



PRODUCTION ORDER OF EVENTS

For CEO's and Directors of Development

Follow this basic plan to stay on target with your production.

Pay Deposit & Sign Contract

Decide on payment, video length (8 to 12 minutes), delivery date and other details.

Pre-Production Meeting

The CEO, Development Director or other top officer, sit down and figure out the following:

- Who is your audience?
- What are the 5 key messages you want to convey?
- Who should we interview (the voices of the video)?
- Where should we interview (locations which help tell the story)?
- What should we show (your visual proof)?

Assign Production Manager

The CEO should assign a Project Manager to oversee the film's development. The role of the Project Manager is:

- To collect and organize the materials needed (*photos & video*).
- Gain permissions to shoot at locations.
- Schedule and coordinate with participants (*the cast*).
- Gain and manage release forms (*as shot*).
- Act as liaison and assistant to your Producer as you move through the process.
- It will also be important for the Project Manager to maintain communications between your producer in the field and the CEO so that he/she is kept in the loop without creating a large drain on his/her time.

Interview Questions List

Start with any corporate messaging you may already have and turn that into questions. Then formulate questions for the different points of view you want to tell the story from. For example, I want questions for volunteers, board members, experts, and most importantly clients or beneficiaries of your service.

Prepare Release Forms

If your organization doesn't already have its own, use a template online or have the organizations legal team formulate one for the production. It should be production specific and a separate release form will be needed for locations, like in a persons' home or at a place of business.

Choose Locations and Get Permissions ([location release form](#))

If you are shooting at a location your organization doesn't own (*like at a school or hospital*) you must first ask permission to do this, then get a signed location release form as mentioned above.

Contact Potential Interviewees & Schedule Them

Now that you know where you can shoot your interviews, call those on your interview list and see if they will be in the video. Schedule their shoot using one of the locations on your list.

Shoot Interviews

Follow the production schedule and shoot your interviews, always with a representative (the production manager) from your organization present as guide and chaperone.

Shoot B-Roll

This is supporting footage which goes over your interview. Try to capture some of your interviewees in their environment, like washing the dishes or hugging their kids if shooting at their home. Some B-roll can be purchased as Stock Footage online. For mission specific supporting footage, go where the action is (like an operating room) and shoot live action, or *stage* some action when shooting the real thing is impossible for legal or other reasons. Look at your upcoming events for ideas.

Edit

Follow the order of NEED, SOLUTION, RESULTS, ACTION, and utilize the Heart Mind Resonance by presenting emotion first, then information, then emotion, then information. Tell the story from your Clients point of view and use their voices most of all. Present your organization as the hero, prove what you do works and show the positive results you create. Ask for what you want and leave the viewer feeling positive with an upbeat ending!

Rough Draft Preview (voices only – key team members only)

This is a preview which consists only of the interview clips lined up to tell a complete story. Music can also be added by this point if you like, which helps amplify the emotion. Only key team members should see this as it is NOT the finished film. It requires some imagination at this point. We want to know if the “messages” are correct and well presented. Provide notes to the editor (producer).

Final Draft Preview (as close as possible to complete)

Share with the CEO first, then the Board of Directors for final notes. These should be minor notes and any artistic notes should be considered suggestions only. Provide final adjustments to the editor (producer).

Spelling, Names & Titles

Have someone from your organization check spelling, names and titles. Pass updates and corrections on to editor (producer).

DVD Disc and Case Art (approved)

Either the Producer, or someone else you choose, needs to design artwork for the DVD disc surface and for its DVD case. Choose your duplication house first and create your designs using their templates. The CEO must approve the final artwork.

Focus Groups (if needed)

Best in the event of disputes, show the video to small focus groups made up of people in your target audience, people from your organization and clients. Get their unfiltered feedback and make final decisions or vital course corrections based on the data. If you have really missed the mark you may have to reshoot and re-edit, a contingency which should be in your contract.

Final Sign-Off w/CEO

Provide the final video to the CEO for approval. From here no changes will be made and masters can be created.

Create DVD-Data Disc

Have your Producer create a DVD-ROM or DVD-DATA disc which contains all of your movie files, signed release forms, ISO file so you can burn your own discs, music rights, replication artwork and any stills taken from the video. Copy this information to your hard drive and keep the disc as a backup. Remember that you will need a DVD reader in your computer to access these files as long as they are on a DVD-ROM disc.

Create Masters

Keep several masters of the DVD. A master is any physical copy of the DVD. You'll need one to send to the duplication house, one to store in a safe place, and several to start using. Have your Producer provide these masters.

Delivery and Final Payment

Pay the balance due only once you have received the masters and Data Disc, as per your contract.

Duplication (music rights, masters, artwork, duplication house, templates, price breaks)

Whether you want thumb-drives or DVD's, you'll need to find a duplication house. Preview their past work for quality, check for price breaks, ensure delivery dates, and download their artwork templates. Send in a physical DVD Master along with copies of your music rights (*usually as an upload to the duplicators website*) and often a short music rights form provided by the duplicator.

Post Online

Use the digital movie files on your DATA-Disc, formatted by your Producer for the web, to post on your website, YouTube channel or blog. Be sure anywhere you post your video to include the proper tags so people find you in a search.

Use for Fundraising

Create a speakers bureau, show at a Gala, grant requests, premiere and private showings. One on one showings with large donors are where you start, at the top of your gift pyramid table. Use the advisor approach to make your presentation better and target large donations at the same time. Wherever you show it, the job if the video is to surface interest and open the door, it's up to YOU to harvest that interest and invite donors to walk through the door.

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