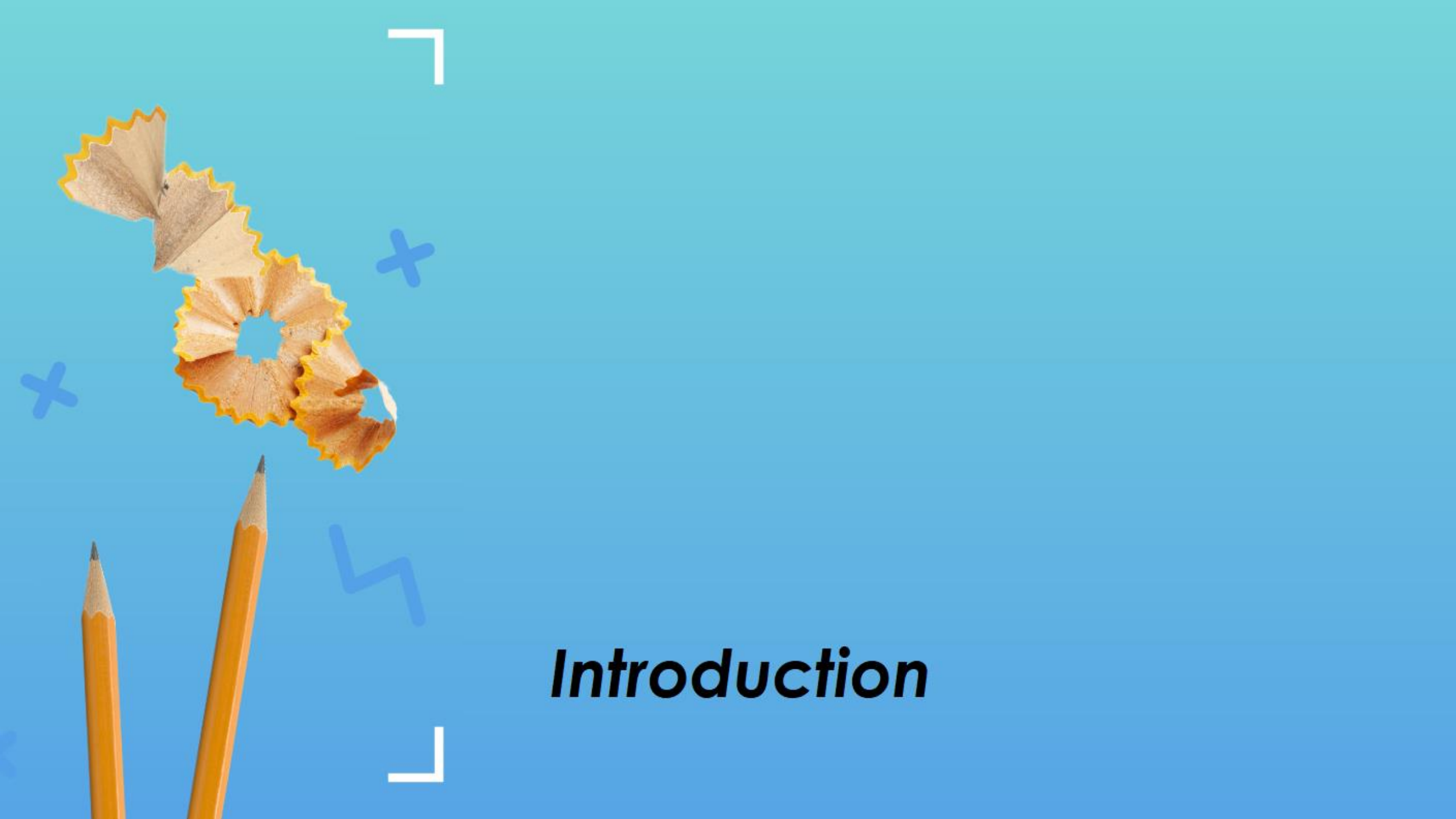


The Video Strategy Workbook

Build a Video Marketing Strategy Step-by-Step

KAadio





Introduction

WORKBOOK

You weren't trying to kill it with video marketing without a robust strategy, were you? Of course not. Because you know that there's a reason to have a strategy and not haphazard content creation. It's the same reason contractors erect the foundation of a building first. Or that all relationships need to have a solid footing to survive.

But what is a "video marketing strategy"? Hello, buzzword! You've probably thought about creating one before. Or at the very least seen it all over the web, tattooed on your co-workers' arms...oh that's just us? Noted.

Really, though. "Video marketing strategy" always seems to be described in meta terms. As a large, fluffy "wish-I-could" cloud that you'd get to if you had time. But where would you even start? Here, that's where. You've already started by getting your hands on this guide. Well done, you!



Step 1: Establishing Your Goals for Video

Step 2: Identifying Your Content Needs



Step 3: Pinpointing the Opportunity for Video

Step 4: Building Campaign Rules of Thumb

Step 5: Crafting a Distribution Plan



Step 6: Transferring Your Brand to Video

Step 7: Setting Guidelines for Viewer Behavior

Step 8: Organizing Your Team



Step 9: Measuring Video Success

Step 1: Establishing Your Goals for Video

Build Brand Awareness

Score Leads

New Customer Onboarding

Increase Campaign Engagement

Educate Prospects on Industry

Increase Customer Engagement

Generate Leads

Educate Prospects on Product/Service

Improve Customer Prospecting

Video Goals & Priorities Worksheet

	General Video Marketing Goals (Select from list above)	Describe Your Goal in More Detail (Keep it to 1-2 sentences)
Ex.	Build Brand Awareness	Increase the exposure of our email marketing solution, Holy Moly Email, with demand generation teams in
1		
2		
3		

Step 2: Identifying Your Content Needs

Buyer Content Gaps Worksheet (Example)

Example Persona: Demand Gen			
	Questions	Comments	Gaps
Attract	How can I be more effective at my job?	Research: "Trends for Demand Gen 2016"	
Convert	How can I get more leads?	Guide: "How to Drive More Leads with Email Campaigns"	
	How can I save time?	Guide: "How to Automate Your Demand Gen Campaigns"	
Engage	How can Holy Moly Email help me get more leads?	Guide: "Drive More Leads Generate more MQLs with the Right Email Tools"	
	How can Holy Moly Email increase funnel velocity?		<input checked="" type="checkbox"/>
	How can Holy Moly Email automate more of the email process?		<input checked="" type="checkbox"/>
Nurture	Will Holy Moly Email integrate with my current tech stack?	Recorded Product Demo	

Buyer Content Gaps Worksheet

Persona: _____			
	Questions	Comments	Gaps
Attract			
Convert			
Engage			
Nurture			

Step 3: Pinpointing the Opportunity for Video

TOFU

Focus on pain points and opportunities, not yet about your products or services

- High-Level Content Promo/Campaign
- Videos or Webinars
- How-To Educational Videos or Webinars
- Thought-Leadership Videos or Webinars
- Company Overview Videos

MOFU

Introduce your solutions and incorporate educational content

- Product Videos or Webinars
- Culture Videos
- Event Videos

BOFU

Hammer home the benefits of your offering

- Product Demo Videos
- Customer Testimonial Videos
- Sales Enablement Videos

Video Content Planning Worksheet

Gap #	Video Type (from above)	General Video Marketing Goal (from Step 1)	Topic Ideas (there are no rules to brainstorming!)
Ex.	<i>Product Feature Video</i>	<i>Educate Prospects on Product/Service</i>	<i>Talking head and screenshot combination with Carol and customer, Carl, speaking to the product benefits.</i>
1			
2			
3			

Step 4: Building Campaign Rules of Thumb

This way, your whole team will be on the same page when it comes to knowing what types of campaigns will include video and what video content will use in-video CTAs, email gates, or full forms (known as “video Events”). Laying this out ahead of time means that fewer decisions need to be made on the fly, and there will be more consistency across the board.

Campaigns with Video Worksheet (1/2)

Campaign Type	Every time	Sometimes	Never	If sometimes, when? When not?	Events & Video Elements (select all that may apply)
Blog	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/> Email Gate <input type="checkbox"/> CTA <input type="checkbox"/> Full Form <input type="checkbox"/> Interactivity <input type="checkbox"/> Personalization
Content Campaigns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/> Email Gate <input type="checkbox"/> CTA <input type="checkbox"/> Full Form <input type="checkbox"/> Interactivity <input type="checkbox"/> Personalization
Live Webinars	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/> Email Gate <input type="checkbox"/> CTA <input type="checkbox"/> Full Form <input type="checkbox"/> Interactivity <input type="checkbox"/> Personalization
Email Marketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/> Email Gate <input type="checkbox"/> CTA <input type="checkbox"/> Full Form <input type="checkbox"/> Interactivity <input type="checkbox"/> Personalization
Product Launches	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/> Email Gate <input type="checkbox"/> CTA <input type="checkbox"/> Full Form <input type="checkbox"/> Interactivity <input type="checkbox"/> Personalization

Campaigns with Video Worksheet (2/2)

Campaign Type	Every Time	Sometimes	Never	If sometimes, when? When not?	Events & Video Elements (select all that may apply)
Event Marketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/> Email Gate <input type="checkbox"/> CTA <input type="checkbox"/> Full Form <input type="checkbox"/> Interactivity <input type="checkbox"/> Personalization
Customer Stories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/> Email Gate <input type="checkbox"/> CTA <input type="checkbox"/> Full Form <input type="checkbox"/> Interactivity <input type="checkbox"/> Personalization
Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/> Email Gate <input type="checkbox"/> CTA <input type="checkbox"/> Full Form <input type="checkbox"/> Interactivity <input type="checkbox"/> Personalization
Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/> Email Gate <input type="checkbox"/> CTA <input type="checkbox"/> Full Form <input type="checkbox"/> Interactivity <input type="checkbox"/> Personalization
Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/> Email Gate <input type="checkbox"/> CTA <input type="checkbox"/> Full Form <input type="checkbox"/> Interactivity <input type="checkbox"/> Personalization

Step 5: Crafting a Distribution Plan

Your videos can receive a massive amount of exposure when they reach beyond your YouTube channel or even beyond your website. Some of these platforms may align with your brand and some may not. Select them early so you can tailor video content accordingly since, you know, a video on Vine can only be 6 seconds, for example. But hey, that might be a perfect opportunity for a teaser of your latest, live-action campaign video—if you plan ahead.

Video Distribution Worksheet (1/2)

Video Distribution Channel	Every Time	Sometimes	Never	If Sometimes, Explain When or When Not
Website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Website Video Hub	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Campaign Landing Page	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Blog	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Partner Blogs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Influencers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
YouTube	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Facebook	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Twitter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Video Distribution Worksheet (2/2)

Video Distribution Channel	Every Time	Sometimes	Never	If Sometimes, Explain When or When Not
LinkedIn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Instagram	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Vine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Pinterest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Paid Promotion Channels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Step 6: Transferring Your Brand to Video

You've worked hard for your brand: to build its story, its values, its image, and its tone. The last thing you want is for your videos to be like a rebellious teenager and just sit in the basement away from the rest of the family (what? you didn't do that?). A consistent brand tells a story to your prospects, and consistency builds trust. As Paul Rand, American Art Director and Graphic Designer best known for his corporate logo designs including IBM, UPS, and Enron, once said:

“Design is the silent ambassador of your brand.”

By planning and documenting video brand guidelines ahead of time, you can stay consistent across multiple video assets and even multiple producers. You'll also have a handy resource to provide your

Video Branding Guidelines Worksheet

Guideline to Consider for Video	How the Guideline Applies for Your Brand	Review for Each Project?
Voice & Tone - Voice is the representation of your brand's personality, and tone is a subset of that voice with a little more wiggle room, depending on your audience, the subject matter, etc. Will you be silly, humorous, approachable, professional?		<input type="checkbox"/>
Colors - You probably already have these set in a current branding doc. You may want to highlight what colors can be used for what, like main text versus shadows, for example.		<input type="checkbox"/>
Typography - You likely have this one laid out, too. Be sure to include if there are any restrictions for usage or guidelines on size. For example, you may want name plates in a certain font while transition screen text is in a different font.		<input type="checkbox"/>

Language & Dialogue - Will you be casual or professional? And how will your company be referred to in this video: first- or third-person?		<input type="checkbox"/>
Logo Usage - What are the general guidelines around your logo: coloring, spacing, and when it should be used in a video? For example, you may want it at the end of every single video or as a watermark in a bottom corner.		<input type="checkbox"/>

Video Branding Guidelines Worksheet

Guideline to Consider for Video	How the Guideline Applies for Your Brand	Review for Each Project?
Music & Audio - This includes voice-overs, music tracks, and sound effects. Your brand extends to include the “look and feel” of a video and the complete experience of your company, which includes music. Will you choose cheesy, spoof soundtracks? Or inspirational ones?		
Imagery - Whether it be motion graphic or live-action, the style of imagery used should align with the tone of your brand. This applies to the type of illustration used for a motion-graphic video, as well as the type of setting and props you shoot for a live-action video.		
Setting - The location of your shoot is just as important as your brand colors and placement of your logo. What vibe should a shoot location give off? Also consider all the elements within it: filing cabinets, wall art, stores in the background, etc.		
Actors - what types of actors should you use? You can provide guidelines on looks, wardrobe, personality, or demographics.		

Step 7: Setting Guidelines for Viewer Behavior

There's more to video than meets the eye. Hidden underneath the compelling stories and special effects is a data goldmine. Due to video's linear nature, it is an extremely trackable medium. Meaning you can see how much of a video viewers watch, what they skip, and what they re-watch. It's a perfect picture of your audience's digital body language: what topics they're interested in and what buying stage they're at.

Individual viewing data can help you qualify and score leads based on how much video they're consuming and what topics they're interested in. You can score leads based on how much of your video a prospect's consumed: the longer they watch for, the more likely they are to be interested in your product or service. And the further the video is down the funnel, the higher the score for a certain completion rate. This can then help you to better qualify leads, build or improve nurture programs, and create or enhance audience segments.

Individual Viewing Rules Worksheet

	Lead Scoring (choose a lead score number or range)		Nurture Events (determine what will trigger sending an email, adding to a retargeting program, sending a text message, sending to Sales for phone follow up, etc.)	
	Time Range, Percentage, or Topics	Lead Score or Range	Time Range, Percentage, or Topics	Email Trigger
Total Amount of Video Minutes Consumed	2-5 minutes 5-20 minutes 20+ minutes	5-15 10-25 20-45	10 minutes 110 minutes	Making the most of email automation. Evaluating an email automation platform.
Total Amount of Video Minutes Consumed				
Percentage of Individual Video Viewed				
Topics of Videos Viewed				

Step 8: Organizing Your Team

Who's responsible for what? If all of your planning efforts are going to pay off, it's important to identify the awesome people who are going to help you get there!

Having a succinct and pre-planned video process means you'll be able to build production schedules easier, plan projects more efficiently, and set appropriate expectations within your team. You may have different people taking the reins for different campaigns, so it's great to get the story straight now!

Video Ownership Worksheet - Planning & Production (1/3)

Task	Video Type (described in Step 3)		
	High-Level Content Promo/ Campaign Videos or Webinars	How-To Educational Videos or Webinars	Thought Leadership Videos or Webinars
Managing Video Strategy			
Setting Per-Video Goals			
Determining Lead Scoring Rules			
Managing the Project			
Brainstorming & Concepting			
Scripting			
Storyboarding			
Filming & Audio Recording			
Designing			

Video Ownership Worksheet - Planning & Production (2/3)

Task	Video Type (described In Step 3)		
	Company Overview Videos	Product Videos or Webinars	Culture Videos
Managing Video Strategy			
Setting Per-Video Goals			
Determining Lead Scoring Rules			
Managing the Project			
Brainstorming & Concepting			
Scripting			
Storyboarding			
Filming & Audio Recording			
Designing			

Video Ownership Worksheet - Planning & Production (3/3)

Task	Video Type (described in Step 3)		
	Event Videos	Product Demo Videos	Customer Testimonial Videos
Managing Video Strategy			
Setting Per-Video Goals			
Determining Lead Scoring Rules			
Managing the Project			
Brainstorming & Concepting			
Scripting			
Storyboarding			
Filming & Audio Recording			
Designing			

Video Ownership Worksheet - Post-Production & Beyond! (1/3)

Task	Video Type (described in Step 3)		
	High-Level Content Promo/ Campaign Videos or Webinars	How-To Educational Videos or Webinars	Thought Leadership Videos or Webinars
Editing & Post-Production			
Reviewing Final Version & Signing-Off			
Uploading to Video Platform			
Setting up CTAs, Email Gates, etc.			
Distributing the Video			
Measuring Per-Video Performance			
Measuring Total Video Performance			
Other: _____			
Other: _____			

Video Ownership Worksheet - Post-Production & Beyond! (2/3)

Task	Video Type (described in Step 3)		
	Company Overview Videos	Product Videos or Webinars	Culture Videos
Editing & Post-Production			
Reviewing Final Version & Signing-Off			
Uploading to Video Platform			
Setting up CTAs, Email Gates, etc.			
Distributing the Video			
Measuring Per-Video Performance			
Measuring Total Video Performance			
Other: _____			
Other: _____			

Video Ownership Worksheet - Post-Production & Beyond! (3/3)

Task	Video Type (described In Step 3)		
	Event Videos	Product Demo Videos	Customer Testimonial Videos
Editing & Post-Production			
Reviewing Final Version & Signing-Off			
Uploading to Video Platform			
Setting up CTAs, Email Gates, etc.			
Distributing the Video			
Measuring Per-Video Performance			
Measuring Total Video Performance			
Other: _____			
Other: _____			

Step 9: Measuring Video Success

Measuring video's impact is about more than view counts. Because...well, logic: you don't measure your website's success by page views alone, so why would you measure a video's success by views? Imagine your viewers all clicked play but then all dropped off within 5 seconds. Maybe you got a lot of views, but we'd bet that video isn't a successful asset that's driving results for your marketing funnel. So let's bring back your video marketing goals and identify how to measure them.

Video Measurement Worksheet (1/2)

Metric Bank:	
<p>Brand Engagement</p> <ul style="list-style-type: none">▪ Number of Views▪ Number of Shares▪ Attention Span	<p>Demand Generation</p> <ul style="list-style-type: none">▪ Number of New Leads Generated▪ Number of Opportunities Influenced▪ Amount of Pipeline Influenced▪ Amount of Closed Revenue Influenced (ROI!)
<p>Click-Through Rates</p> <ul style="list-style-type: none">▪ Email Campaign CTR▪ Video Engagement CTR▪ On-Page CTR (completion of CTA)	<p>Other</p> <ul style="list-style-type: none">▪▪▪

Video Measurement Worksheet (2/2)

	Goal (from Step 1)	Metric & Target (from the Metric Bank)	Metric Source (ex. video marketing platform, marketing automation platform, CRM, etc.)
Ex.	Brand Awareness: Increase the exposure of Holy Moly Email mobile app with marketers in Texas	<ul style="list-style-type: none">▪ View count: 2000▪ Attention span: 70%+	Video Marketing Platform
1			
2			

Congratulations!

You've overcome the biggest hurdle to video marketing success: creating a video marketing strategy. We'd give you a pat on the back but we can't reach.

You've got a solid plan in place for a happy, successful video marketing future. You've set goals, identified content opportunities for video, developed a distribution plan, built out video brand guidelines, determined team responsibilities, and solidified how you'll measure your video marketing success. You're killin' it!

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Thank You !