Video for Moments That Matter

by Sam Yudes on behalf of IVP

Video is perhaps the most effective storytelling and brand-building medium for any type of business. At Glass & Marker, I've spent 8 years helping many of the world’s fastest growing companies tell their stories. Whether you have in-house skills or need to hire outside help, use this jumpGuide to plan for and achieve professional video results.

Video Categories

There are several kinds of video, each serving a distinct purpose and bringing with it unique planning, budget, creative, talent, post-production and distribution/PR considerations.

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Length</th>
<th>Example Video</th>
<th>Read More</th>
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</thead>
<tbody>
<tr>
<td>The Customer/Partner Story</td>
<td>These stories, or testimonials, provide third-party validation. They’re helpful for social, marketing, sales enablement and education, and they are typically 2-4 minutes in length.</td>
<td>Example Video</td>
<td>Read More</td>
<td></td>
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<tr>
<td>The Product Explainer</td>
<td>An explainer quickly distills a product or a service. It’s often animated or a hybrid of animation and live action. It’s usually 1-3 minutes in length.</td>
<td>Example Video</td>
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<tr>
<td>The Conference/Longform Presentation</td>
<td>Longer format videos are the most effective for deeper, richer communication and storytelling. This video type requires a complete script with a cohesive set of key messages.</td>
<td>Example Video</td>
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<tr>
<td>The IPO Roadshow</td>
<td>Video is an essential tool for a successful IPO roadshow, enabling you to efficiently communicate to a broad investor audience with a consistent and compelling message. Typically 20-35 minutes long.</td>
<td>Example Video</td>
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<tr>
<td>The Pitch</td>
<td>These videos sell an idea, product or individual and are typically tied to a larger campaign. They are often structured as explainers with a call to action. Typically 1-3.5 minutes in length.</td>
<td>Example Video</td>
<td>Read More</td>
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<tr>
<td>Sizzle</td>
<td>If you want to build buzz or excitement, a sizzle video promotes products or services through demos, testimonials and highlights in a fast-paced, high-energy format. Typically 1-2 minutes long.</td>
<td>Example Video</td>
<td>Read More</td>
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Before You Start Shooting a Video

As with every other tool your business employs, video requires an understanding of its power and scope, its benefits and costs and a clear plan to achieve your objectives. Your video strategy should:

Step 1: Clarify Your Objective

- Clearly state what your goals are for the video, including timeline. What result(s) are you trying to achieve?
- Rank them in order of importance.
- Determine how you are going to measure results.

Step 2: Define Your Audience

- Clearly state who your audiences are for the video.
- Rank them in order of importance.
- Determine what the most important points are to communicate to each audience.
  - What needs do they have?
  - What preferences do they have?
  - What concerns do they have?
  - What objections might they have?

Step 3: Establish Your Tone

Tone informs the flow, color, pace, sound and look and feel for each moment in a video. That’s why, to get it right, you must define your target audience, what you want from it and what you believe that audience is looking for. This will prepare you to meet the audience where it is. It will allow you to focus on the elements of your brand and story that most precisely and compellingly communicate your message.

Step 4: Identify Resources

Once you’ve gone through steps 1-3, determine which resources will be the most helpful in the creative and execution process. Examples include brand guidelines, past and current presentations, existing visual content, articles or reports and third-party input.

Hiring an Agency/Production Partner

If you have an internal video team, you’ll need to carefully consider whether that team is the right one to create the video you need. Whether operating in-house or with a partner, prioritize project leadership that focuses on maximizing the value of your investment based on your objectives and audience and the team’s ability to deliver quality.
Key considerations

**Timeline:** How long do you need to deliver on your expectations? Can your internal team do it at the level of quality you need?

**Creative Resources:** Can the team you have in mind perform the necessary creative work to produce a video at the quality you want and need?
- Concepting, creative refinement, scripting, pre-visualization, pre-production, legal and stakeholder review
- Multiple rounds of post production, (editing, motion, design) and finishing (color, sound mix, deliverable creation)

**Budget:** This is connected to the ROI you expect from your video. Considering your objectives, identify what you’re willing to invest.

**In-House Capabilities:** Working with your internal team will likely lower the hard costs of the video. This team will also begin the project with a familiarity of your business. Combined with the technical production resources (i.e., crewed studio, cameras, post-production capabilities), an in-house team can add value and reduce costs.

**Outside Expertise:** Consider whether an outside perspective or unique skill set is going to drive better results. Outside parties often have deep expertise that offers unparalleled value, along with project management skills for crucial moments. The right partners shouldn’t require months of onboarding or education to advise or build content aligned with your brand and needs.

About the author: [Sam Yudes](#) is CEO of [Glass and Marker](#).
Customer stories or testimonial videos are powerful tools for enterprise companies to showcase the value of their products or services through the real-life experiences of satisfied customers. These videos can positively influence customer decisions and build trust in your brand. Here are the elements to consider to create an effective customer story video.

**Video length**

Keep your customer story video concise and engaging, ideally between 2 to 4 minutes. To maintain viewer interest, focus on the most impactful moments and avoid unnecessary detail.

**Budget**

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<th>Estimated range of $18,000 - $60,000</th>
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<td><strong>Budget percentage breakdown:</strong></td>
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Factors that influence the cost include production quality, location, crew size and post-production requirements. Allocating a sufficient budget ensures a polished, high-quality end product that reflects well on your brand.

**Choose the Right Customers and Stories**

Select representative customers who embody your target audience and have had significant success with your product or service. Consider diversity in industry, company size and demographics to appeal to a broader audience. For example, a cybersecurity firm might showcase testimonials from clients in finance, healthcare and e-commerce.

Curate compelling stories that demonstrate the impact of your product or service on customers' lives, emphasizing relatable and inspiring experiences. Look for stories that address common pain points, showcase unique use cases or highlight exceptional results.
Develop Your Video’s Structure and Script

Create a story arc
Create a story arc that outlines the customer's journey, from the initial problem they faced to their experience with your solution and the results they achieved. This structure helps viewers identify with the customer and understand the value of your product or service.

Write an interview script
A well-crafted interview script will guide the conversation, elicit meaningful responses and engage your target audience. Do some research on your interviewee before the interview. This will help you establish common ground and ask more informed questions. Here are some considerations for crafting an effective interview script:

- **Tailor questions to your target audience**: Consider the demographics and interests of your target audience when crafting your questions. Ask questions that are relevant and meaningful to them, and avoid using jargon or technical terms that might be confusing.

- **Use storytelling techniques**: Incorporate storytelling techniques into your questions to elicit more engaging and emotionally resonant responses. For example, ask your interviewee to describe a specific moment or experience that highlights the impact of your product or service.

- **Write open-ended questions**: Craft questions that will guide the conversation and elicit meaningful, authentic responses. Allow room for spontaneity, as unscripted moments often provide the most powerful insights. For instance, ask questions about the customer's challenges before using your product, their decision-making process, and the outcomes they experienced.

- **Be concise**: Keep your questions focused and concise, and be mindful of time. Consider setting a time limit for the interview to ensure you capture all the necessary information without overtaxing your interviewee's attention span.

Plan and Execute the Video Shoot

Pre-production
Coordinate with your selected customers to schedule interviews, secure locations and arrange for necessary equipment, crew and permissions. Maintaining good customer relations throughout the production experience is essential. Make sure to accommodate their schedule and preferences while planning the shoot.

Working with an experienced video agency can make a significant difference in ensuring a smooth and enjoyable experience for your customer during both the planning and execution phases. A professional agency will carefully plan the filming and logistics to minimize any disruptions to the customer's business, and will be prepared to address any concerns or requests the customer may have.
Conduct the interview

Establish rapport with your interviewee, making them feel comfortable and relaxed. Ask your prepared questions, but be ready to adapt and explore new topics that arise during the conversation. Avoid leading questions that might detract from the authenticity of the story. Use active listening to respond to their answers with thoughtful follow-up questions, and encourage them to expand on their responses. An experienced video agency will have skilled interviewers who can create a comfortable environment and guide the conversation, ensuring you capture genuine and engaging content.

Capture B-roll

B-roll is supplemental or alternative footage intercut with the main shots. B-roll is an essential component of a customer story video that adds depth and context to the interviewee's story. In addition to showcasing the interviewee's work environment, daily activities, or interactions with your product or service, B-roll footage also provides a way to cover edits and improve the overall performance and story flow of the edit.

During the editing process, you may find that certain parts of the interview footage need to be cut or trimmed to improve the overall flow and pacing of the video. In these cases, B-roll can be used to cover the cuts and provide a visual break that helps the video flow smoothly. B-roll can also be used to add visual interest and emphasis during transitions or to highlight key points in the interviewee's story.

By capturing plenty of B-roll during the shoot, you give yourself more options to work with during the editing process. You can experiment with different shots and sequences to find the best way to tell the interviewee's story and engage your target audience. With well-crafted B-roll, you can greatly improve the overall performance and story flow of your customer testimonial video, making it more engaging and visually appealing.
Post-Production and Editing

Assemble the narrative

Assembling the narrative is a crucial step in creating an effective customer testimonial video. Review the interview footage and select the most engaging, authentic and relevant segments to create a coherent and compelling narrative that effectively conveys the customer's experience and your product's benefits. Start by organizing the footage into logical segments based on key themes and messages, such as the customer's challenges, their decision-making process and the outcomes they experienced after using your product or service. Use active listening and empathy to identify the most powerful moments in the interview that best illustrate the customer's experience.

Add visuals and sound

To create a visually appealing and cohesive video, use B-roll, on-screen text, graphics and music that align with your brand's style and tone, reinforcing your company's identity and messaging. B-roll can be used to illustrate the customer's story, showcase their work environment or demonstrate the use of your product or service. On-screen text can be used to reinforce key messages, highlight important statistics or add context to the visuals.

Choosing the right music is also crucial to creating an emotionally engaging video. Select music that fits the tone of your video and reinforces the message you want to convey. Consider using music that reflects the emotions of the interviewee or that matches the pace and mood of the visuals.

Optimize Your Video for Distribution

Formats and resolutions

Make your video accessible on various platforms and devices by providing it in multiple formats and resolutions. This flexibility ensures the best possible viewing experience for your audience, regardless of the device or platform they use.

SEO optimization

Improve your video's visibility and reach through search engine optimization (SEO) by optimizing its title, description, and tags. Effective SEO helps your video rank higher in search results, making it more likely to be discovered by potential customers.

Distribution channels

Distribute your video across multiple channels such as your website, social media platforms, and email marketing campaigns. Embed the video on your product page, share it on LinkedIn and Facebook, and include it in a newsletter to your subscribers. Identify the channels that are
most relevant to your target audience, and tailor your promotional strategy accordingly. This can increase engagement and maximize the reach of your video.

**Track performance metrics**

Measuring the success of your video content is critical for improving your video production strategy and achieving your business goals. Track metrics such as views, engagement, conversions, and ROI using video analytics tools like Google Analytics, YouTube Analytics, and Vimeo Stats. Look for patterns and trends over time to identify what works and what doesn't, and set clear goals and KPIs for your video content to measure success and adjust your strategy accordingly.

By analyzing your video metrics and making informed decisions about your video production strategy, you can improve the effectiveness of your video content over time. Use the data to create videos that resonate with your audience, drive engagement, and achieve your business objectives. For example, if your video generates a high number of views but has a low conversion rate, consider adjusting your call-to-action or refining your target audience.

**Conclusion**

Creating a great product explainer video for your enterprise company requires careful planning, strategic messaging, and a keen understanding of your target audience. By following this detailed guide, you will be well on your way to producing a compelling explainer video that effectively communicates your product's benefits and drives results for your business. With each video you create, you'll gain valuable insights and refine your approach, ultimately leading to more successful marketing campaigns and increased sales.
Creating a great product explainer video is an essential component of a successful marketing strategy. Explainer videos help potential customers understand the value of your product and can drive increased engagement and sales.

Here are the elements to consider to create a compelling explainer video.

**Video length**

Keep your video concise and engaging, ideally between 1-3 minutes. Shorter videos are more likely to retain viewers' attention and effectively communicate your message.

**Budget**

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**Story and Script Development**

**Craft a compelling narrative**

Develop a clear, concise, and engaging story that highlights your product's benefits and features. Focus on how your product solves a specific problem or improves the lives of your target audience. For example, a project management software company might demonstrate how their tool streamlines team communication and increases productivity.

**Write a persuasive script**

Write a script that communicates your core message effectively. Ensure that it quickly captures the attention of your target audience, flows smoothly and maintains a well-organized structure with a compelling call-to-action at the end. You might start by presenting a problem, introducing your product as the solution, showcasing its benefits and concluding with a powerful call-to-action, such as "Sign up for a free trial today!"
Production Process

Pre-production

Allocate adequate time for planning your video production, ideally 4 to 6 weeks. In the pre-production process for live-action videos, the essential steps are scouting suitable locations, casting the right actors and assembling an experienced production team. Consider factors like accessibility and available natural light for locations, and ensure that actors understand your product and message. Collaboration and communication among the production team members contribute to a cohesive final product. Plan and schedule the shooting days, taking into account the availability of the cast, crew and locations, while also allowing time for contingencies.

For explainer videos that rely more on animated motion graphics and voice-over, the pre-production process will differ slightly. First, collaborate with the director and scriptwriter to develop the video’s narrative and storyboard. Next, select a suitable voice-over artist who aligns with your brand’s tone and style. Then, work with a motion graphics designer to create the key visual elements needed for the video. Finally, choose a background music track that complements the visuals and voice-over.

Working with an experienced agency partner can significantly improve the pre-production process. An agency brings valuable experience and industry knowledge, ensuring that your video adheres to best practices and achieves the desired impact. The experienced partner can efficiently manage resources, including budget, equipment and personnel, helping you stay on track and avoid costly delays. Partnering with an agency allows you to collaborate with a diverse team of creative professionals, resulting in a more polished and engaging final product. Additionally, an agency will establish a clear workflow and timeline for the pre-production process, keeping your project organized and on schedule. With access to high-quality resources and industry professionals, an agency can ensure that your video meets or exceeds your expectations.

Production

Allocate approximately 1 to 2 weeks for the production stage, during which the filming takes place. If your video does not have any live-action components then you’ll move directly into the post-production stage. Ensure that your visuals, audio and script are aligned and of high quality. To ensure successful filming days, establish clear communication between all team members, set realistic deadlines and maintain a consistent visual style throughout the production.

Post-Production

Allow for 3 to 4 weeks for the post-production process, which involves editing your video and adding transitions, sound effects, music and any additional visual elements to enhance the final product. For product explainers that are primarily motion graphics, you may require an additional 1 to 2 weeks of post-production. Take care in selecting background music that
complements the visuals and voice-over, as it can greatly impact the overall engagement with the target audience.

**Optimize Your Video for Distribution**

**Formats and resolutions**
Ensure your video is available in various formats and resolutions, making it accessible on different platforms and devices. For example, you might create a 1080p version for YouTube, a square format for Instagram, and a shorter, vertical version for Instagram Stories or TikTok.

**SEO optimization**
Optimize your video's title, description and tags for search engines to improve its visibility and reach. For example, use relevant keywords in your video title and description, and add tags that accurately represent your video's content.

**Promote and Measure Your Video's Performance**

**Share your video**
Maximize your video's reach by distributing it across various channels, such as your website, social media platforms and email marketing campaigns. For instance, embedding the video on your product page, posting it on LinkedIn and Facebook or featuring it in your newsletter can help increase visibility.

**Engage your audience**
Boost interaction with your viewers by prompting them to share, comment and like your video. You can kick-start conversations by posing a question in the video description or running a contest that motivates viewers to share the video within their network.

**Track performance metrics**
Use analytics tools to monitor your video's performance, measuring aspects like views, engagement, conversions and ROI. Analyze this data to optimize your future explainer videos. For instance, if your video attracts many views but has a low conversion rate, consider revising your call-to-action or refining your target audience to improve results.

Creating a great product explainer video requires careful planning, strategic messaging and a keen understanding of your target audience. By following this detailed guide, you will be better able to produce a compelling explainer video that effectively communicates your product's
benefits and drives results for your business. With each video you create, you'll gain valuable insights and refine your approach, ultimately leading to more successful marketing campaigns and higher sales.
Video Done Right: Conferences

Video assets are crucial to enhancing the overall experience of a conference event for enterprise companies. Effective videos can significantly improve attendees’ engagement, understanding of the content and connection to your brand.

Here are the elements to consider in creating captivating video assets for conferences.

Planning the Budget

**Estimated range: $100,000 - $600,000**

**Budget percentage breakdown:**
- 15% project leadership/management
- 35-55% production (filming)
- 30-50% post-production (editing, graphics, color, sound, feedback periods)

Many factors can influence the desired budget for a conference event, including how many video assets you will produce for use before, during and after the event. Other factors include individual production scope; location logistics; talent and crew; post-production complexity; and distribution strategies.

Investing in pre-event videos can significantly boost awareness and attendance by generating excitement and previewing the conference’s unique offerings. During the event, high-quality video assets can elevate the attendee experience and reinforce key messages. Post-event videos can extend the value of the conference by maintaining audience interest, promoting future events and showcasing your brand’s expertise and thought leadership.

**Identify video asset types**

It's crucial to identify and develop a variety of video assets that will best support your event. Key types of video assets to consider:

- **Speaker introductions:** Pre-recorded video introductions of each speaker provide context and background, allowing attendees to better connect with the presenter and understand their expertise.

- **Topic introductions:** These videos provide a brief overview of a specific topic, setting the stage for the session or presentation that follows. They can help attendees understand the context, key points and relevance of the topic, making it easier for them to engage and participate in the discussion.
● Customer stories or case studies: These videos feature real-life stories from satisfied customers, demonstrating the value and impact of your product or service. By showcasing how your offerings have helped others overcome challenges, you can build credibility and trust with your audience.

● Product demos: Highlighting key features and benefits can create a compelling sales pitch and generate interest in your product. And pre-recording your product demonstration videos lets you cast your product in the best light, without risking performance errors or technical issues during a live demo.

● Animated motion graphics: These eye-catching visuals can greatly enhance the overall conference experience. Animated motion graphics simplify complex information and abstract ideas, making them more accessible and memorable. Integrating these graphics into a video can leave a lasting impression that boosts engagement, improves comprehension and creates a cohesive and memorable brand experience that aligns with your company’s visual identity.

Consider Event Space and Screen Utilization
When planning your video content, take into account the event space and the screens available for use. Thoughtful screen utilization can create a more informative and engaging conference experience:

Screen size and placement:
Determine the optimal size and location of screens for maximum visibility and impact, ensuring that all attendees can easily view the content.

Multi-screen coordination:
Design videos and graphics to take up wider space across multiple side-by-side screens or create seamless transitions from one screen to another, creating a dynamic visual experience.

Content strategy:
Allocate different types of content to specific screens, such as displaying event highlights on a central screen while looping sponsor showcases on secondary screens.
Pre-event Video Content

Pre-event videos are essential for driving attendance and awareness by generating excitement and communicating the value of your conference. By incorporating promotional trailers, speaker introductions, agenda overviews, testimonials from previous events and interactive invitations, you can effectively capture the interest of potential attendees and encourage registration.

These videos not only build anticipation but also highlight the relevance of your event to your target audience. As a result, you can attract a larger audience, enhance your brand reputation and maximize the conference’s return on investment, setting the stage for a successful event.

Post-event Video Content

Post-event videos play a crucial role in extending the lifetime value of a conference by maintaining audience engagement and promoting future events. By incorporating highlight reels, session recordings, key takeaways, testimonials and behind-the-scenes footage, you showcase the conference experience, reinforce your brand’s thought leadership and share valuable insights with a broader audience.

By prioritizing post-event video content, you foster stronger connections with your customers, partners and stakeholders, ultimately enhancing your brand reputation and maximizing the return on investment for your conference.

Craft compelling scripts

Compelling scripts are the foundation of effective video assets, driving audience engagement and clearly communicating your conference messaging. To create powerful scripts:

A / Define your objectives: Identify the key messages and themes of your event and outline the goals you want to achieve with each video asset.

B / Know your audience: Understand the needs, preferences and pain points of your target audience, and tailor your scripts to address these factors.

C / Be clear and concise: Use simple language, avoid jargon and get straight to the point to ensure that your message is easily understood.

D / Create emotional connections: Use storytelling techniques to evoke emotion, humanize your brand and build connections with your audience.

Well-crafted scripts result in more engaging and impactful video assets that drive audience interest, increase attendance and enhance the overall conference experience, ultimately leading to better brand perception and business outcomes.
Develop effective storyboards

Storyboards provide a visual blueprint for your video assets, streamlining the production process and ensuring that your creative vision is accurately translated on-screen. To develop effective storyboards:

A / Outline the structure: Break down your script into individual scenes or shots, and map out the sequence of events to create a clear narrative flow.

B / Visualize key elements: Sketch or describe the primary visuals for each scene, including characters, props, backgrounds and camera angles.

C / Incorporate motion graphics: Identify opportunities to incorporate animated motion graphics to enhance your message and improve audience comprehension.

D / Plan transitions: Determine how each scene or shot will transition to the next, ensuring a seamless and engaging viewing experience.

E / Collaborate with your team: Involve key stakeholders, such as your production team, graphic designers and content experts in the storyboarding process to gather valuable feedback and ensure that all elements align with your objectives.

Plan and Execute the Video Production

Pre-production

A well-organized pre-production process ensures that your video assets are produced efficiently and on schedule, minimizing potential delays and disruptions. Key steps include:

A / Secure locations: Scout and secure suitable locations for filming, ensuring that they align with your video objectives and visual style.

B / Obtain permissions: Acquire any necessary permits, licenses and approvals for filming at the chosen locations.

C / Coordinate with stakeholders: Collaborate with your event team, speakers and other stakeholders to align schedules, determine specific requirements and address any concerns.

D / Assemble Equipment and Crew: Gather the necessary video production equipment and assemble a skilled crew to execute your vision.
Production
A successful production phase results in high-quality video assets that effectively communicate your conference messaging, enhance attendee engagement and reinforce your brand image. Key elements include:

A / Filming techniques: Use a mix of formats, such as interviews, presentations and B-roll footage to create engaging and dynamic videos.

B / Lighting and audio: Ensure that lighting and audio are properly set up and captured, to ensure a professional look and sound for your video assets.

C / Script and visual alignment: Follow your script and storyboard closely, making sure that the visuals, audio and messaging align with your creative vision.

D / Flexibility and adaptability: Be prepared to adjust plans and adapt to unforeseen challenges or opportunities that arise during filming.

Post-production
A thorough post-production process results in polished, professional video assets that effectively communicate your messaging and leave a lasting positive brand impression on your conference attendees, ultimately driving business growth. Essential steps include:

A / Editing: Trim and sequence footage to create a smooth narrative flow that aligns with your script and storyboard.

B / Transitions and graphics: Add transitions, motion graphics and animations to enhance your message and create a visually engaging experience.

C / Sound design: Incorporate music, sound effects, and voiceovers to complement your visuals and reinforce your brand identity.

D / Review and approvals: Obtain feedback and approvals from relevant stakeholders, making any necessary revisions to ensure that your videos meet your objectives and quality standards.

Optimize Your Video Assets for Distribution

Formats and resolutions
Ensure your video assets are available in the correct format for the screens you will have during the conference. For content delivered before or after the event, employ various formats and resolutions to make them accessible on different platforms and devices.
Accessibility
Implement captions, subtitles or transcripts to make your video assets accessible to a diverse audience.

Summing Up
Creating captivating video assets for a conference event in enterprise companies requires careful planning, strategic messaging and a thorough understanding of your attendees' needs and expectations. By following this detailed guide, you will be well on your way to producing high-quality video assets that effectively support your event, engage your audience and reinforce your conference's key messages. Always be open to feedback, and use performance metrics to iterate and improve your approach for future events, ensuring continued success and impact.
Video Done Right: IPO Roadshow

Video is an essential tool for a successful IPO roadshow, enabling you to efficiently communicate to a broad investor audience with a consistent and compelling message. You can showcase actual customers to attest to your company’s value; bring your product or service to life using custom motion graphics to explain how it works and what it solves; and increase the clarity and retention of your overall message.

This video will be shared with your audience on the morning your roadshow launches as a precursor to actual meetings. It’s the best way to deliver the perfect presentation at scale, and it optimizes the results of the actual investor meetings.

Partnering with a video agency experienced in business and financial stories, like roadshows, offers significant advantages.

Here are the elements to consider in creating a compelling IPO roadshow video.

**Target Length**

As a distillation of a traditional roadshow pitch deck and presentation, the length of the film will likely land somewhere between 20-35 minutes. If you prefer to aim for a shorter runtime, additional preparation and a proper timeline for the project are keys to success.

**Budget**

These videos typically range in scope from $250,000 to $500,000, with exceptional cases above that range. But it is also possible to bring the cost down closer to $200,000, depending on your ambitions.

**Budget percentage breakdown:**
- 15% project leadership/management
- 35-55% production (filming)
- 30-50% post-production (editing, graphics, color, sound, feedback periods)

**Schedule**

A 12-week schedule is typically sufficient for a successful IPO roadshow video. The production process for an IPO Roadshow video comprises three main phases. The first 5 to 6 weeks are dedicated to **creative development and pre-production**, involving company research, scripting, logistics, scheduling, location scouting and rehearsals.
The **production phase** takes 1 to 2 weeks and focuses on filming executive interviews, customer testimonials, and B-roll footage. Finally, the **post-production phase** spans 4 to 5 weeks, including editing, graphic design, review and feedback sessions, color grading, sound mixing and the delivery of the final video.

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**Scripting Process**

**Story exploration and script development**

Making sure early in the process that you have the right resources and stakeholders in place. We suggest that you have the following resources ready to share with whoever is driving script development for the project kickoff. These include:

- The S-1 (a working draft is OK)
- Testing The Waters and/or investor deck (working draft OK)
- Brand positioning materials
- Relevant existing video content

The suggested stakeholders include a decision maker from finance and one from marketing, as well as your banking partner and IR partner (if applicable). It may also be helpful to have someone responsible for project management internally.

**Optimizing the story for video**

A strong agency partner can enhance the video script by focusing on the importance of language, visual and audio flow, and overall brand style and tone. This ensures that the video effectively engages the viewer, increases their understanding of the company’s value proposition and authentically represents the company's voice. An agency partner also offers valuable insights into story development, language selection, delivery coaching, atmosphere creation and visual reinforcement, ultimately improving the script in ways that are difficult to achieve otherwise.
Production Elements

Main interviews

Consider including up to six executives to showcase talent. Beyond the CEO and CFO, other leaders may have more intimate familiarity and enthusiasm for specific topics, which can significantly elevate the quality and authenticity of your message. Unlike a physical roadshow, a video allows you to feature these key executives without consuming their time or incurring additional travel costs.

Any executive being included in the video should plan appropriate time for reviewing and rehearsing their part along with time for being filmed and reviewing versions of the video leading up to final delivery for feedback. Working with an experienced partner can ensure the most efficient use of executives' time and prevent potential delays or disruptions in the production process.

Customer stories and testimonials

Incorporating customers is an effective way to reinforce your key messages and demonstrate the value your company brings to its customers. Videos that include authentic and compelling customer stories consistently receive the strongest feedback. You will want anywhere from 1.5 to 2 hours of each customer's time for filming. It is important to identify which customers and get their commitment as far in advance of your roadshow as possible to leave appropriate time for scheduling and approval.
B-roll

B-roll is supplemental or alternative footage intercut with the main shots. Incorporating B-roll of your products, services, team and office helps the viewer get the best understanding and feel for your value. It also allows you to avoid over-utilization of stock video that may give a wrong impression about the caliber of your business.

Motion Graphics

Motion graphics play a crucial role in roadshow videos, as they can effectively communicate complex or abstract concepts related to technology, business models, and financial data. An agency partner can create numerous high-quality, consistent motion graphics within your brand's aesthetic, ensuring a coherent and professional look throughout the video.

That's a Wrap

An effective roadshow video is essential to any successful IPO. Allow approximately 12 weeks for the process. And unless you have exceptional in-house capabilities, it makes sense to partner with a video agency experienced in this type of work. Experienced partners come with foundational principles on design rules and look-and-feel, which are invaluable when dealing with the scale and complexity of roadshow videos. By choosing an agency with a proven track record in investor-facing video communication, you can maximize visual comprehension and deliver a more compelling IPO roadshow video.

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