

## **CLIENT RELATIONS THINGS TO REMEMBER**

**When consulting, let the client talk!**

**Don't promise anything beyond your known capabilities.**

### **Manage expectations**

- Explain the various steps involved in the production, from start-up to delivery, and what happens at each step (might consider giving client a "process sheet.")
- Have an up front discussion about how you will work together and the degree of participation the client will have/want at each step.
- Outline the deliverables and be clear about what to expect at each deliverable, and the degree to which you can accommodate change at each of these stages.

**Make sure you get sign-off at each step.**

### **When preparing the cost estimate:**

- Include all direct costs (couriers, duplication, etc.)
- If need royalty-free music, remember either to include time spent "composing" loop tracks, or to include fees paid for royalty-free music.
- Build in a contingency amount or management fee.

**Client Contact:** \_\_\_\_\_

**Production:** \_\_\_\_\_

## Start-up Meeting

WHY DO YOU WANT A VIDEO AND HOW DO YOU SEE IT BEING USED?	
WHEN IS THE (event/wedding/other) TAKING PLACE?	
WHEN DO YOU NEED IT?	
WHAT DO YOU SEE AS THE (company/person/wedding/event) STORY?	
WHAT WOULD YOU SAY IS THE MOST IMPORTANT PART OF THIS STORY? (and prioritize events/elements)	
WHO IS THE INTENDED AUDIENCE FOR THE VIDEO? What will they most be interested in?	
WHAT DO YOU HOPE WILL BE THE DESIRED EFFECT? (What response do you want to get from your audience?)	
HOW DO YOU WANT THIS STORY TO LOOK AND FEEL? (e.g. warm, professional, upbeat, thoughtful, human, with humour)	
HOW WILL IT BE SHOWN? (e.g. on television, website, large screen presentation)	
WHAT VISUALS ARE TO BE INCLUDED? (e.g. original footage, photos and other archive material?)	
WHO NEEDS TO BE INCLUDED IN THIS VIDEO (as interviews and/or as part of the scene, etc.)	
WHAT KIND OF BUDGET DO YOU HAVE FOR THIS PIECE?	
WHO IS THE PRIMARY DECISION-MAKER FOR THIS VIDEO?	

(Who will be the one to sign-off at each stage?)	
IS THERE ANYONE ELSE WHO SHOULD BE INVOLVED IN THIS INITIAL (and other?) CONVERSATION?	
WHO WILL BE MY PRIMARY CONTACT? Will they supply any needed bg info? (logos, photos, etc.)	
WILL WE NEED TO GET APPROVALS/CONSENTS? (and who will be responsible for getting these?)	
VENUE: Type of building (Church? Community Hall? Office? Factory? Government? Etc.) Location(s) Capacity: How many people will be there? Will there be room for (x) equipment, lights, crew, etc.? Are there restrictions I need to be aware of? (e.g. venue doesn't allow certain things; only open between certain hours, etc.)	
REQUIRE SHOOTING SCRIPT? (Can depend on time and budget and purpose, e.g. is film to capture experience and then tell story of what happens, or is film to illustrate a known phenomena.)	
REQUIRE EDIT SCRIPT? (and require final revised edit script?)	
(IF PRODUCT TO BE DVD) HOW MANY COPIES OF THE DVD WILL YOU REQUIRE?	

### **Then, go away and**

1. Type up your notes and send them back for sign-off. Make sure you haven't left anything out and that there seems clear understanding of the points to be covered.
2. Prepare the cost estimate.
3. Provide timelines for deliverables and
4. provide fee schedule establishing your preferred payment plan.