast to come for the shoot if your chosen person can't make it. Have a list of numbers ready of people you can call for help.



MARIETTE PEETERS

Videographer / Photographer / Writer
at Mudita Media

Mariette Peeters has had her photos published in the New York Times, created videos for international nonprofit Pangaea Global AIDS Foundation, and produced a YouTube healthy cooking show: 'To Cook, Or Not to Cook?' She's currently working on 'Winemakers?', a documentary about retirees-turned-amateur-winemakers in Sonoma County, and creating promotional videos for California-based green technologies specialists, Harmony Air. Follow her at [Mudita Media](#).



"Video editing is like music. You have to have an ear for rhythm and a sense of rhythm when jump-cut editing, quick style cutting video content. Above all, editing needs to be lyrical and complement the message you're trying to convey."



STORY FROM THE FIELD

When I worked on a Pangaea project, I had to edit a short PSA promoting community-based methadone clinics. At the time, it wasn't cost-effective to fly me out to Tanzania, so we had a local staff person interview a woman who used a clinic to get off heroin and reduce her dependence on the drug [which also reduced her risk of contracting HIV]. He shot it and sent me the footage with a brief synopsis of what she was saying in English, but all of it was in Swahili, which of course, I don't speak or understand.

I cut this together into a video shorter than a minute, just listening to the rhythm of what she was saying; really listening to how her speaking flowed; watching the expression and the emotions in her face. By observing her pattern of speaking and inflection,

and making my best guess, I could tell when she was conveying the emotion of her experiences at the methadone clinic, and the help to get her off drugs.

When I sent back the piece with subtitles, our staff in Tanzania was shocked, because the cuts were perfect. It shows you something about rhythm and really listening. Even if you don't speak the language, rhythm really helps with editing something.



TIPS FROM THEIR PLAYBOOK

Do's

- If you're launching your own channel on YouTube, have a specific goal and an aggressive marketing strategy. It's a long-term project where the marketing is a platform in and of itself.
- Stay fresh with styles and experiment with different shots and techniques. Challenge your boundaries. Gain expertise by practicing. Thinking you can succeed on talent is a huge trap. Drive, determination and practice are the key things to your project's success.
- Nowadays most people watch video without sound, because they are lying in bed with a partner and don't want to disturb them. So, try to add subtitles, large easily readable text that complements the video.
- If you're trying to capture B-roll footage in a market environment, to get the clothing and mood of the city, or plan to interview in an open space; have respect for the people that might be in your footage and ask people for permission to capture them in your footage. It doesn't always require that you speak their language. Asking through gestures can be enough.



TIPS FROM THEIR PLAYBOOK

Don'ts

- Don't always follow what the customer wants. In some cases, you've been contracted to work with someone with a specific vision, and they may be fixated on something, like a song. But, you should keep a wider perspective. If you realize it won't work too well for what they are trying to do, you have to be skillful in how you explain alternatives.
- Don't give up. Keep working at something, even if you think something isn't working well. Keep trying different ways to see the story and how other stories might serve your purpose.
- Lines between marketing and content these days are blurred. When a celebrity talks about drinking Pepsi on social media, it's marketing if they are being paid for it, even if a lot of people don't know that. These days nothing is a straight up ad, so it's the content or the style that will draw a specific audience.
- Don't forget to have a lot of batteries, back-ups, solar charging packs, and a full range of adaptors for shooting in different countries.



PISETH THA

Director / Producer /
Co-Founder of Studio4 Production

Piseth Tha produced and directed three TV docu-dramas series for young Cambodian audiences that combine serial drama with discussions and debates on TV and social media platforms. Wildly popular in Cambodia, 'Loy9', 'Snaha9' and 'Klahan9' (translated to English: 'Cool9', 'Love9' and 'Brave9' respectively) aim at building civic engagement, educating youth about sexual and reproductive health, and encouraging youth employment and economic security. See snapshots of his work on [YouTube](#).



"Before we start, we have a strategy meeting with the international nonprofits, calling together all the stakeholders to discuss ideas for a spot. The main question I ask is: "What is the message we want to deliver?" When we have too many messages, it makes for a confusing PSA (public service announcement). So I really work with people by telling them that technically we have only 1 minute or 40 seconds. We have to focus on one idea, and it has to be a clear idea."



STORY FROM THE FIELD

I try to approach each segment with a little comedy and fun, but also make sure the information is clear. I question myself constantly: “Are we doing this for our audience?” It’s not for me (the director) or the producer. It’s for young people who don’t often have a voice.

In creating PSAs, if you don’t understand the audience, if you start too seriously, it won’t be successful.

I go out and meet viewers in the villages and provinces. Everywhere I go, they say: “That spot was really funny,” and at the end, without a doubt, 10 out of 10 people will repeat back the message to me exactly as we intended. It feels really great to hear them say that, and it gives me a sense

that we have created a discussion that could help people.

There are those who will post their comments on social media and critique us or praise the ideas on our YouTube channels and Facebook. We have a million followers on Facebook. It means that the comments spark real debates. The most important point is to create the discussion, to open the conversation, especially for youth audiences who don’t get heard by politicians or policymakers.



TIPS FROM THEIR PLAYBOOK

Do's

- Make sure the message is sharp and decide with the agent/funder/agency what the message is. Make sure everyone agrees on what that message is.
- Always keep the audience in mind before deciding on the format. In Cambodia, our team came up with the idea to create a TV magazine geared at 15-to-30-year-olds; we created different kinds of segments (part talk show, part docu-drama, part drama analysis), so that youth were guided through discussions on the tough issues we touched on.
- No matter how serious the topic or heavy the social taboo, for a young audience, we played with comedy and tried to contrast ideas so no one in the family felt left out. We created characters to give the urban and rural perspectives; conservative or traditional views too, so that no one felt judged, and we could make it an open discussion.



TIPS FROM THEIR PLAYBOOK

Don'ts

- When tackling touchy social issues, don't assume young people will pick up all the learning points and lessons in the drama. It helps to emphasize the messages again with additional segments.
- When working with small budgets: Time, budget and quality are constantly in a struggle. Don't go into production by compromising your resources.
- If the budget permits, don't leave out pilot testing. Pilot testing before broadcast helps you find out what doesn't work before it goes to larger audiences.



ELI BROWN

Director / Writer / Editor / Producer/
Owner at Burst Films

Eli Brown is an award-winning director and producer whose documentary TV series 'The Brain Fitness Program' and 'Brain Fitness Frontiers' and other documentary programs raised over \$50 million dollars for PBS. Follow him on twitter [@postbrooklyn](https://twitter.com/postbrooklyn).



"All media creation is a collection of choices – what to focus on, what to see, what not to see, what to hear, what not to hear – and all of it conveys meaning. Something that is completely lost in our media-obsessed, rapid-response culture right now is that all of the media that is generated and consumed has a point of view. As someone creating that media, understanding that your role in it is not invisible is an important concept to be aware of and to take responsibility for."



STORY FROM THE FIELD

In documentary, sound is more than 50% of the experience, so getting the best audio you can at the source is almost more important than getting the best images.

I do most of the post sound-mixing on the programs I produce, so I'm intimately aware of the pitfalls that occur when receiving poor or mediocre sound that has been recorded in the field. Fortunately, there have been incredible advances made in the past five years alone which make salvaging even some of the most poorly recorded sound possible. This is only helped out in the stage of mixing if someone during the production bothered to record "room tone" – or, the sound of the room, when no one is speaking.

It's a common practice, but it is also one of the last things on people's minds when they are rushing about on a tight and over-scheduled production. But it is incredibly useful for cleaning up bad audio, because it allows the sound mixer to really sculpt the dialogue track down to a point where it would sound clipped or choppy but clean – and then add the room tone in a soundtrack and suddenly make that clipped or choppy audio sound completely natural.



TIPS FROM THEIR PLAYBOOK

Do's

- Try to think of what the show will look like before you shoot a single frame of it.
- Video content creation generates enormous amounts of data, and a lot of that data only exists in a digital format. And a lot of that data is practically priceless, so keeping that data safe, secure, searchable and retrievable is fundamentally one of the most important things you can figure out.
- Try to get the sound in production with at least two mics, if possible, but even more important is to get room tone.
- An ounce of pre-production is worth a pound of production. Always give yourself more time to pre-produce something than you think is necessary. Unfortunately, in today's accelerated economy, you almost never have this luxury – but if you do, take advantage of it. Scout locations thoroughly, plan through your timelines for each day, including timing for meal breaks and timing for any location changes (which are a huge problem on production).



TIPS FROM THEIR PLAYBOOK

Don'ts

- Don't shoot without committing to point of view. If you don't know what that film is before you start, sometimes it's important just to make a guess and commit to it – even if it changes in the edit room. If you make a strong choice in the process of shooting it, that choice will help to dictate the kind of film that the editor and director will finally craft at the end.
- Don't stop shooting: Hold your shots longer. This is the most obvious and simplest thing, but it speaks to the illusory nature of time. When you're shooting verité footage or footage of inserts or documentary coverage, you never hold your shot as long as you think you do.
- Videographers shouldn't show off. There are several things at play when shooting a scene. You want to light it for what the scene is supposed to convey (and this means different things for different types of productions), but you also have to be sensitive to accomplishing this in service of both the story and the budget. And when you talk about the budget, it's not just the number of units of light that you bring to a set and decide to use (or not use), it's also the time it takes to implement that setup.



LENA KATZ

Casting Producer / Location Manager
at Variable Content

Lena Katz's credits as a development producer, casting producer and locations manager include cable TV (WEtv, Revolt, HGTV) and digital-first productions (WhaleRock, mikeroweWORKS, Tastemade). She has worked directly for major brands, including Suzuki, Hormel and Brown-Forman. Learn more about her company, [Variable Content](#).



"Brands are coming to know they have more power, and that they can always go another route other than going with traditional big ad agencies. Smaller, scrappy and cost-effective production companies are producing campaigns for much lower total costs these days."



STORY FROM THE FIELD

I was casting a chef for a decent-sized project, and I found this guy Chris Cheung, who ran his own dim sum parlor, and emailed him. He was a really cool guy on email; and we liked him. He got picked over two rounds at 15 people per round – and got the Skype audition. Folks on the client’s social team and studio executives wanted to see his chemistry with the person appearing with him on camera.

On the day of the Skype audition, we were waiting; texting; someone at the client’s firm gave him the wrong link. Flustered, Chris dialed in, but we couldn’t see his face. He was in a supply closet for the whole call. All I could see was his ear and the side of his forehead. But he was such a nice

guy and had a dynamic personality, so engaging and funny. At the end of the call, he said to us: “Be my guest any time.”

We loved him; and even though we really didn’t know what his face looked like; it wasn’t based on a visual; it was his energy, and he did get the job.



TIPS FROM THEIR PLAYBOOK

Do's

- These days in casting, consumers want to see people who are relatable. People don't want people who look perfect; instead the public wants better representation across the board; more than one color, lifestyle, and age. Diversity in advertising definitely hasn't gone far enough yet, but brands are beginning to understand via social media that they can't ignore their customer-base. If they do, they will hear about it immediately. If you cast people that are authentic and cool, and representative of your customers, you'll be rewarded for it.
- Ambassadorships should be entered into with some due diligence. See which companies the potential person (athlete, actor, celebrity, influencer) has worked with before and get three testimonials. How did they do? It will tell you a lot.
- Locations managers need to make a production binder with: the location name, pictures, attributes, details about where it is; where the crew is staying; and where the location is to the next shot; and include all permits for location shooting.



TIPS FROM THEIR PLAYBOOK

Don'ts

- Don't brush past the details: A good location manager is a micromanager of details. She has a research-, rules-oriented mind; because in booking locations such as a city or county park, you'll need to get necessary permits and know the terms of what they allow.
- Don't be impatient if the location manager is asking: "What do we do if it rains? How many vehicles are you bringing? Where are the power supplies and outlets? What's the ambient noise?" They are thinking the right way. A location manager thinks ahead, anticipating problems, preparing for change – and they want to lessen your pain.
- Don't think because you've booked a site, the job is finished. Once you've decided on the location, the real work begins. You're best to scout the venue and all parts of it; confirm with proper contacts a day ahead of the shoot, and get it down in writing to the nth detail. Never assume you can use a location for free.



LUKE JOHNSON

Co-Founder of
Fulcrum Media

A media professional since 1999, Luke co-founded Fulcrum Media in 2013, a company with extensive experience in live-streaming emerging sports. A former elite Ultimate Frisbee player, Luke turned his knowledge of the game into a successful live-streaming program, helping to bring recognition and audiences to Ultimate's professional league. Follow Luke at [Fulcrum Media](#).



"Streaming is really easy. Going live is very easy, incredibly easy. But the ability to go live is not the problem: What's important is to tell a story that connects us to each other and know what's important to record. As humans, we are very good at seeing when something is inauthentic, when things don't have much value. So how to tell a story that engages or inspires is a whole other thing."



STORY FROM THE FIELD

In 2013, we were among the first companies to do live streaming. We were hired to live-stream professional Ultimate Frisbee games throughout the country, which then were mostly played in the Midwest on a high school football field or grassy parts in a city.

There were no box sets that let you plug-and-play back then. Instead, we combined different pieces of equipment to do all sorts of things: We needed multiple cameras, a switchboard, a scoreboard, a clock; and all of that had to sync with commentators, talking back and forth on camera, and off-camera to the crew.

We had two months and two weeks to figure all this out. We managed to

create a mobile system that fit into three racks and a rental van. We drove from city to city (Indianapolis, Toronto, Chicago, Madison, and D.C.) that first season, figuring out how to manage connectivity, power and vantage points, and adapting our gear to meet production needs when we arrived.

We felt that Ultimate Frisbee was exhilarating and exciting, but the fan base at the time topped at 2,000 viewers, so we had to find ways to make that audience grow. We got into early conversations with ESPN, and have grown the viewership to 60,000-80,000 now.



TIPS FROM THEIR PLAYBOOK

Do's

- Live video requires technical solutions that mean building a whole system – from multiple cameras to audio to re-play systems with a gold standard of 3-play, 4-play and 8-play. We built our entire system to meet the challenges of a mobile team. A small example is using a telephoto lens meant for still photography and having it adapted for video.
- In any type of live streaming, you have to emphasize why it's worth watching, and that means we have to go into the interior, to get to emotions. And in Ultimate Frisbee there is integrity – what some call “spirit,” an element of sportsmanship where the players themselves make their own calls – and that can affect the entire outcome of the game. So, when a player makes a call, I zoom in for a close-up. I emphasize it. We don't go to commercial or take a pause. We get close to their faces and show what integrity means, why sports and honesty matters.
- If there's an injury on the field or a lull in the game, I will cut to a pre-produced clip. I'll say: “Put up the video with Marcello Sanchez who serves at a low-income school.” We highlight players' stories with featurettes on why what they do matters, and we keep trying to connect people to the athlete and the sport itself.



TIPS FROM THEIR PLAYBOOK

Don'ts

- Don't forget the story. Facebook launched its Live Video in 2015, integrating live streaming for celebrities, and it was interesting to see people walk their dog. But once Live Video opened up to anyone, you saw an immense amount of video, and you ended up looking at less. Now we may go through a period when video is less important – and it becomes more important to have a higher level of intentionality of storytelling.
- There are more off-the-shelf, all-in-one packets for live streaming on the market now. The barrier to entry into live streaming is smaller; but a lot of that gear has limitations. Some won't give you the flexibility for specific production needs. Many aren't fully modular, and could be limited to four cameras. They won't do motion graphics, for example, or be able to take specific audio feeds.
- Don't forget that tending to sound and audio feeds are very important in live streaming. Pay attention to the little things: the crack of a bat; the footsteps of a person running; the sound of the crowds.

Documentation

THE WORDS AND WISDOM BEHIND YOUR VIDEO

“We need to be doing video,” says the CMO.

[Six months and \$50,000 later, having commissioned two new videos that garnered a grand total of 400 combined views.]

“THAT was not the video we should have done.”

It's an easy mistake, a common mistake, and a mistake that honestly doesn't need to happen. Any agency would agree.

Video campaigns used to be a domain solely occupied by advertising agencies. Video was produced in just a few formats: the big, expensive broadcast commercial spot; or the dry, information-packed industrial/corporate video; or of course the classically cheesy infomercial.

Then came the Web, then digital video platforms, then social media, and mobile-first... and then branded content became the imperative of all marketers. And now here we are with almost every brand nodding, “Yes, we need video,” but perhaps without much of a plan to execute.

Long gone are the days when brands would be bound to a big, pricey ad agency.

The content marketing landscape is changing so quickly that legacy agencies themselves can't keep up without specialized vendors and subcontractors. Knowing this, brands turn to social agencies, or production companies, or influencer content creators. Many brands have even allocated some of their budget to internally produced branded content. And kudos to them for taking back some of the control over voice and brand identity.

However, when it comes to fulfilling the vague yet pressing need to "create our own video," brands cannot allow any producer – whether it's the internal videographer or an influencer or an agency partner – to develop a video without multiple review

benchmarks. Before a single frame is shot, the entire project should be mapped out with specific documentation. The project manager or marketing exec needs to be able to request, review and approve each document.

Every production team has their own set of essential documents, but following are a few of the universally recognized docs that create a blueprint followed on set.

TREATMENT

A treatment is an in-depth creative pitch, most often used for unscripted videos, but sometimes for scripted TV pitches as well. A treatment usually will include:

- A synopsis,
- Potential on-camera personalities
- Sample episode overviews
- A section related to the brand's marketing objectives and target audience
- Mood board (optional)

Treatments in the old days were either inspired by or accompanied by collage-like "mood boards." Treatments are still very visually rich, and oftentimes contain mood boards if only for effect.

Treatments are a curious document, in that some development producers use them to suggest brand-new projects, and others only deliver them after initial research and production outlines are complete on an approved project. As long as you get the treatment before the script, either way is fine.

STORYBOARD

Storyboards are the cool, comic book-looking, more evolved siblings of mood boards. Or rather, these used to always look like graphic novels, and employ highly skilled visual artists to design them. Now, they often just use found images to anchor the text.

Storyboards provide a visual representation of the broad episode or video outline, and how it will be executed. Images are accompanied by detailed notes on:

- Key story points
- Potential locations
- Potential action
- Characters that may appear in scenes

CHARACTER BACKGROUND RESEARCH

Gleaned from extensive conversations with whomever may appear on camera, this is important source material for creating scripts and ancillary content. It may include:

- Biographical details
- Role and responsibilities in the company
- Personal anecdotes relevant to the campaign
- Information about the product or brand the person works on

This documentation will be used to create scenes, interview questions and talking points. A lot of it won't go into the script, but will still be kept as important backup documentation that everyone from the director to the project manager to the publicist is able to review, and pull ideas from, or flag certain things that should not go into the video.

Corporate production professionals often do background research on people in the company who who will not necessarily appear on camera. The general thought is, when creating the story of a brand, the people with firsthand knowledge and experience are the most important sources.

SHOT LIST

A shot list is a grid/spreadsheet detailing each shot the camera team will need to cover during production. For each shot, the spreadsheet has columns for:

- Shot type (framing)
- Location
- Shot description
- Characters in shot
- Associated dialogue

Generally, the creative director or the director who will be DP (directory of photography) on set comes up with this document, with the assistance/oversight of the producer or production manager.

TALKING POINTS

Many non-actors are uncomfortable memorizing lines and delivering them on camera. Even professional on-camera talent (hosts, experts, celebrities) sometimes feel more comfortable semi-improvising their lines, provided they've been coached well on the material first.

Talking points provide a mid-point solution between total improvisation and memorized lines. They are cues or thought-starters around which a person can frame their lines on-camera. Talking points are essential to have documented before a shoot so that the talent can feel prepared, the director can be aware of crucial soundbites, and the project manager can make sure all essential story points are articulated during the shoot.

Talking points can be included in a script, but they often are created as individual documents so that specific characters can study them ahead of time, or so that executives/legal can review and make sure messaging is on brand.

SHOOTING SCRIPT

The multi-column script is what the director/DP and line producer will follow on set. It breaks down each scene. Columns will detail:

- Shots – specific action
- Characters in each shot
- Dialogue or text
- Other audio
- Props

There is crossover between this document and a shot list. However, many executive producers and creative directors like to have both, because the shot list only is a guideline for the camera team, while the shooting script is the guideline for the on-camera talent, the sound person, and the line producer as well as anyone in charge of props.

While many directors like to go off-script as the creative mood takes over, the general motto among production veterans is that shooting scripts keep the production on the rails. Therefore, a project manager is within their rights to request a copy of the document after final approval – and if you see during the shoot that the director is going off the approved script and the line producer looks nervous, don't be shy about asking what's happening.

DOCUMENTED PLANNING KEEPS YOUR PROJECT ON TRACK

Overall, don't be shy. As a project manager, brand manager, marketing exec or general client, you're ultimately responsible for the budget, output and ROI of the video project. Don't set yourself up for surprise and blame-trading when the first edit is unveiled. Instead, find out which of these documents, or similar documents, will be created during development and pre-production, and make sure you get them to review and approve before moving forward toward production.

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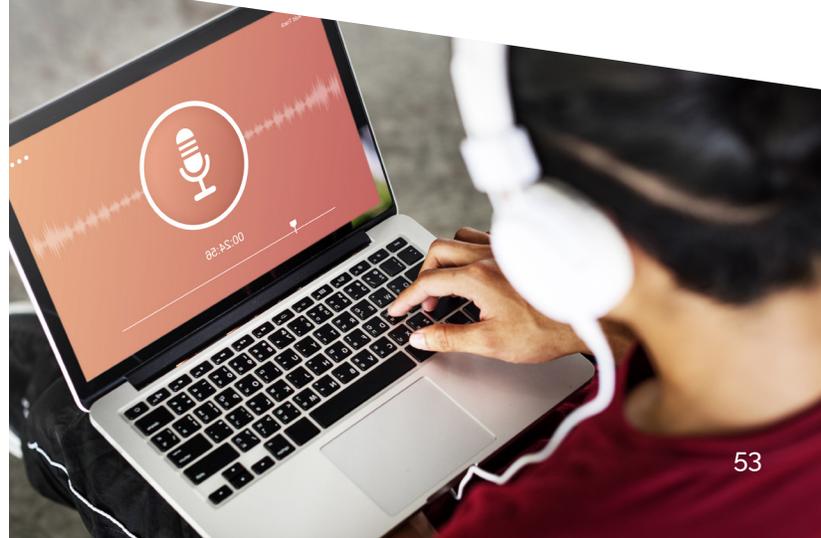


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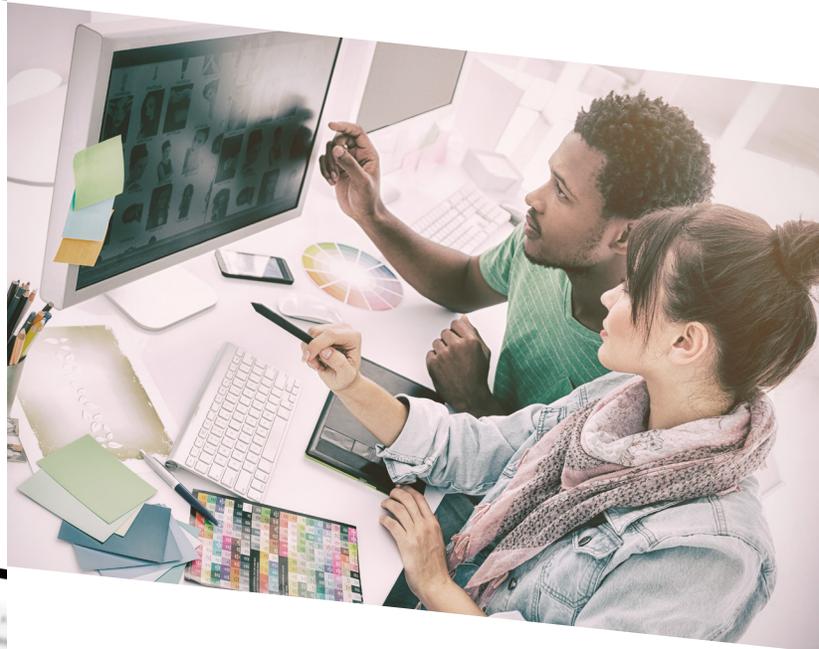


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CONCLUSION

Given the advice highlighted by experts in this ebook, brands thinking about creating video content should prepare systems that accommodate the production process and also track and monitor the public's responses once videos are launched or go "live."

Asif Ahmed makes the point that companies experimenting with live video need to think through their processes of approving content well ahead of events and marketing launches. That way, when content goes live, production professionals have the clearance needed from the company's leadership and can strike the right balance between their creative license and the company's message.

The nature of live streaming is that brands in some respects must relinquish control, allowing what happens live to be its public image during that precious air time. That said, video content creators and companies will have to share responsibility for crafting authentic experiences, while also making sure to hone the message in ways that promote their brand. Considerations for the public and its sensitivities always need to be taken into account when making marketing content. As audiences become more specific, greater attention to context goes a long way.

As Lena Katz says, "Giant brands have to be sensitive. You see how Kendall Jenner's commercial for Pepsi was, at its core, a misguided direction, and it completely backfired. Brands are becoming more aware. They are going to need to be more flexible, agile and responsive to the public."

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