THE CORPORATE VIDEO WORKBOOK

The step-by-step guide to making video work harder for your business

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TAKE VIDEO TO THE NEXT LEVEL AND BEYOND

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Video is now big business. Companies like yours know video represents a huge opportunity for communicating more effectively and driving greater engagement. In fact, you're probably already producing video for product demos, training and even marketing.

Time to see the whole picture

The thing is, if you're like most companies we speak to, you're probably not tapping into the full potential and value video can offer your business. The reality is that video can benefit almost every part of your organization. And you also might not realize just how easy it is to take your video in-house, producing broadcast-quality results in half the time (and a fraction of the cost).

Plan your way forward

With benefits like these, it's not surprising more companies than ever are taking video projects in-house, enjoying studio-style techniques and multi-camera production. But, while moving video production in house is far simpler than most people imagine, knowing where to start can be a challenge.

Let us help. In this workbook, we've laid out a step-by-step process for moving from where you are now to where you want to be.

Let's get started.

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SECTION 1

FIRST THINGS FIRST - PLANNING YOUR CORPORATE VIDEO STRATEGY



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Getting the foundations right will pay real dividends in the long term. Fortunately, this doesn't have to be complicated. It all starts with answering a few key questions:

Establishing your priorities

- What do you want to achieve? What does success look like in both the short- and long-term?
- Who will be your core audiences?
- What approvals will you need in place to get your videos produced?
- Is there an overarching initiative that video can help move forward?
- What will you measure? How will you check if you're on track?

Establishing your expertise

- What have you done so far? What are the key learnings from your experiences to date?
- How much do you already do in-house and how much with third-parties?
- What's the cost of third-party production to your business (money, time, and (in)flexibility)?
- Are you already producing the six core types of video in-house (demos, sales training, all-hands meetings, skills development, conferences, and thought leadership)?
- If not, what are the opportunities to expand what you're doing?

Establishing the costs

- What budget will you need? Where will it come from?
- Are there opportunities to approach other departments such as sales or HR for additional funds?
- What are the key areas where you can save money in-house – faster production, no third-party costs, quicker editing?
- How will you establish ROI for your efforts? (It's always best to focus first in the areas where you can see the best returns and then expand from here.)

Once you've answered these questions you should have a clearer, more defined strategy, focused on what you plan to do and how you plan to achieve it.

SECTION 2

ESTABLISHING AN ACTIVITY CALENDAR

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It's, of course, tempting to dive straight in and start creating. Who wouldn't? But don't make the mistake of trying to do everything at once.

It's always better to start small and grow as you become more experienced and more comfortable with video. First, determine the quick easy wins. Are there some high profile events you can shoot and make available online? Can you create a short series of thought leadership or how-to instruction videos? Or can you up your game when it comes to sales training?

Plan to win

From your initial tests, decide the key videos you will produce in the next year. These could be anything from covering specific events and corporate meetings through to delivering analyst briefings, product launches and key marketing initiatives.

Then look at how you'll split these out month-by-month, keeping an eye out for any periods which could lead to bottlenecks. Look at how your calendar matches in with wider industry events to see whether you can benefit from them. You can then decide on your core themes for each type of video and the messages they need to convey.

Finally, think about how you'll get in front of your audiences. What channels will you air on (e.g., online, on partner sites, on your intranet or via the extranet)? How will you promote your videos? It's no use producing great videos that no one ever sees.

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SECTION 3

THE PEOPLE YOU NEED TO HAVE IN PLACE

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Even though you won't necessarily need professional video experts any more, you'll still need to have the right people in place if you're to make your corporate video work to its full potential. Here are a few key people you need to think about:

- **Decide who you need behind the camera.**
  Previously these would have had to be highly trained video professionals. Now, however, with today's new technology, pretty much anyone can quickly get up to speed and produce a professional-quality video. In fact, you might even consider using unmanned, static cameras.

- **Decide who'll be on camera.**
  Who are your presenters?
  Do you need different ones for different kinds of video? Can you easily access subject matter experts, executives, product specialists?
  Do you need to bring in people from other locations (either physically or via video conferencing tools)?

  Whoever you decide on, remember the people in front of the camera are representatives of your company brand, so choose them carefully.

- **Decide whether you need professional media training for your key presenters.**
  If your people are worried about how they'll come across, this is always a good idea. It can really boost their confidence, improving their performance in front of the camera.

- **Decide whether you need some basic hair and makeup support.**
  This might sound a bit 'Hollywood' but it can make a huge difference when you are aiming for a truly professional finish.

- **Ensure time is on your side**
  Once you have made your decisions, make sure you leave enough time for your presenters to deliver a quality performance. You'll find you need to cater for more time at the beginning as everyone warms up and gains experience. But over time your productions will get faster and faster – we have clients who can deliver professional breaking news productions in a matter of minutes.

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SECTION 4

THE IMPORTANCE OF YOUR SET

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Sets can make or break productions. So decide carefully where you will shoot. Are you planning to do it in-house, in a studio, on a virtual set, or on the road?

If you are planning to stay in-house, think about:

- What space do you have available – is it appropriate and the right size?
- Will you need to set it up each time?
- Can you create a pre-designed physical set to help glue your production together – maybe by buying a distinctive piece of furniture you use every time?
- Will your space be quiet enough so you can record your videos without interruption (bear in mind these interruptions can just as easily come from road noise outside)?

If you're planning on creating a more professional set, consider the following:

- You can get a professional look simply by placing your presenters in front of a green screen, then just replace the background with professional looking images, charts etc.
- If you need something higher-end, virtual sets are now easier to work with than ever. You just need a place to hang your green screen and you're good to go.
- While today's systems have off-the-shelf sets available, you'll probably want to customize these in advance to create your own unique look and feel. Decide what elements will help you brand your productions and deliver a consistently professional look and feel.

If you're planning to go on the road, here's what you need to be mobile:

- Even if you're planning on just going down the hall, you need to ensure you can quickly and easily pack up the kit and carry or roll it around without too much effort.
- You need to be able to set everything up on site without too much wasted time.
- When you're mobile, every piece of equipment counts (both in terms of time and effort) so make sure you understand what you need in terms of connectivity, space and power at any location you'll be filming at.
- It's always a good idea to try a dry run – this can be as simple as packing everything up and moving it into a room on-site to make sure you have everything you need to create your video
- Finally, ensure you know what's available at your chosen venue (make sure you don't get caught out by not having basics such as enough power sockets)

SECTION 5

LET’S TALK KIT

Once you’ve laid on the groundwork and have all the basics of what, where, when and who you’re shooting, you need to invest in the right kit to deliver the best results. In this section we provide kit lists for different levels of production, together with some tips for buying what you need. If you’re currently producing video, you may already have some of the equipment you need.

OPTION 1: DO-IT-YOURSELF LIVE VIDEO FROM ANYWHERE

Countless video production departments and companies begin with a staff of one. At this stage, you'll need to be fast and flexible, taking on projects that might include **interviews, announcements, demonstrations or promotional videos.** You're often required to bring the studio to the production location – and always expected to deliver professional results.

Let's see what you'll need.

SAMPLE KIT LIST

Must haves:

- ☐ Network connection and Ethernet cable
- ☐ TriCaster® Mini X
- ☐ Up to 4 live cameras with HDMI connectivity or up to 8 video inputs via NDI®
- ☐ Microphone (1/4”)

  Indoor production: Lavalier microphones with wireless receivers or wireless system with handheld microphones

  Outdoor production: Wired handheld microphones or wired condenser lavalier microphones
- ☐ Cabling

  6’ to 10’ (2m to 3m) HDMI accessory cables appropriate for your quantity of live cameras and your location

  Audio cables up to 20’ (6m) as needed to support sound capture devices
- ☐ Power source and heavy-duty extension cords
- ☐ 1 stand-alone monitor

Seriously consider:

- ☐ TriCaster Mini control surface as part of the TriCaster Mini bundle.
- ☐ Tripods – one per camera as needed
- ☐ Green screen – choices include collapsible background or chroma cloth sheet. For a permanent fixture, consider green chroma key paint
- ☐ Lighting kit – stands, fixtures, bulbs and diffusers for minimum three-point lighting (key, fill and back light) on each scene

Nice to have:

- ☐ Storage media, such as a USB thumb drive or external hard drive, for transferring video or images (8GB or above recommended)
- ☐ Laptop for screen-sharing or to use as additional live content source

The crew:

- ☐ TriCaster operator (mandatory; any experience level from basic switching to skilled technical director or vision mixer)
- ☐ Camera operators (optional)
- ☐ Audio operator (optional)

FOR BEST RESULTS

Shopping

- ☐ This particular kit can be advantageous when traveling or working in tight spaces. When exploring your options for accessory gear, consider smaller, lighter items intended for portable use. In fact, with just a few strategic purchases, you can have everything you need to setup a basic television production studio fit inside a backpack that you can take with you anywhere.
- ☐ Standard HDMI accessory cables, like the ones suggested in this kit, are generally suitable for short-range production use. Longer accessory cables are available, as are other options involving format conversion, but be advised that these alternatives will introduce additional expense and complexity.

Prep

- ☐ If you know where you are setting up for your production, try to visit the location ahead of time and always arrive earlier than you think you need to on the day. It will save time and effort if you discover any complications early.

Production

- ☐ Don’t be afraid to keep productions simple at first. Even TriCaster’s most basic functions are enough to produce video that is far more visually interesting and polished than your typical online or smartphone video clip. And your video will look like your crew and your budget are much bigger than they actually are. With a little practice, you’ll become more confident and comfortable.

OPTION 2: SMALL, BUT GROWING

It’s always wise to start with something small. A production aimed at a finite audience, programming produced for a specialized purpose, or locations of limited size. An example would be **professional workshops, seminars or webcasts.** Or **distance learning** or **training applications.**

Let’s see what you’ll need.

SAMPLE KIT LIST

Must haves:

- ☐ Network connection and Ethernet cable
- ☐ TriCaster Mini 4K and Flex Control Panel
- ☐ Up to 8 IP Video inputs via NDI
- ☐ Microphones (XLR or 1/4”)

  Indoor production: Lavalier microphones with wireless receivers or wireless system with handheld microphones

  Outdoor production: Wired handheld microphones or wired condenser lavalier microphones
- ☐ Cabling

  25’ to 50’ (8m to 16m) video cables appropriate for your choice and quantity of live cameras and their connection types

  Audio cables up to 50’ (16m) as needed to support sound capture devices
- ☐ Power source and heavy-duty extension cords
- ☐ 2 stand alone monitors (for user interface plus multiviewer)

Seriously consider:

- ☐ Tripods – one per camera as needed
- ☐ Green screen – choices include collapsible background or chroma cloth sheet. For a permanent fixture, consider green chroma key paint
- ☐ Lighting kit – stands, fixtures, bulbs and diffusers for minimum three-point lighting (key, fill and back light) on each scene
- ☐ Audio mixer – table top or portable audio mixer with enough inputs and outputs to accommodate your sound needs

Nice to have:

- ☐ Storage media, such as a USB thumb drive or external hard drive, for transferring video or images (8GB or above recommended)
- ☐ Laptop for screen-sharing or to use as additional live content source

The crew:

- ☐ TriCaster operator (mandatory; any experience level from basic switching to skilled technical director or vision mixer)
- ☐ Camera operators (optional)
- ☐ Audio operator (optional)

FOR BEST RESULTS

Shopping

- ☐ If your production schedule is light or your budget limited, you may want to start out by renting equipment and hiring freelance personnel. In addition to dedicated production houses and agencies, many retailers and resellers offer rental packages and have a network of industry connections, including Certified Operators for TriCaster.
- ☐ If you are looking to buy, explore your options – especially if you're on a budget. Gently used or pre-owned equipment is always an option when you are starting out.

Prep

- ☐ Most camcorders come equipped with a short-range breakout cable for output to a display or production system, but the connection type and length are not always suitable for live production use. Go with the cables recommended in the sample kit list instead.
- ☐ The length of camera cables depends on the proximity of your cameras to your TriCaster or equivalent production system, but it's almost always better to go longer than you expect you'll need. And be sure to run cables appropriately and keep away from high-traffic areas if possible.

Production

- ☐ Anything can happen when you're live. Use TriCaster's ISO recording feature to record your show as it happens, as well as the individual camera angles, so you can change out shots, cover up mistakes, or hide unwanted visuals in post-production for on-demand or archived versions.

OPTION 3: EVERYDAY CORPORATE VIDEO PRODUCTION

If you're planning on getting more serious about producing more shows more often or live streaming – for productions such as **corporate communications, product launches and quarterly meetings** – then this section is for you. Here we're talking about productions aimed at larger audiences (or both in-house and online viewers), frequently scheduled programming, or locations where there is more ground or action to cover. This core setup is ideal for establishing a credible presence with employees, customers and viewers.

Let's see what you'll need.

SAMPLE KIT LIST

Must haves:

- ☐ Network connection and Ethernet cable
- ☐ TriCaster 1 Pro with Flex Control Panel
- ☐ Up to 16 simultaneous external video inputs, supporting any combination of compatible sources in resolutions up to 60fps
- ☐ Microphones (XLR or 1/4”)

  Indoor production: Lavalier microphones with wireless receivers or wireless system with handheld microphones

  Outdoor production: Wired handheld microphones or wired condenser lavalier microphones
- ☐ Cabling

  75’ to 100’ (24m to 32m) video cables appropriate for your choice and quantity of live cameras and their connection types

  Audio cables up to 100’ (32m) as needed to support sound capture devices
- ☐ Power source and heavy-duty extension cords
- ☐ At least 2 stand alone monitors (for user interface configurable workspaces)

Seriously consider:

- ☐ Tripods – one per camera as needed
- ☐ Studio camera pedestal or dolly – one per camera as needed or as space allows (indoor use)
- ☐ Green screen – choices include collapsible background or chroma cloth sheet. For a permanent fixture, consider green chroma key paint
- ☐ Lighting kit – stands, fixtures, bulbs and diffusers for minimum three-point lighting (key, fill and back light) on each scene
- ☐ Audio mixer – table top or portable audio mixer with enough inputs and outputs to accommodate your sound needs

Nice to have:

- ☐ Storage media, such as a USB thumb drive or external hard drive, for transferring video or images (8GB or above recommended)
- ☐ Laptop for screen-sharing or to use as additional live content source

The crew:

- ☐ TriCaster operator (mandatory; any experience level from basic switching to skilled technical director or vision mixer)
- ☐ Camera operators (optional to mandatory considering the scope of your coverage)
- ☐ Audio operator (optional to mandatory considering the scope of your coverage)
- ☐ Producer (optional to run an aspect of TriCaster via LivePanel)

FOR BEST RESULTS

Shopping

- ☐ Robotic PTZ cameras, consumer or prosumer camcorders, and action sports cameras are also viable, cost-effective options for adding more overage, new angles and different perspectives to your live show.

Prep

- ☐ For frequent to everyday programming, consider investing more time, effort and resources into your lighting. Whether you're working in an actual studio or with a green screen, appropriate lighting is a critical component in creating polished, professional visuals, especially for regularly scheduled productions.

Production

- ☐ As the number of cameras and sources increases, it becomes more important for the operator to be comfortable at the controls. If your technical director is new to multi-camera live streaming, it may be wise to scale back from the show you envision initially and work your way up as your operator gains experience.

OPTION 4: HIGH VALUE, HIGH PERFORMANCE PROGRAMMING

Today's audiences increasingly expect professional broadcast-quality programming. **If you're a global company or corporation looking to make online video core to your brand,** this section is for you. The key factor will be your demand for top-end production values – regardless of the transmission medium. Having a top-flight production system, a lot of advanced prep and a creative professional at the controls sets the stage to extend your brand further with corporate video.

Let's see what you'll need.

SAMPLE KIT LIST

Must haves:

- ☐ Network connection and Ethernet cable
- ☐ TriCaster 2 Elite with Flex Control Panel
- ☐ Up to 32 simultaneous external video inputs, supporting any combination of compatible sources in resolutions up to 60fps
- ☐ Microphones (XLR or 1/4”)

  Indoor production: Lavalier microphones with wireless receivers or wireless system with handheld microphones

  Outdoor production: Wired handheld microphones or wired condenser lavalier microphones
- ☐ Cabling

  Video cables 100’ (32m) or longer appropriate for your choice and quantity of live cameras and their connection types

  Audio cables 100’ (32m) or longer as needed to support sound capture devices
- ☐ UPS power supply with power conditioning and surge protection
- ☐ Heavy duty extension cords as needed
- ☐ Up to 4 monitors for user interface, multiviewers and other workspaces (up to two 4K monitors)

Seriously consider:

- ☐ Tripods – one per camera as needed (indoor/outdoor use)
- ☐ Studio camera pedestal or dolly – one per camera as needed or as space allows (indoor use)
- ☐ Camera crane or jib arm
- ☐ Green screen – choices include collapsible background or chroma cloth sheet. For a permanent fixture, consider green chroma key paint
- ☐ Studio lighting – stands, fixtures, bulbs and diffusers for minimum three-point lighting (key, fill and back light) on each scene
- ☐ Studio grade audio mixer with enough inputs and outputs to accommodate your sound needs

Nice to have:

- ☐ Two-way communication systems for director, talent and production personnel
- ☐ Storage media, such as a USB thumb drive or external hard drive, for transferring video or images (8GB or above recommended)
- ☐ Laptop for screen-sharing or to use as additional live content source

The crew:

- ☐ Experienced TriCaster operator (mandatory)
- ☐ Camera operators (mandatory to get the best results)
- ☐ Sound operator (optional to mandatory considering the scope of your coverage)
- ☐ Technician or gear specialist (may also be your operator)
- ☐ Producer (mandatory and can also control TriCaster via LivePanel)

FOR BEST RESULTS

Shopping

- ☐ Complex video sequences are a trademark of high-end productions. Automate these visuals with any number of MIDI controllers (including iPad apps) and TriCaster macros. You can even manage live performance elements like lighting and sound from the same controller for consolidated operation.

  Increase your coverage with the addition of an external video router. Plug in double or triple the amount of cameras (or even more) and switch between all of the angles right from the TriCaster interface.

Prep

- ☐ The bigger and bolder the show, the more time you'll need to spend in pre-production – configuring macros, routing audio mixes, setting up shots, etc. Crunch time isn't the time to fine-tune your workflow.

Production

- ☐ An inventory of A-list gear can only go so far to make a live stream look like live television. An experienced operator will make the difference between a show that looks standard and one that looks spectacular. Invest in hiring a professional or training your staff appropriately (for TriCaster, we strongly recommend having a Certified Operator).

THE POSSIBILITIES ARE ENDLESS (AND EASIER THAN YOU THINK)

It’s never been easier to create professional multi-camera video in-house. With the right planning and the right equipment you can begin to realize the full potential of corporate video within your business.

If you have any questions, please get in touch, we’ll be happy to help.

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