The Video Planning Worksheet

Answer these 7 questions before you hire a videographer

Most videos fail before the camera comes out — not because the footage was bad, but because nobody answered these questions first. Work through all seven before you hire a videographer or press record yourself. Written-down answers turn a vague idea into a brief any good videographer can run with.

1 Who's your audience?

If everyone's the audience, no one is. The more specific the person, the better the video.

- Describe them: age range, where they live, what they do.
- Are they current customers, brand-new customers — or both? (Those are different videos.)
- What do they already know about you? What do they believe about businesses like yours?

2 What's the goal?

The goal decides what kind of video you should even make.

- Pick the main one: drive traffic to your website · build trust · sell something specific · brand awareness · raise your prices by elevating your brand.
- Match the kind of video to the goal: product demo, event promo, educational video, brand story.
- What would success look like if this video knocked it out of the park? Describe the win.

3 Do you have a strategy for distribution?

A great video nobody sees is just an expensive file. Your answers to questions 1 and 2 decide where this belongs — and whether it should feel polished or creator-style.

- Where will it live? Social · your website · YouTube · paid ads · emailed to warm leads.
- If it's for social: who keeps posting after this video — and how often? Do you have the time and resources?
- If it lives on your site or goes to warm leads, ongoing posting matters less. Which is true for you?

4 Who do you need in the video?

Who's on camera changes the budget, the timeline, and the whole shoot day.

- Just you? Your customers? Your employees? Name the actual people.
- Who needs to say yes to their participation — and have they?
- Any scheduling problems to solve before a shoot date is set?

5 Scripted, off the cuff, or somewhere in between?

Match the method to the human. A nervous person memorizing a script is how you get a stiff video.

- For each person on camera: full script, bullet-point outline, or conversation?
- Has anyone used a teleprompter, memorized lines, or done public speaking?
- Who's nervous about being on camera? (It's fine — it's mostly practice. It just changes the plan.)

6 Do you have examples of videos you want to imitate?

“Modern and professional” means a hundred things. A link means one. References save time, money, and miscommunication.

- Paste 2–3 links to videos with the feel you want — any industry is fine.
- For each one: what do you like — the pace, the tone, the look?

7 Do you have the time to actually plan this?

An unplanned shoot burns its budget figuring out on the day what should have been figured out at a desk.

- How much time can you honestly give the planning — this week, before the shoot?
- Who else needs to weigh in, and when will they?
- Would a couple of hours with a strategist save you a reshoot — or point you to a better medium entirely?

Ready check. If all seven sections are filled in, you're ready to get quotes — any videographer you talk to will take you more seriously with this sheet in hand. If a section is still blank, that's your homework, and it's free. Want a second set of eyes on your answers? That's what a 216 Productions content audit is.