TRAINING VIDEO PRODUCTION HANDBOOK

free ebook

Studio Rossiter are experts at producing training videos. Learn from one of our head producers, Kevin Rossiter

Whether you're an experienced producer or a first time client, there's always something new and useful to learn about training video

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Introduction to Training Video Production

Great training videos make a difference to people's lives, and the organisations they work for.

Training videos, amongst other things:

> facilitate change in an easy way

> instruct in new ideas

> make life easier for customers and staff

> provide inductions for new people

> quite literally help save lives in the case of safety videos.

Every industry uses training videos, from retail to construction to manufacturing and commerce, and of course government, local government, universities, health services and all.

Training videos penetrate almost every working individual's life at some point or other, and often on many occasions.

And with the spread of training video, there has been increased viewer expectation.

Workforces demand better videos, like they demand better everything else in their lives.

The price of ignoring the workforce consumer's expectation is:

> sleepy audiences

> partial confusion over what is required

> slower take-up

The net result is less benefit to the business or organisation.

Then we find that safety rules get ignored at peak times, procedures get overlooked, customer are neglected or mistreated. Staff start to complain that they don't understand what's required of them, or that they can't fulfil what's required.

Yet the whole point of producing a training video was to ensure the training is well received, understood, and properly carried out by motivated individuals.

So how do we get there?

The aim of this short handbook guide to training video production is to assist clients and video producers alike in understanding the key steps to successful training video production, so that an effective result is delivered, whatever the industry, whatever the budget.

In it you'll find detailed information on how to plan and script, how to storyboard and shoot, and how to edit and post produce a video that will deliver for your organisation.

There are video examples to view at the training video gallery and other video sources.

Whether you're an experienced producer or a first time client, there's always something new and useful to learn about training video production.

A Personal word from the Author, Kevin Rossiter

I've always had a passion for producing great training videos.

Perhaps it's the challenge of producing something memorable that delivers real business benefit out of what are possibly the worst video sets in the world that does it for me? I don't know.

Unlike marketing video where the best of everything gets laid on, or television studios were set designers and wardrobe & makeup exist in abundance, or wedding videos where at least a church makes a great set, the training video has to be produced in noisy windowless factories, rainy dark yards, freezing warehouses, and brown-looking boring offices & call centres because, by and large, these are the places where most people work

Yet what goes on in these offices and factories greatly consumes and affects peoples' lives.

It is the job of the training video producer to bring this to life as a business training message, in a meaningful and impactful way that no one will forget in a hurry.

It's still quite a challenge.

Good luck.

Training Video Production Planning

Successful training video production is based on careful production planning.

This starts at the 1st Production Meet where the client and any other colleagues with a part-interest in the production (such as other trainers, tech specialists, IT, Marketing, Security etc) meet with the producer and scriptwriter (and possibly director) to agree:

> The objectives of the training video

> The overall creative style of the production

> What research needs to be carried out by the scriptwriter

> Key video content as bullet points

> A detailed production schedule to completion and delivery

It's best to use a flip chart and visibly write all these agreed details as they arise.

In addition:

> An anchorperson needs to be appointed on the client side to facilitate the flow of details during the course of production.

> The team should bond

> If needed, arrangements can be made for research either by the scriptwriter or director.

Subsequently, the producer or scriptwriter should write up these key points, particularly:

> Bullet point training content

> Production schedule

> Key creative ideas

If all the above is carried out, then the rest of the production becomes relatively easy as everyone knows what they should be doing, and when, and why.

The client should act as Location Manager, and walk through the location with script in hand prior to shoot.

Allow 14 days from storyboard to shoot for complex productions

Pre-shoot meeting to check preparedness

Training Video Script Writing

Script writing is the next major step in training video production and is considered a part of pre-production, along with research and planning.

Objectives

The objective of the script is to develop an Industry Standard Storyboard that:

> Achieves clearly written agreed business objectives

> Details for all to see what's required for the production, from voice parts, to cast to props, to shooting, to stills and graphics, as well as refreshments, food, rest area for cast & crew, and a Location Manager

> Is approved by the decision chain. This is vital as an incomplete training video script approval can backfire, with expensive consequences.

Delivering an approved training video script

Arrange a script meeting. Allow 1-3 hours for this.

Have all the key stakeholders attend

If you're the scriptwriter, guide the meeting by raising the bullet points and jotting down the comments, and statements from the team.

Once all the bullet points have been covered, close the meeting

Write the script in detail and submit it to the team for comment and approval.

Don't try and include every visual idea in the script. Stick to the voice or spoken word parts at this stage, with only broad reference to visuals.

Sticking to the video script will make it easier for you to write it, and easier for the client to approve it.

By contrast, trying to include every shoot detail, and point of visualisation before the core script ideas are approved is unproductive.

After 1 to 3 drafts, the script should be approved by the team.

Also ensure the other stakeholders (boss's boss, marketing dept etc) approve the script before moving onto the next stage of storyboarding.

Producer/Client Relationship

Ensure the client knows they will be involved at every stage. If you're a client, ensure you're involved at every stage.

Producers: Do not produce videos for absent clients, then ask them afterwards if they like the result. It's a recipe for disaster.

Clients: If you don't commit to full involvement then you may not get what you think you asked for.

On a positive note, due diligence and a good synergy between the commissioning client and the training video producer ensures that real training excellence can result.

Training Script Do's & Dont's

The script is the engine of the training video.

It is the single most important component

A great training video script even if supported by weak visuals can still result in a good video.

But a poor script and great visuals will almost always result in a weak less effective video.

When writing a training video script, use a 3 column structure:

• Column 1 to number each line, and specify what type of image it is, eg, if it's video or graphics or a still etc

• Column 2 to show the voiceover or spoken word, what is heard.

• Column 3 to show any storyboard intentions such as visuals, director notes, location pointers, etc

As the script develops to become a fully fledged storyboard, the 3 column structure can be retained and developed as more detail and requirements come on on board.

A collaborative document approach such as Google Docs, avoids everyone having separate script versions and subsequent confusion arising.

Audience Rule of Threes

Every individual in a workforces will need persuading.

You have to sell them on the idea of learning, and motivate them to be willing to adapt and change to new ways.

In a broad way, you can consider that:

• 30% will do whatever you ask of them – the Yes's

• 30% don't care about you and never will – The Naysayers

• 30% are open to persuasion – The Floating Voter

The rule is:

> Don't worry about the Yes's as they'll easily come on board.

> Ignore the Naysayers as you'll find it difficult to make a difference with these individuals no matter what you do.

> Focus your efforts on the Floating Voter, the individual who can be reasonably persuaded to adopt the new training idea or scheme of things.

The worst thing you can do is assume that people will want to learn simply because you've made them a training video.

This is where a great training script comes in.

It will talk to individuals at their level, applying their reasons, and be acceptable to their way of thinking.

It should relate not dictate.

Determining training script content

• Start by developing the script from the bullet list agreed in the 1st Production Meeting.

• Do this collectively as a group during the script meeting, then let the training scriptwriter finish it off in privacy.

• Keep to training objectives. Sentences that don't help deliver training objectives should be omitted.

• Less is always more.

• Tell them what you're going to tell them then tell them, then tell them what you told them.

Expanding on this:

The temptation is often there to provide unnecessary background detail on the training, typically where a managers wants to tell the story of the project (which is almost like putting your CV on the video).

Enthusiastic training video producers encourage this by suggesting the manager does "a talking head to camera" when this isn't necessary.

Avoid telling the story of the project and stick to the training objectives.

Voiceover Script Tips

When writing voiceover parts:

> Start each line from the key point. Don't lead up to the point, eg, XYZ is achieved by doing this, Not: Doing this will achieve XYZ. Don't make the audience guess.

> Always use simple English. No big words – ever. Dumb down.

> Word count: Allow 100 wpm to calculate runtime. Eg a 5 min training video is 500 words, and a 10 minute video is 1,000 words.

> Always use a pro Voiceover artist. Amateurs never deliver like a professional, no matter how "nice-sounding" their voice.

Vox Pops Tips

Vox Pops are series of fast interview clips, a key element in training videos.

They're usually an opportunity for the workforce to discuss a point, or training issue

Here are some pointers to ensure you get good interviewee responses for your vox pops.

> Start by producing a questionnaire that encourages individuals to discuss their training, or the new initiative.

> For any given question, offer 2 choices. Phrase it for both heart & mind, ie, What do you think of ...? How do you feel about ...?

> Most people will respond better to one choice, or type of approach, than another so always ask the question in the second way if the first way fails to get a good response.

> If a person rambles, yet still makes a good point, ask them to repeat the key point in a single sentence ... say that again for me please

> If a manager starts describing his/her job/role/responsibilities, stop them. Ask them to focus on the question from the audience's point of view.

> Don't let interviewees practice on you prior to shoot. Keep it fresh & spontaneous for camera

> Get interviewees to look at you by saying "look at the tip of my nose, not at the camera"

> Get a demographic mix of ages, genders, accents, ethnic backgrounds. Don't favour one particular group, or the other groups will tend to ignore you.

It helps to circulate the questions to interviewees in advance, so individuals have a chance to think about what they want to say in the training video, and generally feel comfortable about appearing on camera, which can be an unnerving experience for some.

Sample Guidance Notes for Interviewees

Here are some sample guidance notes which can be circulated in advance to individuals appearing in the training video.

Thank you for offering to help in the production of this training video. Your time is both valued and appreciated.

The programme is aimed at (insert objective here) on (insert location/places here). Your contribution will directly help towards this.

You should have been provided with a Questionnaire in advance, giving you time to think about what you might want to say while on camera.

You should feel free to answer honestly and in your own words. There are no right or wrong answers.

Similarly, you are not obliged to answer all the questions if you do not wish to.

You should also feel free to add more information if you think it's useful and relevant to explaining what you mean.

Arrangements will be made so that you should only have to wait for a short while prior to being interviewed, and that you are made to feel welcome and comfortable.

Refreshments will be available.

Talking Head Script Tips

Talking heads, or individuals directly addressing the camera (and therefore the audience) have to be used carefully.

The Talking Head needs to say things that carry the video forward, support the training objectives, and win the audience.

It's not like an opera where the storyline grinds to halt while someone sings.

A talking head has to propel the video forward, not bring it to a halt.

For this reason:

> For each talking head, get script agreed in advance. Specify as 50 or 100, or 150 words.

> If the Talking Head script is longer than 150 words, you need to ask serious questions. Why is the VIP spot this long? Audiences will grow bored unless something creative is planned.

> Be prepared to amend the script during the video shoot to accommodate the talking head's speaking style.

> It's always better to use a teleprompt (which can be hired if you don;'t own one) rather than rely on memory, or ad-libbing.

Actor Script Tips

Even if you only have small cameo drama sections, it's still better to use professional or amateur actors, than your own staff.

Areas where actors and drama can be used with great effect in a training video include:

> Demonstrating interpersonal skills, where the subtleties of how people interact need to be seen, not just talked about. For example, customer training videos.

> Describing how people feel about what they're learning, or adapting to. This is useful if a new procedure is controversial, or unexpected, and own staff are not available to talk about it.

> Re-enacting something that has already happened, where people need to understand the circumstances and the consequences. For example, and accident or incident in a safety training video.

There is no limit to the use of actors. Wherever people need to be on camera, you can use an actor or extra if you feel it'll better deliver the business message in a more professional manner.

Writing actor scripts

Every drama scene needs to have Anticipation, Action and Reaction.

These were Walt Disney's cardinal rules of cartoon animation, and they still apply to the production of many acting scenes today.

The pitfalls is to write too much in the Anticipation scene. It's too easy to write a mini-soap, with a great build-up to the main action point.

But this isn't what's required, even though it feels like fun to produce.

Training video production is about delivering training points so individuals feel motivated to comply.

It's not about winning an Oscar for a training drama.

So make the Anticipation brief, and focus on the Action and Reaction.

Training Video Storyboards

Objectives

To get great video production ideas that suit the material to be transmitted.

To develop the training script content into a working shoot document, complete with shoot details and visual indications

The Storyboard Meeting

The aim is to flesh out the training video script into a full Industry Standard Storyboard.

In its simplest terms, against every relevant phrase or sentence of training script you need:

- a description of what will be seen, whether video, graphic still or caption

- the location, if the image video. Or the source if the image is a still

- any cast or props required

- A time against each scene, eg Shoot Day 2, early am, or Shoot Day 3, late pm. Days are best broken in early and late am and pm, rather than specific times, as some shoots over run while others are filmed more quickly.

The Storyboard Process

This is now the time to firm up on your production choices.

For example do we want actors for a given part, or do you prefer voiceover. Or a vox pop. Or a talking head.

Consider the choices and determine the best mix

- Voiceover: An integral part of point and shoot.

- Voxpop driven: The workforce adding peer group influence to your training initiative.

- Talking head video: Using Managers and VIPs to present the ideas

- Captions: For titling, summaries, section headings, sub captions, and adding memorability to key learning points.

- Actors: Dramatising scenes will ensure they're remembered

- Presenter: An anchorperson to front your programme and deliver key info.

- Music driven caption: Text and music with stills is memorable. Use it.

When calculating your training video storyboard, allow a single day's shoot to deliver around 5-8 minutes finished runtime video.

The script writer will then write the storyboard up as an Industry Standard Storyboard

An Industry Standard Storyboard will include:

> Each line of video script separately numbered. These are the storyboard numbers and key to organising a successful shoot.

> Each numbered line of script will have detailed visuals and exact locations set against it.

> A Shoot List - an optimised route march of all the locations required for the training shoot, shown as storyboard numbers against location. This is for brevity

> A Cast List – details of all cast whether client provided extras, or hired actors. Specify by name and storyboard number

> A Props List -details of all props whether client or producer provided (eg a bin, a fork lift truck etc). Specify by name and storyboard number.

> A Graphics list – details of any graphic or caption sequence that a designer can review separately. Specify by storyboard number.

> A Stills List – details of any still photos or logos the client needs to provide. Specify by name and storyboard number.

It can be seen that an Industry Standard Storyboard is a comprehensive document.

It's more than a shooting script. It's also a complete bill of materials for the training video production, the book of the movie, if you like.

Shoot Planning

If the shoot is long or complex, for example if it has many locations or cast, then the client may require a separate Shoot Planning Meeting.

The client team may need this opportunity to finalise the logistics of the video shoot.

For example:

> Confirm all locations are available and suitable.

> Check availability of staff and equipment

> Check all managers in shoot areas have carried out any specified preparations, eg, cleaned the

area, warned others, etc

> Ensure a responsible person accompanies the video crew at all times

> Facilitate lunch, refreshments, and crew breaks

The producer/scriptwriter/director need not necessarily attend the Shoot Planning Meeting.

The client can often complete any omitted details on the storyboard themselves, or phone/email them through for the scriptwriter to amend.

Training Video Shooting

There are many books available to learn about using cameras and shooting video.

So we'll confine this section to tips that are specific to training video production, and assume that the basics of lighting and camera operations are understood.

I'm assuming basic camera and tripod operation, rather than steadicam, or motion camera, tracking and such.

Lighting/Filming/Directing for Training Videos

A common question is: "I'm interested in learning more about how I can make material that may be a bit 'dry' or boring even, into something more interesting on film."

In this first instance, a lot of training videos are dry and boring, or they are when you look at some of the training video productions found in circulation.

This is because the video crew often find themselves in non-descript locations, that are dirty, or scruffy, or look no different to the last video they produced, even though it was in a completely different office.

The solution lies in the hands of the video director.

The rule is that every shot can be made more interesting or improved in some way. No matter how dull the shot, there's always a small improvement that can be found.

In fact looking for big improvements in shots can almost be a mistake, as big improvements aren't necessarily going to be found.

They're simply not possible, either because of lack of funds, or poor quality of location from a film point of view.

As an integral part of training video production, I'd suggest having the following basic tools as a good start to improved filming:

- Portable TV monitor

- Green screen

- Teleprompt

- More than one light

- White scrim and coloured gels.

The following basic code of practice will guarantee an improvement in your shots. You can apply it to all training videos.

> Preview all shots on a TV monitor to check for dark areas, such as under tables, sides of cupboards, in the distance, etc. Dark areas won't do. They make otherwise great shots look poor.

> Shoot 2 angles of everything. This allows cross-cut editing for visual interest. Remember that while you're doing your best to add interest, so is the editor.

So help them by providing the footage for them to be creative at least in some small way. Do this with every scene.

> Never have the subject or the camera still at the same time. Always show some movement. Otherwise you might as well use a stills camera. And audiences find stills boring by comparison.

> Avoid wide shots, as nothing can ever be seen clearly from a distance.

Unless of course the long distance is deliberately creative, such zooming from high on a bridge to a subject on the ground, or overhead from a cherry picker or mobile platform.etc.

> Use more close shots as they generally deliver more impact. This is because you can clearly see the expressions on subjects' faces, and audiences will relate to this.

But be aware that generally camera operators are cautious of using close shots as they're more likely to go wrong if someone moves the wrong way.

The solution is to direct clearly and specifically ask for closer shots. Rehearse them while checking in your monitor til it looks interesting. Don't be scared of very close up shots. Your clear direction will give the camera operator confidence.

> Don't be scared of getting it right on first or second take.

Too many video directors are nervous and shoot too many takes. Too many safety shots early on means rushing to finish later on, which means creativity vanishes in the stampede to get the job finished before the client has to go home.

This is a typical training video shoot issue.

> As a director you have to be ready to pick up on other people's creativity.

This doesn't suggest departing from the planned shot list. It's more about being open to other ideas and interpretations.

A smart director knows that after lunch they're not so chock full of ideas as in early morning, and consequently looks around for people who are "on a roll" who can help. But don't argue over the creative. If you have to be firm creatively, say "this is the decision. Thank you".

Making Training Video Footage More Interesting

Always have a person or people in shot. Never just shoot "things". With a building, have people in shot. With a product, have people in shot.

This is because people like people.

Plan your shot first. Decide if you want to zoom, pan or tilt in advance. Then keep to your decision.

Witness the action as it unfolds.

Never have nil movement. If the subject isn't moving, then the camera should.

The commonest mistake is to shoot too many safe shots, where the camera operator shoots wider than is necessary, and loses the facial expressions and reactions of the subject in shot.

The rule is that if you're shooting somebody doing something, then get in there with the camera and let people see close-up what's happening. This is much more involving for the audience than long-distance viewing, and corresponding long-distance emotions.

Stick to the video storyboard that you spent a lot time planning, and that the client agreed to. Don't add new things, because usually there's no need to do this, and it wastes time and creativity.

If you've developed the storyboard professionally, you will have already referenced all the shots you need.

Use a preview monitor to check for dark areas in the picture. It's a common mistake to see a perfectly good action shot marred by an unobtrusive dark area. This is usually caused by using the camera viewfinder only.

In fact, it's advisable to use a preview monitor as often as practical.

Good training video footage comes from getting lots of little things right, as a habit.

To Shoot Training Demonstrations

First shoot the whole scene as an "establisher", a wider shot.

Repeat the shot with closer view.

Repeat again on eyes, then hands, or tilt eyes to hands.

Then repeat again from a different angle.

This approach will:

> allow the video editor to cut the training scene to any timeline length, to fit the voiceover, music jingle or whatever.

> offer greater visual interest, as the edits switch seamlessly from view to view, involving the audience in the training to a much greater level. A simple demonstration of someone opening a door can employ 6 edits, if the footage is there in the first place, ie, 6 cuts have been shot.

Shooting more cutaways is always a sure sign of a more polished training production.

Even the dullest of industrial scenes will look better with lots of intercutting of views of the demonstration.

Video directors play an important role in this style of shooting, as they can watch the scene on a preview monitor, and better gauge how tightly the scene can be shot, advising the camera operator accordingly.

Bringing Training Scenes to Life with Lighting

This is what lighting does. It brings training scenes to life.
Lighting operates on different levels.

A single light will lift a scene, and cheer it up.

A single light with a white scrim gauze bounced off the ceiling will look more natural and less harsh.

Backlighting a subject will make them glow, and look more appealing. This has to be done with great care, or it looks wrong.

Perhaps the best light of all is the Fill light.

This is a light aimed at the background not the foreground of the training scene.

It really makes a scene come alive and vivid with colour.

If the scene is in an industrial location or otherwise not so good to look at, or if the scene is a boring brown-and-beige office, then use a coloured gel on the Fill light.

Yellow gel on a fill light will cheer up a training scene without looking over the top.

Scenes can be contrasted by using different coloured gels, say, pink.

But don't overdo it, or things will start to look unnatural and sci-fi, especially overuse of green or violet.

Dealing with Talking Head VIPs in Training Videos

Talking Heads deserve a whole section on their own, as the success of the video production can hinge on how well the talking head(s) perform(s).

Talking heads used in training videos can include:

> CEOs and Managing Directors

> Other Directors

> VIPs

> Managers involved with the training or production process

They are used in a number of ways:

> To introduce a training topic they have a personal interest in.

> To endorse a training topic and show support from the top.

> As part of a series of talking heads discussing and developing a training topic.

Their function in the training video should be a genuine function that propels the story forward, and helps the training message evolve. It isn't simply an honorific for the project's paymaster.

Please see the section Talking Head Script Tips for more info on this.

Arranging the video shoot with a VIP

> VIPs are busy people. Your training video production is a small item on their agenda. So don't expect too much from them.

> Expect them to be agreeable to the shoot, but difficult when it comes to picking a time, date & location.

> Never finalise video shoot dates until the VIP shoot dates are agreed.

> Always arrange to use teleprompt. Expecting busy people to memorise lines will result in embarrassment all round when they fail to get it right. You can easily end up doing endless exasperated takes if you rely on the talking head to memorise lines and then perform like a pro.

When on set with a VIP

> Ensure the camera operator stays quiet and only the Video Director does the talking. Only one person talks. It's easier, and builds confidence in the VIP who may actually be quite nervous under their calm exterior.

> No spectators. This is private. So if the VIP blunders on lines, then it doesn't matter as it's private not public.

> Shoot standing up for improved voice projection

> If you're shooting head and shoulders, then encourage them to accentuate their head movements, nodding or inclining their heads to accompany each point they make. Get them to say it with their heads.

> Encourage them to avoid moving hands, unless you're doing wide enough shots to include hands. Even then keep hands within a prescribed range, otherwise the hand pops in and out of shot.

> Start the session at a slower rate, with slower speech, while they get used to it. They will probably want to change the training script on the way to suit their natural manner. This is fine with teleprompt.

> Build up to faster takes. End on a Loony Take where they exaggerate. This will pay-off.

> Expect to do 5 takes. Often the loony take is the best one.

> Use a light. The camera shutter can open more, with improved depth of field. And the subject will look better too.

If a teleprompt is not available, eg, when outdoors, then shoot in the following way:

> The VIP will get the memorised lines wrong or say them differently every time. Expect this.

> Start the shoot head and shoulders wider

> Let them speak to camera until they forget, swallow, splutter, or make an inappropriate gesture

> Reset the camera lens to closer, then get them to continue from the point they last made, but closer.

> When they next forget, reset the focus to wider, then continue from the last point, with a wider view.

> Carry on like this, resetting from wider to closer each time they get it wrong. Wide-close-wide-close and so on.

The video editor will be able to cut from wide to close, wide to close, editing out the bad takes or the forgetting-points.

The finished edit will look smooth, like it was always intended to be that way.

You can further support this with overdub shots of the VIP to hide the joins in the edit. For example, VIP meeting colleagues, VIP walking business-like through a smart reception area, VIP conferring with a manager, shirtsleeves, again in reception.

One question that is always asked is "How can I help the VIP come across in a relaxed and engaging way?"

The most obvious answer is to be professional in your approach, comfortable and easy in the way you handle the equipment, and keep the dialogue to only Director & VIP, rather than a general free for all conversation.

After each take, let the VIP view themselves in the camera viewfinder or portable monitor with headphones on.

Say something good about their delivery when they've finished doing this.

You build confidence in each other with this approach, and the takes get better.

VIP background sets

These days it's better to shoot against a green screen, and dub in a suitable background during post production.

Gone are the days of the "MD and potted plant".

If you can't shoot green screen, then a busy reception area is often better, as it looks alive.

If reception is poor looking, then find a meaningful area onsite that will be recognised. For example VIP by a safety board in a health & safety video, or by a clearly smartly signed entrance.

Actors & Artists in Training Video

Actors allow you to include dramatic scenes and really liven up your training video.

They can:

> Act out parts instead of staff

> Act as presenters to host the programme, and guide the audience through.

> Get better performances out of your ordinary non-acting staff who also participate in the production of your training video.

> Play vox pop parts instead of staff, using scripts based on audio recordings with real staff who are unavailable to appear in camera, due to shifts or unwillingness.

Hiring Actors – Tips

Getting value from your production budget matters, so sourcing actors and getting the best out of them for the best price is an important part of the job.

> Local amateur dramatic society members will often work for free. If they charge they're reasonable at maybe £150 pd all in, and maybe £50 for extras

> A professional local actor can often organise the cast you need from friends they have in the profession. This makes it easy for you. They may charge 15% over and above all fees. Or they may not!

> Professional acting agency can charge £350 actor, £650 pro presenter, per day plus travel. These are guide prices. It varies. If your production budget is small, tell the casting agent. They'll still help.

> Allow actors a week to learn their lines. Don't make script changes in the final week, or the cast are likely to make mistakes. They might say they can learn lines at the last minute, but it's wise to avoid this scenario.

> Take your actors' careers seriously. They do, so get in step with their view on their career.

> In future, drop anyone who can't a) learn their lines properly b) instantly turn on their talent when on camera c) avoid delaying the shoot for any reason.

> Explain their motivation to them. Give them background to the character, no matter how small.

Actors may appear blase and overly competent, but they will appreciate your efforts to build their character's personality for them, even if they don't admit to this.

> When praising, praise extravagantly – but always be sincere. Find what they did that was good, then say it loud.

> Use professional extras where possible. You can mix a pro extra in with amateur staff for £50 per day, and get a settled, more motivated cast.

> Use an acting agency if you have no contacts. You'll pay £300-£500 per day for television experienced actors who are relatively unknown.

> TV presenters can charge in excess of £1,000 pd, even the not very famous ones. The semi-famous ones will charge maybe £2,000 or more. Consider carefully if you need a "name", when a good actor doubling as a presenter will do the job fine. It's a training video, not a Hollywood blockbuster.

> Look for unknown talent. It'll pay, as good quality "unknowns" often work very conscientiously for less money while they're still building their careers. And their expenses cost less than big names with taxis, hotels, and wines!

> When selecting a presenter for a training video, look for wholesomeness as the main quality. It's hard to say exactly what wholesomeness is, but it's a quality that will reach all corners of the audience.

The dangers of a presenter with "too much personality" or too much slickness, are that they can alienate segments of your audience, even though other segments love them. A good presenter will never seem like they're trying, yet everyone will like them!

Voiceover Artists

Great voiceover artists make a phenomenal difference to a training video production.

You should involve your client in this choice, playing samples from different productions you've made.

It's possible to let the client pick from a voiceover website, but you have to be careful, as they can pick people who are one-trick ponies, or don't have their own studio, and other negatives you need to avoid.

Offer a choice of one or two male and female voices, and most clients will feel quite happy that you've consulted them.

Their is no rule as to whether men or women make better voiceovers though, interestingly, the author has found that women often choose a male voice, while men prefer a woman's voice!

Voiceover Objectives

To deliver a compelling voice narrative for your training video production

To be able to make small changes free of charge that the client may want, after the main editing is complete

Pointers

> Pro voiceovers cost £250+ per session, which can be from 5 mins to 30 mins runtime

> Only use voiceovers with their own recording studio.

> Where poss direct the session over the phone. The VO artist needs an ISDN connection for this.

Don't let a voiceover you are using for the first time do the session without you listening in to direct. Too many things can go wrong, eg, mispronunciations, wrong emphasis, wrong tone or tempo, wrong anything.

> Ask for different interpretations of key sections if you want, eg, slower, faster, more relating manner, flatter vs more impassioned

> Offer the client a choice of male or female

> Ensure artist will do small amends FOC

The author's preference for training videos is to use a voiceover with a "relating, sensible-sounding" voice. Newscasters should possibly be avoided if they sound too bossy and direct.

Likewise too much compassion can sound like the training topic is something to avoid. You can also choose between "more posh" or "more street".

But remember that you're always looking for maximum appeal for your training video.

Graphics in Training Videos

Graphics can play a massive part in lifting the quality of any training video production. Use graphics and design whenever possible.

Where and when to use graphics when training

There's no limit to imagination when graphics can be used. The following are a start.

• To explain training items that can't be seen, such as a mechanism, a flow chart of events, a timeline clock, a process overview, etc

• To caption bullet points where the visuals are poor, such as amateur photos, or where the training content is dull and needs cheering up.

• To caption summary sections to reinforce the learning points. Captions over reprised footage is fine here.

• To add titles and section headers, allowing the viewer to compartmentalise the training information, structure it in memory, and so recall it better when on the job.

• As backgrounds to VIPs who've been shot against green screen.

• To provide an overall thematic unity to the production. This shouldn't be overlooked. A great graphic theme looks great in any training video. Likewise training productions without a graphic theme often look ordinary and dull.

Using 3D animation in training

3d animation realistically creates events that have previously happened, such as an accident in a safety video.

The causes of a fatality can be seen in detail, as well as the events in the actual incident.

3D animation lets you do this without having to recreate a horror movie which is offensive to many, not least the victim's family.

3D animation will also accurately recreate the internal mechanism of a machine, or piece of production that requires training and competence.

The commonest use of 3D animation in corporate video is in the construction industry where 3D

fly-through animations are produced to help a body of client understand a property developer or architect's intentions with a proposed new building or built environment.

3D is expensive stuff, as it takes weeks to model, animate and render scenes in a realistic way.

All 3D animation can be greatly improved if care is taken to set it against a realistic soundtrack, eg, music, voice, ambient noise, sound fx. If you want this, expect to have to do it yourself. Don't look to the animator for this.

3D will elevate the training video content if you use it well.

Sound in Training Videos

Sound matters in any video, not just training. And the good news is that you can do a lot on your own with only a small amount of kit.

The objectives of the soundtrack in training video production

> So the audience can hear the learning points they need to hear

> To enliven dull sections of the training programme

> To make scenes feel live, as if you were there, involved in the actual training

> To mix with music and voiceover, forming a realistic panorama of sound.

When recording sound on set

> Use a boom mike for recording groups of people, or more than one person.

> Use a tie mike for vox pops and talking heads, wireless or hard wired.

> The Camera Operator should always do a sound check for levels.

> The Video Director should wear the headphones, leaving the Camera Operator free to focus on the visuals.

> Be prepared to use noise reduction software later, as many training video locations have unavoidable background noise. Today's noise reduction software is easy to use, cheap, and is very effective at cleaning up bad sound.

> Always record wild sound from the camera mic as a backup. The editor may also later wish to add a little wild sound, adding an ambient level of background noise that reduces any feeling of lifelessness.

> Always ensure silence on the video set during recording. Don't tolerate chatting. "Silence on set, please"

For recording training drama, or where there is more than one person speaking at the same time, you'll need to employ a sound recordist, who will use a belt audio mixer to set levels for a variety of mikes.

Besides obvious sound skills, look for a sound recordist who is relatively unobtrusive and quiet. Chatty sound recordists can offer one creative idea too many, when it isn't necessary. When the sound recordist starts to chatter, then "everyone starts to become a director" which can get chaotic, waste time, as well as upset some people.

Expect to pay £200+ per day or more for a professional sound recordist to come out to an industrial training video location.

Safety in Training Video Production

Neglecting safety on a video shoot is something no crew should ever do, or director ever permit.

The primary objective is to ensure no one gets hurt on a video production, or that there are no near-misses.

Your job is to minimise risk & prevent injury

Here are some pointers:

> Use yellow tape on trailing floor cables

> Avoid making trip hazards, eg, tuck cables out of walkways and stairs.

> Have a helper holding lights, so no one can accidentally knock a light over.

> Use Hivis clothing and PPE where rqd, such as harnesses for high-up shots, safety glasses or ear muffs or safety gloves in industrial areas, hard hats when people or cranes work overhead.

> Make safety visible so everyone on the video set gets the idea

> It's good to brief the video crew on the risks. And be prepared to have a "quiet word" with anyone who ignores safety.

> Plan locations in advance so no last minute unsafe shots are called for, eg, unexpectedly working from a height of 2 metres or more.

> Get public liability insurance for at least £1,000,000 GBP

> When in doubt consult the safety responsible person for that area first. Don't guess.

> Besides hurting someone, an accident will cost you endless hours of paperwork and interviews. Be safe. Make safety paramount throughout your training video production.

Editing & Post Production of Training Videos

Like the shooting section, this is not an editing tutorial. It's about getting more out of your editing, so your training videos look and sound better.

Much of the magic occurs during editing and post production stages.

Here is a sequence of events that many studio editors use as their core workflow model when producing a training video.

> Grade the footage, label and sort it into scenes and categories.

> Quickly Edit an End-to-End version of the training video. This will be very rough, so don't worry about mistakes. It will give everyone an idea of what's emerging, and see the shape of the video.

> Consult with video producer/director, ie, show them the End-to-End version. Note: This is not for the client to see yet, only the video producer and/or director/designer.

> Edit to Rough Cut. This is a virtually completed version of the training video. Almost everything will be in place – graphics, sound, edits. But possibly not the parts that require a lot of rendering time, such as image colourising or special visual effects.

> Show the Rough Cut of your training video to the client. They will make amends, but they shouldn't

really need to make suggestions outside of the approved storyboard.

> Edit the client amendments, and complete the post production, eg, effects, colourising, animation.

> Stream, upload or post the completed version to the client for final approval, which should be a formality, or a last minute check at the most. Any changes at this stage will be tiny.

> Deliver as DVD, .wmv and .mp4, as all three formats will be needed.

Here's how the different video formats are used after the training production is complete:

DVD: A disk to be played from a DVD player, or PC.

WMV: A windows media video file for inclusion in powerpoints, or for fast download, and convenience.

MP4: A high quality video file format suitable for video streaming on a website or intranet.

Dealing with clients who want to make too many changes at the last minute

This shouldn't really happen if all the other production steps in your training video have been adhered to.

You have to ask:

> Why have they diverged from the agreed storyboard?

> Have new clients with fresh or different ideas come on board halfway through the project?

> Has everybody been "excessively creative" as the job progresses. This is mostly unnecessary. The video script and storyboard are there as the correct outlet for planned creativity.

Good project management skills ensure the final training video production mirrors or exceeds the client's original intention.

Interactive Training DVD

Interactive DVD has taken now training video production into the area of multimedia programming, where any video studio can now look as good as Hollywood.

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As before, this isn't an interactive DVD programming tutorial, but there are useful pointers on how interactivity helps training videos meet training objectives.

Let's start by restating: Interactive DVD software will allow you to make training DVDs that look and feel as professional as anything from Hollywood.

This means that with a little practice, and some design assistance, you can produce top notch DVDs.

The first option is menu-driven modules.

Many training video productions benefit from being produced as a series of short modules, perhaps with an additional Play All option.

Even if you're new to it, learning to programme in a menu isn't too difficult with software like Adobe Encore.

If you're short on graphics ability in-house, find a local web designer who can quickly develop a tidy design for you, without you having to spend too much money outsourcing.

Before long you could be mastering great looking menus that elevate your training productions, and make them more useful to your clients and their workforce audiences.

Another option is using interactive quizzes to validate the training, the learning received.

The simplest way to do this is to have a menu option The Quiz, or similar.

The viewer can navigate through a series of multiple choice questions that cover the key training messages. Correct answers take you forward, while Incorrect answers can either:

> Display the correct answer/choice

> Take you back to the specific training module where that information was first learned.

What interactive training DVD can't do is remember scores, or write results to a database.

DVD players don't have the brain for it, though I've heard of (but not used) software that is supposed to extend functionality by making use of the RAM in the DVD player.

Generally interactive quizzes are suited to one-on-one training, or groups of trainees in remote locations (shops & stores, other plants) using a paper based workbook, with manual entry follow up.

While this doesn't have the bells and whistles of a professional e-learning system, it does look impressive in the classroom, and ensures the learning is delivered as a complete all in one package.

One client I know even has three different versions of his quizzes so trainees don't all get to learn the answers in advance.

The point is that interactive training DVD will maximise the value of any training video production. So use it.

Duplicating Training DVDs

Pre-duplication of your training DVD you'll need to arrange:

- On-body art work

- A master DVD

- A cover design, with training notes.

- Perhaps an insert with a questionnaire or pocket sized learning points, or guidance notes for trainers.

It's better to spend a little more to get professional design assistance if you don't have this in-house.

People judge a book by its cover. And while your training video may be brilliant, no one will know this if it's packaged in a tacky box with a bare text label, or nasty looking screen grab photograph.

There are so many duplication houses available on the web, publishing their prices online, there's no need to look any further.

The main point to watch out for is this:

If you get it wrong with your ordering you might still have to pay for the 500 interactive training DVDs you ordered even though they're all wrong in some way.

In this event, you might prefer a duplicator who has a phone system that allows you to speak to a real person if you're unsure, rather than an online form, or "press 1 to speak to a technician, press 2 to speak to sales etc" low cost phone setup.

You might pay a little more for service and comfort, but you'll avoid expensive mistakes.

Training Video Production Ideas

Here are few ideas to get your started down the road to successful training video production.

Obviously, these are intended as ideas to get you started rather be slavishly copied.

Feel free to mix and match ideas as you feel is right.

Voxpop Training Video

Why use voxpop videos in training?

> You can gather a lot of runtime video footage in one place in a relatively short time.

> Peer to peer group influence really works when it comes to extolling the training message, and adding credibility to a production.

> Voxpops can be really exciting to watch if they're edited well.

> You can do all of the training video as voxpops, or just a part of it. It's nice to have this choice – so choose.

> A voxpop section will liven up part of a video by opening up the training initiative to workforce discussion.

What you need to do to shoot great voxpops

> You need at least 8 interviewees. 12-20 interviewees is fine. 3 to 5 interviewees is almost a waste of time.

> 8 or more interviewees will give the video editor a much wider choice of responses, allowing them to be interesting and creative instead of stuck with a handful of second rate speakers.

> 8 or more will allow you to represent an accurate workforce demographic, ie gender, regional accent, ethnicity, age.

> Understand the importance of honouring interviewees. Treat them like VIPs. Make they feel proud to have helped you. Look after them with refreshments, drinks, seating, courtesy, etc

> Send out questions in advance – see Guidance Notes for Interviewees and other voxpop tips earlier

Allow 10-20 mins per interview

Queue them up. Let queuing voxpops watch the others and learn what's expected of the training video.

Keep moving the camera left and right between interviews (not during)

Keep moving camera round 90 degrees after each batch of interviews.

Don't frighted of using "wobblycam" on-the-shoulder during interviews, or high and low contrasting shots. But whatever style you choose for your training video, stick to it, or it'll tend to look odd.

Make use of the 16:9 letterbox screen to get useful background in the frame.

Feel free to do two person shots, ie, 2 interviewees together.

To make sure they project well, you'll need to:

> Get them to stand unnaturally close together. It looks better even if they think it feels weird.

> Get them to look each other in the eye and smile before the interview. Make them bond as friends first.

> Encourage them to pay attention to each other's answers, and not ignore each other.

Workforce Motivation Video

Organisations go through changes together, often against a backdrop of problems and difficulties (redundancies, job description issues, etc).

This is often the very time when the organisation wants to introduce new systems, or train and develop new attitudes.

For this to succeed, workforce motivation is needed.

Often a new training video is commissioned to help achieve these objectives.

Here is a formula that works.

The basis is to combine Talking Heads and Voxpops

It goes like this:

> Get a company director to briefly spell out the initiative, or part of the initiative. Do this in less than a minute.

> Follow up by voxpops discussing the initiative

> Get another director to add more, to develop the initiative, ie, develop the training theme

> Follow up with more voxpops with more discussion

> Continue with a series of short director-to-camera talking heads followed by voxpop discussion amongst the workforce.

> Dub over relevant video footage to illustrate the training point as appropriate.

Key Point: Voxpops will not say stooge lines. But with insightful questions, and personal encouragement they will deliver some brilliantly original lines that no scriptwriter could have thought of.

The net result is a carefully edited video version of the changes management want to happen, and how they want the workforce to view these changes.

But, it has to be genuine.

While any training video production is a credible illusion, the company needs of core of genuine workforce support for it to work.

Keep to this, and more people will be motivated for change than would otherwise be.

Increasingly workforce motivation is the top item on the business objectives for a training video.

Behavioural Safety Video, or Hot Issues video – Newsdesk Style

Behavioural safety, or other Hot Issues, account for a lot of training videos these days.

Using a Newsdesk style will set your training video apart, and make audiences take notice.

Style description: We see CNN/BBC Newsdesk with a Director or VIP or professional presenter as the news anchorperson. The presenter then refers to different areas within the organisation where there are hot issues, with camera cutting to show the problems, closely followed by the correct training solution.

This style is very flexible as it can include almost anything you want. All it takes is hot issues.

> Adopt a newsdesk approach complete with a VIP as "television news presenter"

> Shoot the presenter against green screen, full length and waist-up, as well as close.

> Ask a graphic designer to develop a newsdesk style background. If they watch a few TV news programmes they'll quickly get the idea.

> Key the presenter over the graphic background, and add captions as appropriate.

> Cut to location reports at scenes of hot issues, or the scenes of accidents/incidents

> Get voxpops to describe hot issues/incidents, and the correct training approach.

> Film training demonstrations of the correct approach.

> Cut back to "studio" to presenter anchorperson, and begin again with the next training element in the hot issue.

> Wrap it up with a summary of the key learning points.

IF YOU'D LIKE TO KNOW MORE:

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