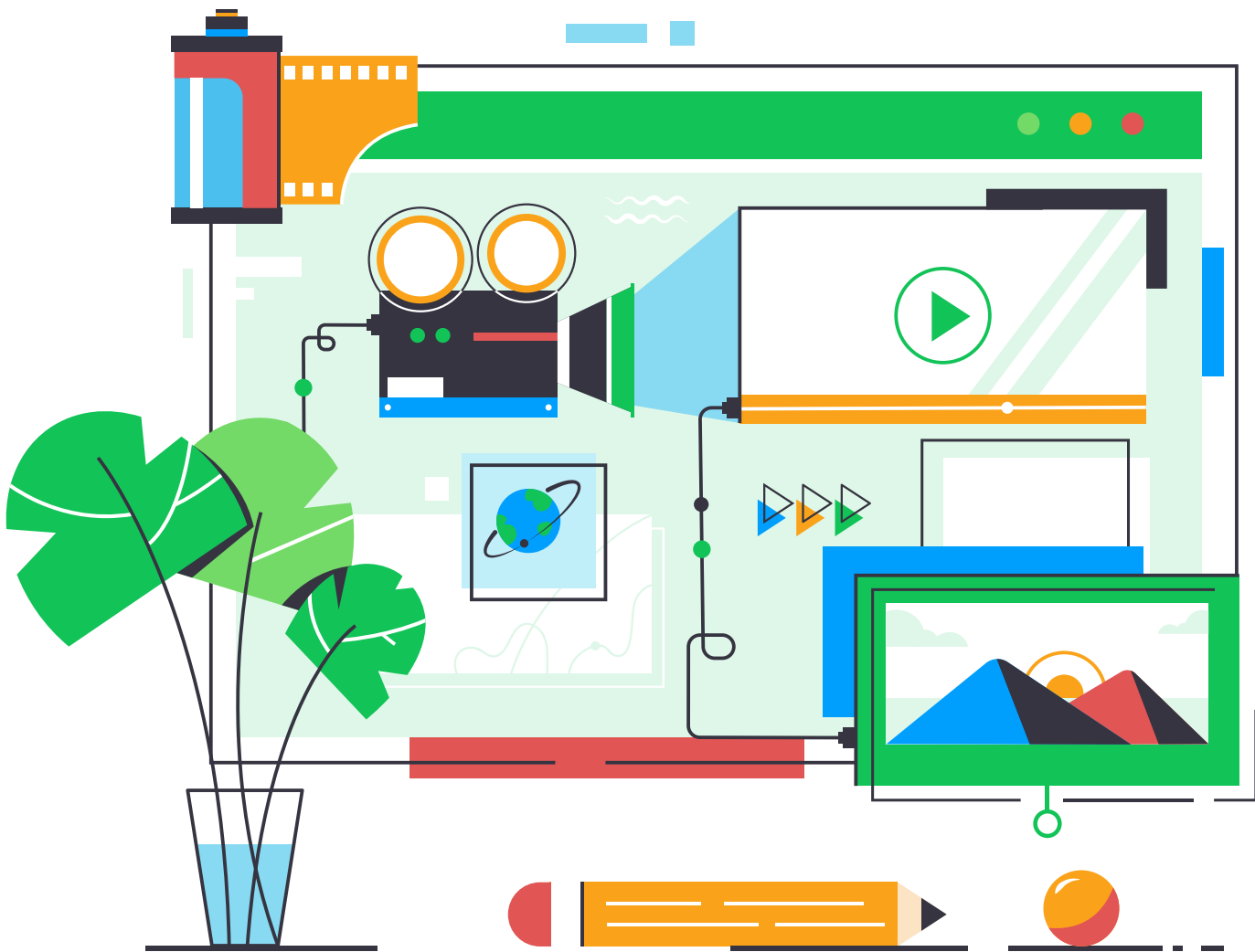


The Beginner's Guide to Making a Training Video



About the Author

Dan Keckan is CEO at Cinécraft Productions, a custom content learning company that has called Cleveland, Ohio home since 1939. After joining his family business in 1998, he began rebranding the company from a local training video company, to an international custom content learning company. He works with organizations to design and develop learning strategies, and provides thought leadership that achieves measurable business results. His expertise is in matching learning modalities to the actual skill or behavior to be learned. You can often find him at learning conferences speaking on simulation design best-practices and presenting award-winning

work. He resides in Rocky River, Ohio with his wife, Kate, and their two children, Mackenna (6) and William (4). Dan is also an avid Cleveland sports and Ohio State Buckeyes fan.



About Cinécraft Productions

Cinécraft boasts a creative and award-winning staff of 25 employees and dozens more freelancers, including instructional designers, scriptwriters, video editors, project managers, animators, graphic designers & developers. Cinécraft's team of learning professionals works to ensure Cinécraft's customer list of Fortune 1000 organizations are happy with the results, learners enjoy learning. and everyone has fun in the process.

Introduction



Video is a powerful training tool, but developing good training videos is not as easy as pointing your smartphone and pressing record. Just as any other training project, there is a process to follow so you don't fall into a rabbit hole of revisions and retakes.

You also need to apply good instructional design practices to make sure your training video is effective. If your video does not resonate with learners, then it does not matter how much you spend on production; your video will not achieve the desired results.

In this eBook, I draw on my decades of training video production experience to break down the process and remove the curtain of mystic. I will provide you with the knowledge and tools to plan, write, and produce a professional and effective training video.

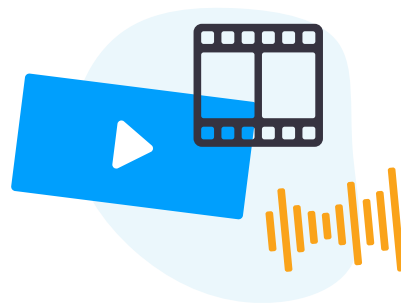
- You'll learn how to develop a Learning Strategy, so your video focuses on the right information.
- You'll receive guidance in all the pre-production steps from writing the script to managing a video project to planning your production crew and budget.

- You'll discover tips on making your training video look and sound professional.
- Finally, you'll learn the steps necessary to put your training video together, distribute it, and evaluate the learning.

This eBook is divided into four main parts



I'll walk you through each step within these four parts and provide useful tips so you can produce effective, professional-quality training videos.



What is Video?

Video is defined as a series of images that create motion, hence the term motion picture. It is made up of frames or images that create movement when combined. A typical video is measured by 30 frames per second. However, you can have less or more depending on the quality of the picture you desire, or requirements based on IT restrictions (more on that later).

I do need to expand on this definition of video because software such as Camtasia, PowerPoint, Captivate, and Storyline have blurred the lines. Not to mention animation! Technically, these modalities do create motion.

However, for our purposes in this eBook, **video is a content object of moving images that tells a story and is identifiable by a filename like MP4, MOV, or AVI, among others.**

Types of Training Videos

If a division vice president says, “We need a training video,” what do you do first?

Ask questions, of course!

- ➔ What does she want the video to accomplish?
- ➔ Who is the audience?
- ➔ What does she want the audience to DO after watching it?
- ➔ Most importantly, why does she assume that video is the best medium for this training need?

Based on the answers you receive, you can identify the type of training video that best suits the learning need. Here are three types of video that you can choose from that will enhance the learning experience.

1 ***Demonstrative Modeling or “How-to” Video*** Authentically demonstrate the skills or behaviors to be learned.

This is a great type of video to use as a support tool for learners who require revised or updated information on a skill or behavior with which they are already familiar. For example, an appliance technician who needs to know how to troubleshoot a newer model of dishwasher.

It is also a beneficial video type to use in blended learning for learners who are completely new to a skill or behavior. They would benefit from seeing the behavior or skill performed before trying it. For example, a person has never conducted an interview, they could watch a demonstrative video of how to conduct an interview and then practice the skills through role plays in a classroom or through a video-based simulation.

2

Video-based Simulation

Authentically give the learner control to demonstrate the skills or behaviors to be learned.

Using video-based simulations provides learners with a safe environment to practice a skill or behavior before trying it in the real world. For example, when implementing a new enterprise software, a video-based simulation allows learners to practice entering information and running reports without the fear of unintentionally altering important data.

3

Awareness Video

Creatively articulate knowledge-based content to give the learner context and a general understanding. Typically, this is not measurable and therefore, should be viewed as awareness and not learning.

An awareness video is a good choice if learners simply need to know or understand information. For example, it is a good idea to provide a new hire with an awareness of company history. However, there is no measurable business outcome tied to a new hire reciting that Bill Johnson was the third president of Acme Towel Distributors in 1956.

Understand the Phases of Production

Finally, the last thing you need to know before we jump into creating a training video is the phases of training video production.

There are four phases:



I cover each of these phases in the rest of this eBook, but a high-level understanding will help you see how they relate to each other.

A creative brief or learning strategy is the blueprint for your training video, and is based on a thorough needs analysis. It articulates the business need, identifies the learning objectives that will satisfy the business need, and illustrates how you will creatively accomplish the training video goals.

Pre-production consists of tasks to complete before recording video. These tasks include scriptwriting, talent selection, and location scouting.

Production is when you create assets such as video, music, sound effects, graphics, photographs, and voice-over narration.

Finally, **post-production** is when you assemble all the assets you created into a final training video. This includes editing and implementation.

Now that you have some context related to training videos, let's jump right into the process.

Phase 1:

Creative Brief / Learning Strategy



Remember the creative brief / learning strategy (sometimes called a design document) is your blueprint for the entire training video. It is a document that summarizes the project's business needs and explains how the video addresses those needs through learning objectives and a content outline.

The brief should contain answers to these questions:

- What is the business problem to solve?
- What are the key performance indicators to achieve?
- Who is the target audience?
- What are the learner personas?
- What are the actionable, measurable, and specific learning objectives?
- How will the story be told – characters, setting, story arc?
- What is the modality that best achieves the goals? (i.e. type of training video)
- Who is the target audience?
- Why does the audience care?
- Where and how will the video be distributed? (i.e. YouTube, LMS, intranet)
- What is the preliminary budget?
- When is the completed training video due?

Once the above questions have been answered, you are ready to add the content outline. The content outline contains the main points to cover with supporting details underneath. This is important to provide a flow and organization of information before the script is written or filming starts.

First, review the source material and notes from your discovery conversations, and then write the key topics you want to cover. The key topics should align with your learning objectives. Organize the key topics in a fashion that makes sense based on the learners' job tasks.

Let's look at an example of a dishwasher installation how-to video:

The following learning objectives are for first-time dishwasher installers.

- ➔ Remove an existing dishwasher and prepare the opening for dishwasher installation.
- ➔ Install a model XYZ dishwasher according to manufacturer specifications.
- ➔ Test a model XYZ dishwasher.
- ➔ Troubleshoot and resolve common issues with the model XYZ dishwasher.

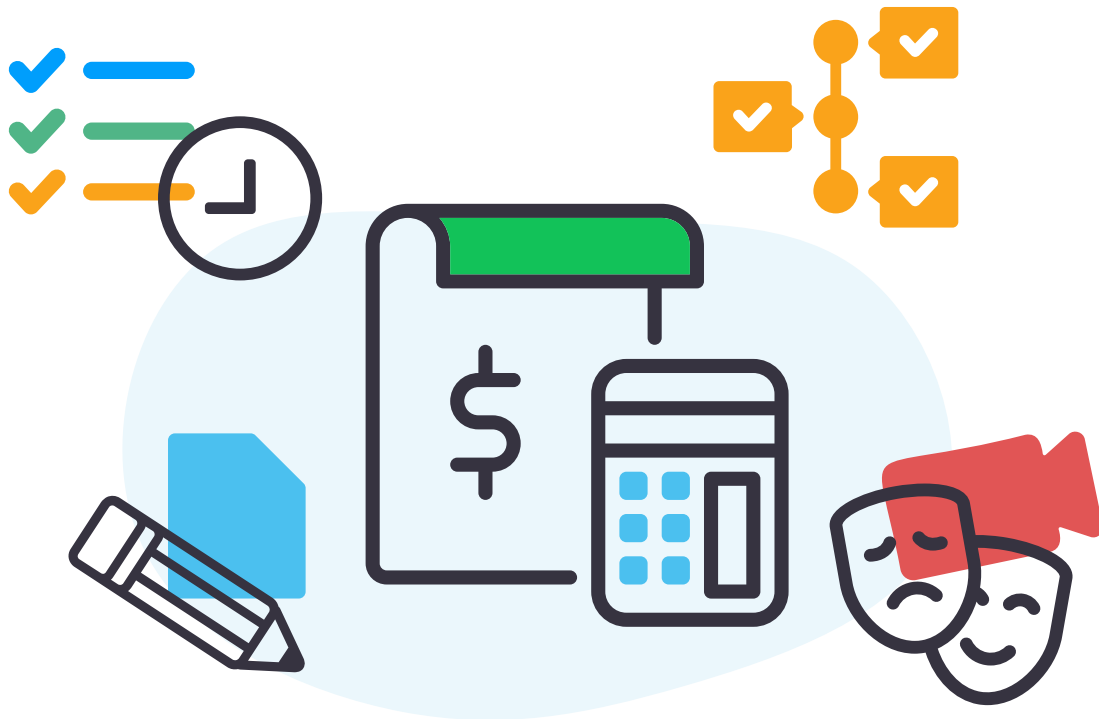
Depending on the amount of detail you need to include for each topic and the needs of the learner, you can make one long video or create a separate video for each topic. For example, if the learner will use the training videos as a reference on the job, you should create short, separate videos for easier access.

Now begin to break down each key topic. For example, what are the steps for removing a dishwasher? What are the steps for testing and operating the dishwasher? How many “common issues” do installers run into, and what are the steps to troubleshoot each one?

Lastly, make sure the outline for each topic has a clear beginning, middle, and end. Like the courses you write, a video script should briefly introduce the topic that's going to be covered before moving into the details, and eventually summarize the main points in the conclusion.

Your creative brief / learning strategy is done. It is a key component to creating an effective training video. Take adequate time to develop it and get the stakeholders' approval before continuing to the next phases. This will save you time, money, and frustration. However, once it is approved, do not set it aside. Throughout the training video project, refer to the creative brief / learning strategy to make sure the script and filming meet all the needs answered in the questions and follow the outline.

Phase 2: Pre-Production



The pre-production phase of creating a training video includes the tasks and actions that happen before you shoot video or create assets. Here's a link to a [Pre-Production Checklist](#) to help during your next training video project.

Determine Production Roles

Figuring out what production roles you need determines how many people need to be involved and ultimately affects the budget. This is a good gauge to immediately determine if there are any changes you need to make to remain within your project budget.

Start by establishing your personal role or roles within the project, and then plan out the production roles for the rest of your team. For example, if you act as the producer, you need to organize the production and act as a project manager. Other roles for which you may also be responsible include script writer or director.

When I select my production team, I try to match an individual's skill set to the content being delivered. For instance, if the content is technical in nature, then I assign a scriptwriter who has experience writing technical scripts. Conversely, if the learning strategy requires a high degree of creativity, I assign a scriptwriter who has experience writing marketing-friendly copy.

I've created a [video roles](#) quick reference guide (QRG) to help you assign training video production roles. It identifies 18 types of roles that people play during a production. The guide provides a short definition of roles, aliases, and a range of rates you may expect to pay. Keep in mind, some people may play more than one role. More than likely you will not need all of these production roles for your video, but it's good to know the resources that may be available to you and the associated budget.



Finalize Your Budget

When I put a budget together, I look at the time it takes each production role or professional to complete their tasks. How do I calculate the number of hours needed for each production role to do an effective job? First, I ask my production team members. They have the experience for their role and can provide an accurate estimate of hours by reviewing the creative brief/learning strategy.

Next, I ask the production team questions to further refine the hours.

Some questions I ask are:

- How many hours will it take to write the script?
- Can we shoot in a ½ day, a full day, 3 days, or a week? Every time you set up lights and camera it takes approximately 45 minutes, therefore, you should be able to accomplish 6-7 setups in a 10-hour day.
- How long will it take to edit?

- What type of talent do we need? i.e. voiceover, on-camera spokesperson, dialogue
- How many different talents do we need?
- How long will it take to create a design based on the customer's style guide and our creative strategy?
- How much animation is needed, and do we want 2D or 3D?
- Will the video need to be programmed into an eLearning authoring tool? If so, how much time will that take?
- Do you need 508 or WCAG compliance for accessibility?
- Do you need to translate the training video in additional languages?

Lastly, make sure to add sufficient time into each phase for 2-3 rounds of revisions.

Once you have determined the hours, you can plug the numbers into your rate sheet to determine a final video budget. It's a good idea to allow yourself a contingency budget of 10-20% for additional material costs. Some of these costs may include props, set elements, wardrobe, and additional stylized motion equipment like a jib arm, steadicam, dolly, or drone.

Hold a Kick-off Meeting

The kick-off meeting is the launch of your project where the key players assemble virtually or in-person to discuss expectations, logistics, and the direction of the training video. The key players include your production team, stakeholders, and subject matter experts (SME's). If you hire an outside vendor for a production role then they should also be present at the meeting.



Following are key discussion points to include in your kick-off meeting agenda:

- Review the creative brief / learning strategy to ensure nothing has changed
- Discuss project timeline (due dates, tasks, roles)
- Consider script content (narrated, animation, live action)
- Determine talent needs (professional or in-house)
- Identify who will be involved in reviews and approvals
- Select video recording locations
- Determine design style by identifying a resource in marketing for the style guide or brand guidelines. The “look and feel” need to be aligned with the corporate brand guidelines.
- Establish communication plan: Weekly virtual meetings are recommended to keep on-point with the message, budget, and timeline

Create a Project Timeline

During your kick-off meeting you should establish several dates that define your project timeline. Start with your deadline and work backwards. During review cycles, allow time to accommodate team members' schedules, the number of team members, and the volume of content in the training video. A best practice for review cycles should include 1 day for a peer to provide a quality assurance review and an additional 3-5 days for all stakeholders and SME's to provide their input.

Here is a [project timeline template](#) to help you get started.



Write a Script

No matter what kind of training video you make, you need a script. If the creative brief/learning strategy is the blueprint, then the script is the foundation. It does not simply provide the talent with the words to recite. It's what guides the entire production team throughout the project!

Script Skeleton

Review the outline created in the creative brief/learning strategy. Think about what your audience will hear and see. Before delving into writing a bunch of dialogue, start by using a script skeleton or template to create your story.

In the example, the far left is the index numbering system. The index number helps break up the script into manageable bites of content representative of a complete thought. Furthermore, if your talent reads the index number for each complete thought it will aid the editor in the post-production process.

Index	Video	Audio
1	B-Roll WS: Installer measuring the width, height, and depth of the existing dishwasher. Sfx: Natural Sound	VO: First, make sure the new dishwasher will fit in the opening. Measure the width, height, and depth of the existing dishwasher.
2	CU: of installer's hands removing the dishwasher kickplate and inspecting with a flashlight. Sfx: Natural Sound	VO: Next, remove the kickplate and inspect under the dishwasher with a flashlight.

The paradox of this layout is where you begin development of the script. I recommend beginning with the audio column on the far-right. This column is your story, your content, and the heart of your script.

The visual column supports the story. If you don't have a story, then you don't have visuals to support.

Finally, expect a lot of revisions so don't include the index numbers until the script is 100% approved and you're ready for production.

Script Abbreviations

As you may have noticed in the script skeleton example, there are abbreviations used that are not commonly known. Here is a short list of some of the more widely used abbreviations that you'll need for visual direction:

- **OC:** On-camera talent
- **VO:** Voice-over narration
- **GFX:** Graphic effects
- **2D:** 2-Dimensional animation
- **3D:** 3-Dimensional animation
- **FX:** Video effects
- **SFX:** Sound effects
- **TOS:** Text on screen
- **Nat Sound:** Natural sound

The language you use for camera angles is also important. A similar list of commonly used camera angle abbreviations is compiled below.

- **B-Roll:** Video that supports the voice
- **CU:** Close up
- **WS:** Wide shot
- **MS:** Medium shot
- **INT:** Interior shot
- **EXT:** Exterior shot
- **POV 1:** 1st person point-of-view
- **OTS:** Over the shoulder

Script and Visual Direction Tips

What you see in your mind is not always obvious to the producer/director, videographer, or editor. These are the people who bring your content to life, so it is important for you to clearly convey your vision in the script.

Think about how they will frame each shot, the background or location, what your talent (the person on camera) is wearing, graphics/animation, and the transitions between different scenes. Likewise, consider if you want to use background music and sound effects, and what the pacing and tone of your narrator's voice will be.

Below are examples of how to organize and format your visual storytelling.

Video Simulation Example

Index	Video	Audio
1	<p>POV 1: Inside a retail paint store with a wood stain product display.</p> <p>A male customer in his 50-60s walks into the frame. He looks frustrated.</p>	<p>VO: You've just come back from lunch and you see a frequent customer looking around the interior stain display. You say, "Hey Bob, good to see you. What can I help you with today?"</p> <p>OC:</p> <p>Bob: Yeah, can you tell me where the Supreme wood stain is?</p>

Animated History Video Example

Index	Video	Audio
1	<p>TOS: Company Logo and Title</p> <p>MUSIC: Building - Upbeat</p> <p>GFX: Animated timeline with text, graphics, and photos highlighting events in the company's history. The text, graphics, photos will fly by as the voice-over is read.</p> <p>Events:</p> <p>1947 - Company A is founded</p> <p>1958 - Launch of product XYZ</p> <p>1969 - Launch of product DEF</p> <p>1987 - Company A acquires Company B</p> <p>1997 - Company A acquires Company C</p> <p>2004 - New center for Innovation is built</p>	<p>VO: Welcome to the first module of the Sales Team Training - Sealants Course.</p> <p>We've been developing sealant technologies since we were founded in 1947.</p> <p>Since then, we have seen many product launches... ...a steady flow of innovations... ...and strategic acquisitions.</p> <p>Today we continue to develop new ideas with our center for innovation.</p>

When you're considering which shot types (wide shot, medium shot, close-up) to use, ask yourself, "What does the learner need to see to get the best context?" For example, if you show two people having a conversation, you'll want a mix of medium and close-up shots to capture their non-verbal cues.

Another example is using a variety of close-up (CU) shots to show hand movements or other details to demonstrate a value of importance to the learner. Another common shot sequence is to alternate between over-the-shoulder (OTS) shots of two people having a conversation.

If you've never written a video script before, or if you're having trouble with this step, review the script with your videographer and/or editor. They can help you clarify your shot descriptions and camera movements.



WIDE SHOT (WS)



MEDIUM SHOT (MS)



CLOSE-UP (CU)

There are many more shot options for your videographer. If you'd like to see more examples, [here is a useful article about shot types](#) from B&H Photo.

Next, I'll share some script writing tips for different types of videos.



Behavioral Modeling Tip

A key to behavioral modeling video is to show, not tell. Instead of using narration to describe how to properly greet a customer, simply say, “Let’s watch how to properly greet a customer,” and then show the conversation. Let the dialogue model the behaviors. This reduces the length of your video and keeps it relevant and authentic.

How-to Video Tip

Conversely, a key to a demonstrative how-to video is to show *and* tell. Use the visual to demonstrate how to perform each skill-based step while voice-over narration describes the steps. For instance, if you want learners to be able to install a flux capacitor into the electrical system of a car and achieve 1.21 gigawatts of power, you need to describe the actions and the reasons for the actions with voice-over narration as the actions are performed on-screen. This helps to reinforce the content and describe the “why” in addition to the “how.”



Dialogue Tips

Alfred Hitchcock once said, “A good story is life with the dull bits cut out.” This statement couldn’t be more true when it comes to a training video. Reflect on your learning objectives and stick to the information necessary to create an authentic experience as well as an efficient one. This means leaving out the content that is nice-to-know versus need-to-know. This is an exercise you need to engage in with your SME and stakeholders. Often SMEs and stakeholders want to share as much information as possible, believing “more is better.” This may be a challenging conversation for you. Take a deep breath and rely on your instructional design knowledge, the desired business outcomes, and the learners’ needs as a guide for the conversation.

Another dialogue tip to better engage your learners is to use an authentic, conversational tone. This may require you to ditch the grammar book. (Don’t worry. I’m not callin’ the grammar police.) Most people don’t speak with perfect grammar in everyday conversations, so they will better relate to dialogue that is more like they speak. Use contractions and simple word choices such as “save more money” instead of “fiscally responsible.” Finally, don’t be afraid to use sentence fragments. They are a staple of an authentic, conversational tone.

More Writing Tips

A few additional variables to keep in mind when writing your script is your organization's branding, culture, values, and legal & compliance. Executing your writing effectively based on these variables will avoid time-consuming changes during the review process.

The following example underlines the importance for making Legal happy during the review process: “The XYZ dishwasher is so durable, it will work for at least 10 years before having to replace a single part.” While this statement may make any marketing department happy, it describes benefits that can lead to potential litigation due to false claims about your product. A better statement is: “The XYZ dishwasher is durable, giving our customers peace-of-mind they made the right choice in their new dishwasher.”

Send the Script for Review

Even though this is not actual writing, having a team review the script is an important part of the process. It ensures your content is accurate and that you have buy-in before proceeding to shooting the training video. Getting buy-in and approval on the final script before production helps you avoid costly re-shoots or additional voiceover recording sessions.

You should make sure that you have identified all of the people who need to approve the video and have them perform a review. This includes, but is not limited to SMEs, stakeholders, Communications, and Legal. Identifying all reviewers should have occurred prior to the kick-off meeting, but it doesn't hurt to make sure things haven't changed once the script is ready for review.



Select Talent

Depending on your script, you may need voice-over narration or on-camera talent. There are many talent agencies in your city, online, and possibly in your own company. Before selecting talent, make sure you have discussions with your stakeholders for their preferences in terms of ethnicity, age, and gender. When it comes to voice-over narration, you should also ask if they prefer an authoritative or conversational tone.

If you choose to work with a talent agency, send them a page of the script and ask for auditions from several actors. Likewise, if you choose to use your own company employees, set up a camera and ask them to read from the script. Some people tend to freeze-up on camera, so you want to weed them out before your shoot day.

Prepare to Shoot

You have the script and you have your talent. Hold up! It's not quite time to shoot the training video. There are a few more steps. This may seem like a lot of preparation, but it is worth it. The following steps ensure that you shoot a professional and efficient video. They help remove confusion, frustration, and needless repetition.

Create a Shot List

Now that your script is approved and ready for production, the next step is to make a shot list. Similar to a script, a shot list is broken into 4 columns:

→ **Shot Number** → **Shot Type** → **Move** → **Description**

Let's start with the shot number. This correlates to the Index number in the script. Most people think you film a video in the order of the script. Unfortunately, that may lead to a very inefficient and costly video recording process. Using the training video shot list template, you can plan the order of the shots to be filmed by adding the Index numbers into the Shot Number column in the order to be shot.

Be mindful of content that needs to be shot in sequence. If the content doesn't need to be shot in sequence, then plan the shot with the goal of making your shoot day more efficient. Every time you set up lights and gear it takes time. It can take 30-45 minutes for a professional video crew, so leave yourself at least that amount of time for each setup. Remember when we set the budget, time translates into money. Therefore, organize the shots by grouping together those that can use the same set.

Once you have the order of the shots, you are ready to complete the [shot list](#). The Shot Types are the shot angle descriptors like wide, medium, and close-up shots that should be identified in the script. In the Move column, indicate whether the camera move should be static, pan (horizontal), tilt (vertical) or handheld. You can also use this column to identify any additional equipment used like, drone, jib arm or dolly. Finally, use the Description column to identify what the subject should be doing.

Here is an example of what your shot list should look like:

27	Setup 2			NINA: [VO & Text on screen] Remember she's a Browser customer, what should you say next BROWSER: (smiles) Oh, thanks – nothing, I'm really just looking.
TITLE: ACE Browser Sim		LOCATION: Model Store – Chicago, IL		FEEDBACK Video:
#	TYPE	MOVE	DESCRIPTION	
26	WS	Static	BROWSER: (video) enters screen, approaches camera and waits	
26a	MS	Static	BROWSER: (video) smiles Oh, thanks – nothing, I'm really just looking.	
26b	WS	Static	BROWSER (video) waves at camera and walks off screen	
27a	MS	Static	BROWSER: (video) shaking her head - I'm just looking okay! I don't need any help. - walks off camera	
27c	MS	Static	BROWSER: (video) shrugs - I don't know. Depends on what I might find. - walks off camera	
28	WS	PAN	BROWSER: (video) in the aisle looking at a product	
29	MS	Static	BROWSER: (video) shaking her head, despondent - I have dandelions and I need the BEST stuff to kill them.	
				BROWSER: (shrugs) I don't know. Depends on what I might find. (walks off camera)

Scout Your Locations

I strongly recommend doing an inspection of your planned shooting locations before the day of the shoot. Look for electricity access, audio levels, size of the area, and lighting considerations. Here are a few specifics to consider in your location:

- ➔ If you plan to have proper lighting, and I recommend that you do, make sure you have adequate electric coverage for your lights.
- ➔ Make sure that the location you're planning to use doesn't have too much or too little light.
- ➔ Check the noise level where you will shoot. Plan around loud air handling systems, machines, or traffic.
- ➔ Discuss how your shoot may affect employees' productivity at the location.

While you are at the location, capture some pictures to share with any team members that can't be present during the scout.

Create a Call Sheet

Similar to a shot list, the [call sheet](#) is an organized document that shares details of the shoot day or days with everyone involved in the production. It includes report times, location addresses, plans for meals, shot lists, wardrobe requirements, prop lists, and all relevant contact information for team members.

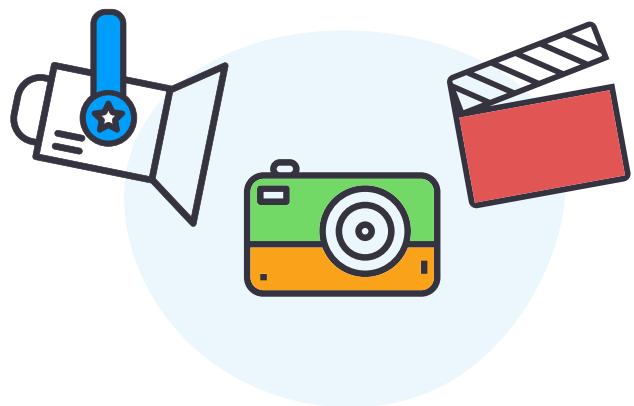
Secure All Permissions

As the person managing the production, you are ultimately responsible if something goes wrong. Make sure you are insured or that the party you've hired has insurance to cover the team during production. Obtain signed release forms from anyone appearing in the video. If you are recording during business hours, make sure that you've obtained permission to use the space. Also, if you need access to a computer make sure that you have the proper network credentials.

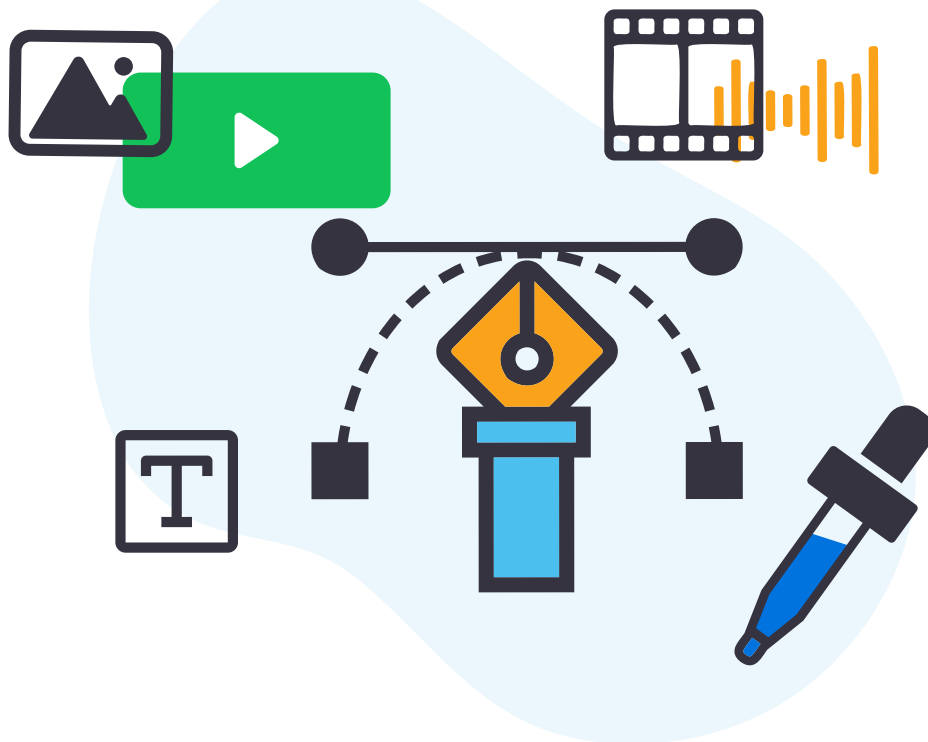
At the conclusion of pre-production, your team will be well prepared for shooting the training video. Make sure everyone has physical copies of the following documents:

- Approved Final Script
- Shot list
- Call sheet

Now it's time for lights, camera, and action!



Phase 3: Production



Simply put, production is when you begin to create the assets to bring your script to life. Depending on your creative brief/learning strategy, production may include raw video, photographs, voice over narration, music, and 2D and 3D animation.

The Following are a few Pro-Tips to Get you Ready for a Great Video Shoot.

- ➔ **Respect the Location** - First and above-all else, kindness goes a long way in a professional setting. Always ask for permission and be apologetic if you interfere with someone's workday. Take special care of exits and your surroundings. Avoid blocking main walkways or creating tripping hazards with your gear. Leave no trace! Clean up after you finish your shoot day... as if you were never there.
- ➔ **Have Makeup Ready** - Always have a makeup kit packed with powder, cover-up, comb/brush, hairspray, scissors, and nail clippers. High definition video highlights the tiniest of imperfections. Be ready for a quick fix by having a few beauty and grooming items on hand.
- ➔ **Props and Wardrobe Ready** - Waiting for props can be a frustrating and a time-consuming effort on your shoot day. Therefore, organize props for your shoot prior to the shoot day. If someone else is responsible for props, contact them ahead of time and make sure they are ready. Finally, if you've asked talent to bring a specific wardrobe, make sure they bring a few alternate options and that they are wrinkle-free.
- ➔ **Collaborate with Your Videographer** - Talk with your videographer early and often to make sure you both share the same vision of each shot. The videographer or DP, director of photography, is typically the person operating the main camera on a shoot. This person is responsible for making decisions about the positioning of your subject, the lighting of each scene, camera angles, and any camera movement.

Video Recording

After you have everything ready and organized, it's time to start recording video! Let's start with shooting your raw footage.

Make Your Shots Professional

Your video's professional appearance is highly dependent on how well each scene is lit. Pay close attention to how the lighting creates shadows and how it highlights your subject's on-camera appearance. The shadows should have soft edges and the light should not be too bright (hot) on the subject. Lighting is one of the most important production values that separates an amateur video from a professional video.

The most common lighting technique is 3-point lighting and includes a key light, fill light, and back light. The key light is generally your brightest light and is placed on the left side of the subject. A fill light is added to the right side of the subject to balance the key light. Finally, the back light is used to highlight the hair and separate the subject from the backdrop.

Following are images that illustrate the benefits of the 3-point lighting technique.



Make Your Audio Professional

Always monitor the audio you are recording. Designate a person to listen with a pair of headphones to make sure the quality is consistent and that the mic is not picking up unwanted sounds. In a training video, good audio is just as important as the lighting.

I recommend using a shotgun microphone that plugs directly into your professional camera with an XLR cable. You can also use a field recorder if you cannot plug directly into your camera. Another option to capture audio is with a lavalier microphone that clips to the talent's clothing. I recommend this option if the environment is noisy. However, be mindful that a lavalier may pick up the rustling of clothing.

Pay close attention to where you put the microphone. You want to make sure that you pick up the audio at an appropriate level. For example, a shotgun mic must be pointed right at the mouth of the person you are recording.

As you monitor the audio, pay attention to the levels. Audio that is recorded too low sounds fuzzy or crackly if it is made louder in post-production editing. Conversely, audio that is recorded too loud may sound exceptionally distorted.

Make Sure the Red Light is On

Sounds silly, right? However, even the best trained professionals sometimes forget to press record on the camera. And, you know Murphy's Law will make sure that when you forget to press record, you'll miss the best take of the day! To avoid this tragedy, the DP and the director should verify that the camera is recording. The DP should confirm that the timecode is counting up and the red light is on. He will then say "Speed," which indicates that the camera is recording. The director should check the video monitor to make sure the timecode is counting up and that the red circle appears on the monitor. When the director is ready he can finally say, "Action!"

Make Changes During the Shoot

A great way to make your editor's time more efficient is to actively mark up the script and shot list as the shoot day progresses.

If the copy changes during production, write it down and cross out the old copy.

If there are multiple takes, make a note of which one is the best. If possible, try to denote the timecode where the talent said the line perfectly. Along with marking up the script, check off each shot on the shot list so that you don't forget anything.

Finally, give a copy of your marked-up script to the editor along with the video files.

Watch the Action

Are you starting to appreciate why you should have a production team? It's a lot to balance – marking up the script, listening to audio quality, checking lighting. And we aren't done yet!

You also need to watch the composition. When you're watching the action, make sure the videographer has good picture composition. Fortunately, there is an easy rule to help with good composition to get you started: the "Rule of Thirds."

The "Rule of Thirds" states that a photographer or videographer should line up the screen like a tic-tac-toe board dividing it into nine equal quadrants that obviously have four intersecting lines. The focus of your content should be at those "points of interest" or intersections. This demonstrates great composition and makes your shot aesthetically pleasing to the viewer whether it's a wide, medium, or close-up shot. It's also important to note that while the "Rule of Thirds" is stated as a "rule," it is not an "end all, be all" solution. However, it is a strong starting point.





Backup Your Files

Technology can fail, and human error often prevails. The last thing you want is to find out all of your hard work mysteriously vanished from the hard drive. After you capture your video, backup your files to at least two locations before you go home for the night. A portable, external hard drive and a storage server are two great options.

Make sure the editor is ready to import the files to the editing computer as soon as possible to reduce the opportunity for lost or deleted files by team members cleaning up hard drives for more space.

You may be thinking that two or more locations is overkill. Remember that video files are computer data, and technology does fail. I've had portable hard drives and local hard drives fail. My server has even failed. However, I've never had more than one fail during a single project. Knock on wood.



Voice-over Narration

We're not quite done yet with production. You have the video, but now you need the voice-over narration. You will want to begin recording your voice-over after the video recording is complete to be most efficient.

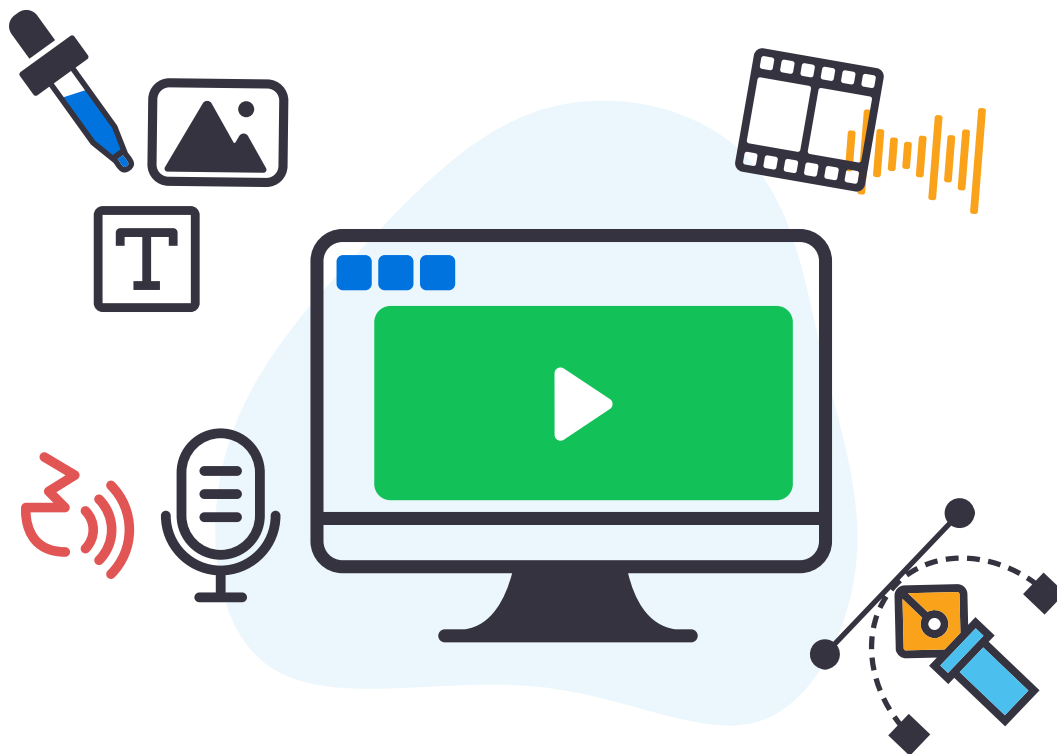
Remember the marked-up script you edited on the day of the shoot? You will be thankful to have it now. Often, when you write the script you have great ideas, but on the day of the shoot those great ideas don't pan out the way you envisioned. Because you decided to change the shot, the voice-over may change as well. By marking up the script you save a lot of time because you don't have to review the footage to see exactly how the script has changed. Also, this is why it's important to wait until after you shoot to record the voice-over.

Make sure that you attend the voice-over recording along with an SME and/or a stakeholder. Attendance may be in person or virtual. This is your last opportunity to make any changes to the script.

During the record, make sure everyone has the most recent copy of the marked-up script. Make sure you are prepared to update the script, just as you did during the video shoot. Again, this provides the editor with a more efficient path to editing the video based on all of the final assets you've created.

Ask the voice-over talent to read each Index number in the script prior to recording. This provides the opportunity to do multiple "takes" of each scene and helps the video editor by providing options. Editors love options!

Phase 4: Post-Production



Now you're ready to put the story together in post-production. Hand over all assets including video, graphics, music, animation, and voice-over narration to the editor. Make sure your editor also has a copy of the corporate styleguide before he begins.

The post-production phase of creating a training video includes assembling the assets, making changes, distribution, and measuring success.

Meet with Your Editor

A pre-edit meeting is paramount to a successful final product. Use this time wisely and read through the script. Discuss all of your assets and provide as much creative direction as possible. By doing this early, you will empower your editor to create a solid rough cut (or first edit). Take the time to discuss the following:

- **Script:** Read through the script aloud and describe your creative direction, the business outcome, and learning objectives.
- **Shot list:** Make note of any exceptional shots to include.
- **Music:** Provide the music genre you envision. Then your editor can select some options for you to listen to using resources like www.pond5.com, www.soundstripe.com.
- **Assets:** Verify that the editor has all of the assets needed to make the video.
- **Voice-over Narration:** Discuss the best takes and any direction you gave the narrator.
- **Timeline:** Review internal check-in points (1st and 2nd review deadlines). Make sure to set a firm deadline of approximately 5 business days for every 3-5 minutes of video to review the first rough cut.

Once editing has commenced, it's important to stay close to the project. Having a common language between you and the editor will go a long way in gaining trust in your conversations. Here is a list of common descriptors that the editor may appreciate you adding to your lexicon.

- **Lower thirds:** Graphics in the lower third portion of your screen that describe the subject.
- **Jump Cut:** Quicken the pace of the cuts to give a more “jarring” effect.
- **J-Cut:** Audio starts before you see the accompanying visual.
- **L-Cut:** Visual and Audio starts simultaneously, but the visual changes while the audio remains.
- **White Flash:** Effects used between cuts to smooth the transition.
- **Audio Mixing:** Adjusting the volume of the different audio tracks (i.e. Music, Voice-over, Sound Effects) to enhance one over the others.
- **Exposure:** Lighting is too “hot” on the subject and the exposure of the image needs to be adjusted.
- **Color Correction Process:**
 - **White Balance:** Objects that are supposed to be white, are indeed white.
 - **Exposure:** Lighting that makes objects in the shot too “hot” can be adjusted.
 - **Contrast:** Balance the black levels in the shadows so they are separated from the highlights.
 - **Color Grading:** Add or subtract colors to the image while maintaining accurate skin tones.

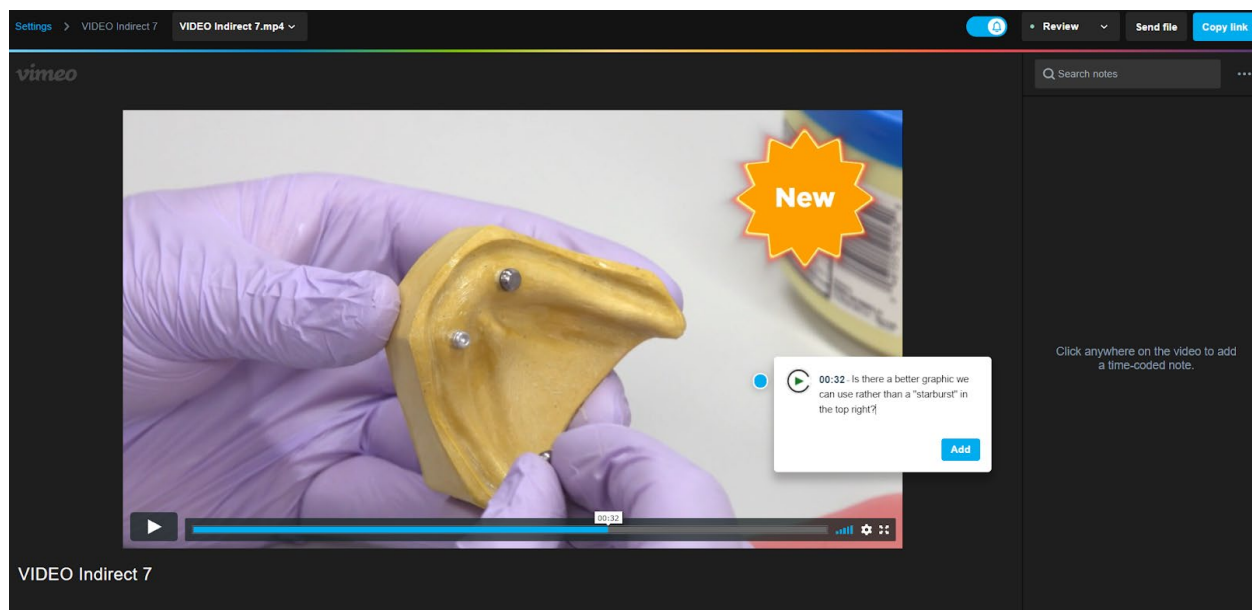


Now that you can talk like an editor, it's time to help manage the workflow. Here is a typical workflow for you to follow along with the editor.

- Import all of the footage into the editing software.
- Make a selects (the best clips) sequence of the takes and b-roll shots.
- Watch all of the raw footage and make sure you and your editor are selecting the best takes.
- Assemble the main story (1st draft - internal rough cut only).

- Do you and your editor have all of the needed assets? Are there holes? If so, can they be filled with additional footage or graphics?
- Revise the first draft including adding music and graphics (2nd draft - internal rough cut only).
- Share the 2nd draft - rough cut with all members of your team using a review tool like [Vimeo](#).
- Final draft video for all members to review using the review tool.

Here is an example of using the Vimeo review tool:



Distribution and Evaluation

After two to three rounds of reviews and revisions, it's time to export your video for distribution. You should talk with IT to identify a hosting source for the video. Also discuss the corporate IT policy for video and video specifications.

Some common outputs for video are MP4, AVI, and MOV, however most hosting systems prefer MP4. You also need the following specifications:

- **Resolution:** 16x9 is the typical aspect ratio for video, however occasionally people ask for the archaic 4x3 aspect ratio.
- **Bit Rate:** This refers to the amount of data encoded per unit of time, and is typically measured by kbps or kilobits per second.
- **Frame Rate:** Typically, video is encoded at 30 frames per second (FPS). Video can be compressed down to a single image per second to reduce the file size. However, you can finger through a flip book faster than that!

Now you can distribute your video across YouTube, our organization's intranet, an LMS, or you can package it in a SCORM wrapper to be delivered on your LMS. Wherever you host it, make sure you have an analytics tool enabled to provide you with data. At the very least, you can embed Google Analytics to track the number of times your video was watched, completed, or exited. However, Google does not share any user data like name, email address, or employee ID.

An LMS provides more user data as well as Level 1 survey-type data and Level 2 reports. If you developed video-based simulations wrapped in SCORM, you can evaluate Level 3 behavior change by scoring the answers to your simulations and passing the variables to the LMS. Following your deployment, you can track your business outcomes over a 30, 60, and 90-day period, and then compare them to pre-course business metrics.

Conclusion

Video is a great way to tell the story, engage, and even interact with your learners.

However, remember that production value is only achieved when you follow the process like a professional. Skip a step, and your learners may not feel or see what you want them to feel or see in the training video. Notice I didn't say "hear." Learners will tune out the voice if they don't feel that the content impacts them.

I provided you with a lot of information and useful tools that you can put into action and start creating effective, engaging, and efficient training videos. However, please reach out if you have any questions or would like additional templates for your next training video production.

Conclusion

If your head is spinning trying to remember it all, you can boil it all down to 7 points:

- 1 Identify the business outcome.
- 2 Articulate the learning objectives.
- 3 Draft a script.
- 4 Record sound and visuals like a professional.
- 5 Follow company branding and compliance guidelines.
- 6 Communicate with your editor.
- 7 Follow up on learners' performance improvement and business metrics.

If you have any questions please don't hesitate to reach out to me at: **dan@cinecraft.com**

I'd be happy to clarify or expand on any of the training video production process.

THE END