

Corporate Video & Brand Storytelling — Workbook

This workbook gives you the practical tools to apply every concept from the course to a real client project. Work through each section in sequence alongside the corresponding module, completing the exercises with an actual or hypothetical client in mind. Every template here is designed to be used on production day, not filed away.

The Corporate Video Landscape & Client Briefing

Use these exercises to identify a target client, define your service positioning, and complete a full discovery brief before any production work begins.

Exercise: Format-Goal Mapping Exercise

Think of a business you know — a client, a local company, or a brand you admire. For each of the three core formats, write a one-sentence rationale for whether that format would serve this business and at which buyer-journey stage.

- What is the business and what does it sell? Who is its target customer?

- Which buyer-journey stage (awareness, consideration, or decision) is this business weakest at, based on what you know about them?

- Which of the three formats — testimonial, explainer, or culture video — would produce the highest-value result for this business right now, and why?

- What success metric would you propose to measure the impact of that video in 90 days?

Worksheet: Client Discovery Brief

Run a discovery session with a real or practice client and fill in every field below. This completed form becomes the brief you send back for sign-off.

Client company name

Primary contact name and role

Video format recommended

Primary viewer (describe in detail)

Single most important message or feeling the video must communicate

Where will the video be published?

Who is the on-camera talent (role, name, availability)?

Success metric at 90 days

Brand assets available (logo, colour codes, fonts, music guidelines)

Deadline for final delivery

Budget range approved

Any legal or compliance restrictions on content

Checklist: Proposal Readiness Checklist

- Discovery session completed and notes taken
- All six brief questions answered (viewer, message, platform, talent, success metric, brand assets)
- Recommended format selected and rationale documented
- Three-tier pricing calculated and written into proposal
- Follow-up call booked for 24 hours after sending the proposal
- Proposal expiry date included (recommend 7 days)
- Brief document emailed to client for written sign-off before proceeding

Scriptwriting & Story Architecture

Apply the SB7 and PAS frameworks to write and get approval on a complete script or interview guide for your chosen video format.

Exercise: SB7 Story Mapping Exercise

Using the client and format you identified in Section 1, complete the seven SB7 story elements for your specific video project. Be concrete — use real names, real pain points, and real outcomes where possible.

- Describe the Character (customer) in one sentence: who are they and what is the single desire relevant to this brand?
- Name the External Problem (practical) and the Internal Problem (emotional) this character faces.
- How will the brand be positioned as Guide rather than Hero — what credibility or empathy does the brand bring?
- What is the three-step Plan the brand offers to move the character from problem to success?
- What does Success look like for the character after working with this brand — be specific with a before-and-after comparison?

Worksheet: Script and Interview Guide Draft

Write your script or interview guide in the two-column format below. For testimonial formats, write the PREP question set; for explainer and culture formats, write a full word-for-word script.

Format (testimonial / explainer / culture)

Estimated total word count

Estimated runtime at 130 wpm

VISUAL column — Scene 1 description

AUDIO column — Scene 1 dialogue or voiceover

VISUAL column — Scene 2 description

AUDIO column — Scene 2 dialogue or voiceover

VISUAL column — Scene 3 description

AUDIO column — Scene 3 dialogue or voiceover

VISUAL column — CTA scene description

AUDIO column — CTA text

Client sign-off name and date

Checklist: Script Quality Checklist

- Script read aloud — total runtime is within 10% of target length
- Customer is positioned as hero, not the brand
- There is exactly one call to action at the end
- No sentence is longer than 20 words when read aloud
- Every claim is verifiable (no unsubstantiated superlatives like world-class or industry-leading)
- Script or interview guide sent to client for written approval before shoot day is scheduled
- Interview guide sent to talent subject at least 48 hours before shoot with instructions not to memorise answers

Production: Shooting Like a Professional

Build your complete production package — shot list, call sheet, and a pre-shoot technical checklist — for the video project you are developing.

Exercise: Shot List Construction Exercise

Using your approved script or interview guide, build a complete shot list for your project. You should aim for a minimum of 15 distinct shots across interview, b-roll, and insert categories.

- List every interview setup you need (subject, location, camera angle) — each unique framing is a separate shot.

• For each section of b-roll, what does the viewer need to see to believe the story being told in the audio?

• What insert shots (product close-ups, hands, screens, documents) does this story require as evidence?

• Which shots are essential (story fails without them) and which are nice-to-have (enriches the edit but not required)?

Worksheet: Production Day Call Sheet

Complete every field. Send to all crew and talent 24 hours before the shoot day.
Project title and client name

Shoot date

Location address (full address including floor/suite)

Parking instructions

Nearest hospital or urgent care address

Director / lead videographer name and mobile

Client contact name and mobile

Crew member 1 — name, role, call time

Crew member 2 — name, role, call time

On-camera talent — name, role, call time

Equipment checklist (camera, lenses, tripod, lights, audio, batteries, cards, cables)

Day schedule: setup time

Day schedule: first interview call time

Day schedule: b-roll block start and end

Day schedule: wrap time

Checklist: Pre-Shoot Technical Checklist

- Location tech recce completed — power outlets, noise floor, light direction documented
- All camera batteries fully charged and backup batteries packed
- All memory cards formatted and capacity confirmed for the day's shoot
- Lavalier microphone tested with wireless transmitter — range confirmed for location
- Backup audio source (boom or on-camera mic) packed and tested
- Three-point light rig tested — all cables, stands, and modifiers confirmed working
- Shot list printed and on clipboard for shoot day
- Call sheet sent to all crew and talent

- [] Interview guide confirmed received by on-camera talent
- [] Client sign-off on script and brief confirmed before travel to location

Post-Production, Delivery, and Client Management

Use these tools to structure your edit, manage client feedback efficiently, and build the habits that turn a one-off project into a long-term client relationship.

Exercise: Paper Edit Exercise

Before opening your editing software, complete a paper edit by selecting and sequencing your best soundbites or script sections in writing. This exercise trains the discipline of story-first editing.

- Transcribe or summarise every interview answer or scripted section you captured. Mark each with: STRONG (must include), GOOD (include if time allows), or WEAK (cut).
- Lay out your STRONG selections in story order using the SB7 arc — does the sequence hold together without seeing any footage?
- Identify the three gaps in the audio spine where b-roll will carry the story without dialogue. What b-roll shot covers each gap?
- What is the very first 5 seconds of the video — audio and visual — and why will it hold the viewer's attention?

Worksheet: Client Revision Request Form

Send this form to the client with each cut. Ask them to complete one row per requested change. Accept the form back before beginning any revision work.

Video cut version reviewed (e.g. Rough Cut v1)

Reviewer name and role

Date of review

Change 1 — Timecode (mm:ss)

Change 1 — Current element (describe what is there now)

Change 1 — Requested change (describe what should replace it)

Change 1 — Reason / outcome sought

Change 2 — Timecode (mm:ss)

Change 2 — Current element

Change 2 — Requested change

Change 2 — Reason / outcome sought

Change 3 — Timecode (mm:ss)

Change 3 — Current element

Change 3 — Requested change

Change 3 — Reason / outcome sought

Any additional notes or overall impression

Checklist: Final Delivery Checklist

- Picture lock approved in writing by client contact
- Colour grade applied and checked against waveform monitor — luma within 16–235 IRE
- Audio mix: dialogue peaks between -12 dB and -6 dB; music at -18 dB or below under dialogue
- SRT caption file generated, reviewed, and corrected — proper nouns and product names verified
- Captions-burned-in version exported for social distribution
- Master file exported at required platform specs (confirm with client before export)
- All deliverables named clearly with project name, version, and date
- Delivery email sent with all files and a brief summary of what each file is for
- 30-day performance review follow-up scheduled in calendar
- Referral request email drafted and scheduled for delivery day

Your Action Plan

1. Complete the Format-Goal Mapping Exercise using one real or target client before your next business conversation
2. Schedule a discovery session with that client and run through all six brief questions — bring the Client Discovery Brief worksheet
3. Send the signed brief back to the client within 24 hours of the discovery call
4. Write a first-draft script or interview guide using the SB7 map you completed in Section 2
5. Read the script aloud, time it, and revise until the runtime is within 10% of your target length
6. Build the shot list for your project — aim for at least 15 distinct shots before considering the list complete
7. Complete the call sheet and send it to all crew and talent 24 hours before the shoot
8. Run the pre-shoot technical checklist the evening before — never the morning of
9. Complete the paper edit before opening your editing software on the first edit session
10. Send the Revision Request Form with the rough cut and wait for the completed form before beginning any changes

