

Documentary Filmmaking — Workbook

This workbook moves you through all four production phases of your first documentary: development, interviewing, observational shooting, and editing through distribution. Each section pairs directly with a course module and gives you exercises, structured worksheets, and checklists designed to be completed in sequence as you develop a real project. Work with a specific documentary idea in mind — the exercises are calibrated for that, not for abstract practice.

Research, Development, and the Documentary Idea

Apply the three-filter test, write your treatment skeleton, and build the character map and scene list that will guide every shoot decision.

Exercise: Three-Filter Story Evaluation

Apply the three-filter test (Access, Stakes, Visual Potential) to three documentary ideas you are genuinely interested in pursuing. Be honest and specific — vague answers will not help you make the right production choice.

- For each idea, describe your actual access: who do you know, what locations can you enter, and what would it take to gain access to the key people and events?

- Describe the stakes for your primary character in concrete, personal terms — what specifically do they stand to lose or gain, and why does it matter to them (not to you)?

- List at least three specific, filmable scenes that your story requires — where do they happen, who is present, and what occurs that a camera can capture?

- After applying all three filters, which idea scores highest across all three dimensions? What is the decisive factor that separates it from the others?

Worksheet: Documentary Treatment Skeleton

Fill in each field to build the skeleton of your documentary treatment. Write in present tense, as if the film already exists. Be specific and cinematic — describe what the audience sees and hears, not what you plan to do.

Opening image (describe the first scene in 3–5 sentences — world, tone, hook)

Central question or argument (one sentence — what does this film reveal?)

Primary character name and role in the story

Primary character's desire (what do they want?)

Primary character's obstacle (what blocks them?)

Secondary character 1 name and narrative function

Secondary character 2 name and narrative function

Act 1 summary (setup — 2–3 sentences)

Act 2 summary (confrontation — 2–3 sentences)

Act 3 summary (resolution — 2–3 sentences)

Closing image (describe the final scene — what does the audience feel?)

Intended run time (minutes)

Target festival or platform for first submission

Checklist: Pre-Production Research Checklist

-] Conducted off-camera pre-interviews with all primary characters
-] Built a paper archive of relevant news, records, and reference materials organized by character and theme
-] Created a one-page character relationship diagram
-] Identified and contacted the opposing viewpoint — have a plan to include it
-] Verified access to all locations required by the story structure
-] Written first draft of the treatment (minimum 3 pages)
-] Written the one-page pitch (logline, character conflict, visual world, audience, run time)
-] Researched any music, archival footage, or copyrighted materials you plan to use
-] Identified at least one potential co-producer, commissioning editor, or funding body

Documentary Interview Technique

Build a complete interview question set for your primary character, plan the on-set setup, and rehearse the directing instructions that produce usable, standalone answers.

Exercise: Question Architecture for a Key Interview Subject

Choose your primary interview subject and build a complete question set using the five-tier framework. Write a minimum of 30 questions before filtering.

- Write 5 rapport questions that establish ease and reveal biographical context — none of these will appear in the final film, but they should naturally lead toward your story.

- Write 8 narrative questions that ask your subject to describe what happened at key moments in the story — each question should invite a scene-length answer, not a yes/no.

- Write 6 emotional reflection questions that ask the subject how they felt, what they were thinking, and what they wish they had known — use specific time anchors ("the morning after," "the moment you signed").

- Write 4 contradiction or challenge questions that present a conflicting fact or opposing perspective and invite a response — these are your highest-risk, highest-reward questions.

Worksheet: Interview Day Setup Plan

Complete this plan before every interview shoot. Use it as a production checklist on the day.

Subject name

Interview date and location

Background selected (describe what is visible behind the subject and why it was chosen)

Camera position (distance from subject, eye-line placement, frame description)

Primary microphone type and placement

Backup recording device and method

Estimated interview duration (minutes)

Three most important questions (ranked by narrative priority)

Known sensitivities or topics requiring extra care

Directing note you will give before camera rolls (write out word for word)

Room tone recording plan (when and where)

Checklist: Post-Interview Quality Review

- All interview audio monitored through headphones during recording — no reliance on meters alone
- 60 seconds of room tone recorded in every interview location
- Subject given the complete-answer directing instruction before camera rolled
- At least three key questions asked from two different angles for editing options
- Silence technique used at least once — waited 5+ seconds after an emotional answer before speaking
- No yes/no questions asked on camera without rephrasing
- Backup recording verified to be running for all key dialogue
- Footage logged with timecodes, descriptions, and emotional quality ratings within 48 hours of shoot
- Subject informed of next steps and how they will be notified when the film screens

Vérité Shooting and Cinematic Observation

Practice handheld technique, build a location sound checklist, and develop the access arc and patience log that tracks your relationship with your documentary subjects over time.

Exercise: Handheld Camera Technique Drills

Complete these three physical drills with your camera before your first documentary shooting day. Each drill takes approximately 20 minutes. Review the footage critically after each drill.

- Drill 1 — Contact shooting: Record yourself walking through a cluttered indoor space while maintaining eye-contact through the viewfinder and keeping elbows tucked. Play back and count the seconds of stable, unusable footage. Aim for under 10% unusable in your third attempt.

- Drill 2 — Anticipatory framing: Ask a friend to walk from one point to another repeatedly, varying speed and direction without warning. Practice framing their destination before they arrive, not their current position. Review: how often did you lead the frame correctly?

- Drill 3 — Mixed lighting exposure: Find a location with both interior and exterior light sources. Set manual exposure for the dominant source and record a 3-minute sequence. Note: which parts of the frame are correctly exposed, and what is the acceptable exposure range for your camera in this scenario?

Worksheet: Location Sound Assessment

Complete this assessment for every documentary location before rolling camera. Identify problems and record your mitigation plan.

Location name and address

Dominant ambient noise source (e.g., HVAC, traffic, refrigerator)

Ambient noise level (dB SPL measured with phone app or meter)

Noise source: can it be eliminated? (yes/no — if yes, describe how)

If not eliminatable: describe the mitigation plan (repositioning, scheduling, lavalier use)

Microphone selected for this location and rationale

Backup microphone plan

Best time of day for lowest ambient noise (if applicable)

Room tone recording note (where and when in the shooting day)

Checklist: Access Arc Progress Tracker

- Shooting days 1–3 logged (Phase 1 — Performance): footage reviewed and labeled accordingly
- Subjects have been told the camera will be present on multiple occasions before Phase 2 begins
- At least one non-shooting visit completed per primary subject to build trust outside of filming
- Days 4–7 logged (Phase 2 — Tolerance): note which subjects are habituating faster than others
- Pre-roll discipline established — camera rolling 30 seconds before and after every anticipated scene

- [] Shooting without headphones for a session attempted — was audio unusable? Adjust discipline.
- [] Day 8+ footage reviewed for Phase 3 indicators — spontaneous behavior, camera-forgetting moments
- [] Footage log updated and emotionally scored within 48 hours of each shooting day

Editing, Structure, and Distribution

Build your paper edit, move through the assembly-to-picture-lock workflow with defined feedback checkpoints, and complete the clearance and distribution planning documents.

Exercise: Paper Edit Construction

Before opening your editing software, complete a full paper edit using this structured process. Plan for 6–8 hours of focused work.

- Print or export all interview transcripts. Read them in sequence with a highlighter. Highlight every line that could appear in the final film — aim for approximately 3x your target run time worth of material. After highlighting, write one sentence explaining why each highlighted passage is essential to the story.
- Open a spreadsheet and log every vérité clip with: clip name, timecode in and out, one-line description, emotional quality (1–5), narrative function (establish/event/emotion/theme/transition), and potential position in the story (beginning/middle/end). Aim to complete logging before touching the timeline.
- Write your scene-by-scene paper edit as a numbered list. Each entry: scene number, type (interview/vérité/archive/title), clip reference and timecode, what happens, and narrative function. Read it aloud when finished — where do you lose the thread?
- Share the paper edit with one person who has not seen your footage. Ask them: where does the story feel clear? Where do you want more? Where does it drag? Revise before opening the software.

Worksheet: Clearance and Rights Log

Document every third-party asset in your film and its clearance status. This log is required by broadcasters and distributors. Begin filling it in during development, not post-production.

Asset type (music / archival footage / still image / artwork)

Asset title or description

Rights holder name

License type required (sync / master / clip / fair use analysis)

Contact made? (yes/no — date)

License status (cleared / pending / rejected / fair use documented)

License cost

License territory and term

Documentation on file (yes/no — file name or location)

Checklist: Distribution Readiness Checklist

- [] Picture lock confirmed — no further picture changes after this point
- [] Final audio mix delivered at -23 LUFS integrated loudness (broadcast standard) or -14 LUFS (streaming standard)
- [] Color grade complete and exported at target delivery spec (DCP for theatrical / ProRes 422 HQ for broadcast / H.264 for web)
- [] Closed captions or subtitles created and synchronized
- [] Film poster (3:4 portrait) and key art (horizontal) designed at 300 DPI
- [] Festival submission list built with deadlines entered in calendar (FilmFreeway recommended)
- [] Clearance log complete — all third-party assets cleared or fair use documented
- [] E&O (Errors and Omissions) insurance application initiated — required by broadcasters
- [] ISNI or filmmaker profile on IMDb created and film page submitted
- [] One-sheet (sales document) prepared: logline, synopsis, director bio, stills, festival selections

Exercise: Feedback Screening Protocol

Run structured feedback screenings at the rough cut and fine cut stages using this protocol to get actionable editorial feedback from an audience.

- Screen the rough cut for 3–4 people who know nothing about your subject. Give no introduction — play the film cold. Afterward, ask only two questions: (1) Tell me the story of what you just watched in three sentences. (2) What moment in the film stayed with you most? Record answers verbatim.

- Screen the fine cut for a group of 6–8 people, including at least one person who knows your subject well. Ask: where did you lose interest or feel confused? Where did you feel most engaged? What do you wish you had seen more of? What felt redundant or slow?

- After each screening, wait 24 hours before making editorial changes — the impulse to fix everything immediately leads to overcorrection. Sleep on the feedback, then identify the 2–3 changes most supported across all viewers.

Your Action Plan

1. Identify three documentary ideas and apply the three-filter test (Access, Stakes, Visual Potential) to each — commit to the strongest within one week
2. Conduct off-camera pre-interviews with all primary characters before scheduling any camera shoot
3. Write a complete treatment (minimum 3 pages, present tense) and one-page pitch before production begins
4. Build a character map and a scene list using your chosen narrative structure (three-act, braided, question-driven) as your organizing framework
5. Prepare a minimum of 40 interview questions per subject organized by tier; practice the complete-answer directing note until it is fluent
6. Complete all three handheld technique drills before your first documentary shooting day and review the footage critically
7. Log all footage (interview and vérité) within 48 hours of each shooting day with timecodes, descriptions, and emotional quality scores
8. Build a complete paper edit before opening the editing software — show it to at least one reader who has not seen your footage
9. Run structured feedback screenings at the rough cut and fine cut stages using the protocol in Section 4
10. Complete the clearance and rights log for every third-party asset before picture lock — initiate E&O insurance application at the same time

