

THE VIDEO STRATEGY WORKBOOK

Plan smarter. Create with purpose. Make content that works.



This workbook is designed to **help you get the most out of your next video**—whether you're working with us, another team, or even DIY'ing it.

The questions and exercises inside are pulled from real conversations with real clients, after producing hundreds of projects across dozens of industries.

This isn't about filling space. **It's about getting clear on what matters**—before the shoot, before the script, before you spend a dollar.

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1. KNOW THE GOAL

Before anything gets filmed or written, ask: What's this video actually for?

Is it to build awareness? Generate leads? Drive conversions? The answer shapes every decision that follows—messaging, tone, length, even how you'll measure success.

When your goal is clear, your strategy becomes focused. And when your team's aligned on what success looks like—whether that's brand visibility, new inquiries, or direct sales—you're far more likely to create a video that works.

What is this video for? (Choose one)

- ☐ Awareness
- ☐ Lead generation
- ☐ Sales/conversion
- ☐ Internal communication
- ☐ Something else: _____

How will you define success?

2. SAY ONE THING WELL

Your product or service might have 10 great selling points—but in a short video, *your audience will likely remember just one*. The most effective content chooses that one thing on purpose.

When you focus the message, you control what your viewer walks away with. Supporting points can reinforce the core idea, but everything should point back to it. This isn't about oversimplifying—it's about being strategic with attention.

A clear, focused message sticks. And if it sticks, it works.

What's the main idea your audience should walk away with?

(Try to write one sentence only, with one key feature)

What supporting points (if any) reinforce that idea?

3. MATCH THE SCOPE TO THE STRATEGY

Not every video needs to feel like a Super Bowl ad. The most effective content isn't always the flashiest—it's the one that fits your goals, your audience, and your resources.

When you're clear on what you want to say and what you have to work with—budget, time, team—you can focus on doing it well, without unnecessary stress or distraction.

Great creative starts with smart constraints.

What's your approximate video or content budget?

- ☐ Under \$5K
- ☐ \$5K–\$10K
- ☐ \$10K+
- ☐ Not sure yet

Do you have any specific format or style in mind?

- ☐ Filmed testimonial or ad
- ☐ Founder/team on-camera
- ☐ Short-form social video
- ☐ Something else: _____

What do you already have available to work with?

- ☐ Existing footage
- ☐ Brand guidelines / messaging
- ☐ On-camera talent or team
- ☐ A clear creative idea
- ☐ None of the above (I'm starting fresh)

4. PLAN THE PROMOTION

Creating a strong video is only half the job—making sure people actually see it is the other. If your plan ends with uploading it to YouTube or embedding it on your site, it probably won't go far. Whether it's paid ads, email, or social posts, *knowing how and where you'll share your video is key.*

Plan your promotion early so your content gets seen, shared, and acted on—not lost in the shuffle.

Where do you plan to share this video? (Check all that apply)

- ☐ TV, Streaming Ads (Netflix, YouTube, etc)
- ☐ Social Media (paid or free?)
- ☐ Website
- ☐ Internal Use (e.g. training, onboarding)
- ☐ Other: _____

Do you have a plan or budget to promote the video once it's live?

- ☐ Yes
- ☐ Not yet, but planning to
- ☐ Not sure

How does this video connect with other marketing efforts?

(e.g. product launch, campaign, newsletter, funnel stage, etc.)

5. THINK BEYOND ONE-OFFS

One shoot can go a long way—but too often, all that time and budget goes into just one video. With a little planning, the same footage can fuel short ads, social clips, testimonials, and more. **Ask yourself: what else can we capture while the cameras are rolling?**

Thinking beyond a single deliverable helps you stretch your budget, reduce stress, and create consistent content without starting from scratch.

How could this video support other content?

(Think about possible repurposing opportunities like...)

- ☐ Short clips for social
- ☐ Alternate versions for different audiences
- ☐ Behind-the-scenes content
- ☐ Training or internal use
- ☐ Blog or email content
- ☐ I'd love help figuring this out

What type of ongoing content do you typically need?

(Check all that apply)

- ☐ Social media videos
- ☐ Product or feature spotlights
- ☐ Ads for new launches or promotions
- ☐ Customer testimonials
- ☐ Brand-building content
- ☐ Something else: _____

BRINGING IT ALL TOGETHER

Take what you've written from the past five steps and summarize it here.

This is your one-page video strategy. Use it to share with your team, guide production—or send it to us at workbook@methodvideo.com if you'd like help bringing it to life.

The goal of this video (or video series) is to:

(e.g., increase awareness, generate leads, support a product launch)

The one message we want viewers to remember is:

(e.g., our product solves [this problem], we're the easiest to use, etc.)

We'll keep things focused by working within this scope / style:

(e.g., one-day shoot, talking-head + b-roll format, etc.)

We plan to promote the video(s) through:

(e.g., YouTube ads, social media, landing page, etc.)

We'll also make the most of our content by repurposing it into:

(e.g., short clips, vertical ads, behind-the-scenes posts, testimonials)

In short:

This video will help us:

by telling our customers this one thing:

in a way that's clear, strategic, and easy to build on.