A Connect PR® eBook

Creating a Customer Case Study Video

Why are case study videos so effective? First, they are interesting. Would you rather watch a story about a real business or an ad for a product? Second, they are credible. A customer has no "ax to grind." Viewers are likely to believe what they say. And third, viewers feel a connection with the customer being profiled.

The viewer has more in common with the customer than with you.

That's why customer case study videos are an integral part of nearly every top high-tech B2B vendor's marketing mix. Connect Studios has created hundreds of video customer case studies over the past thirty years. **In this eBook, we'll share best practices for creating effective case studies.**

Pre-Production

Case studies are, first and foremost, stories. The first step is to understand the story you are telling. Here are the steps we take to lock the story down:

1. **Interview your sales team.** They know what the customer's needs were, what sold them on your company, what they bought and how it went. Start with a quick pre-call with the sales team to lock down the story from their perspective.

2. **Pre-interview the customer.** Next, schedule a quick call with the customer. You want to hear—in their words—what the story is. Regardless of what your sales team believes, the customer's version of the story is what will make its way into the video. Better to know ahead of time what that is.

   During this pre-interview, you can also lock down logistics. When would be good for an onsite shoot? Where will your crew be shooting? Ask them to take photos of the various locations they have so you can decide ahead of time which is best.

   Finally, assuage their fears. People rarely like being filmed. Explain the process. Explain what you'll be doing to make them look (and sound) good.

3. **Next, prepare a formal storyboard for your video customer case study.** Put the words you expect the customer to say, add the kinds of b-roll you expect, specify any animation you anticipate, and so on. It isn't that you'll require them to recite their lines precisely—you'll just ask broad questions and record what comes out naturally. But, since you've done a pre-interview, you have a good idea of what they will say and how they will say it. This allows you to prepare a reasonable facsimile of what the final video will be.

   That's important because you can show that to your internal team. If you've missed something, they can point that out. That way, you will know what you need to capture when you arrive on site.

Pre-Production (cont.)

4. **Create a formal shot list.** This provides your video crew with a checklist for shoot day. They know precisely what interviews and which b-roll shots to acquire. Yes, they can gather more if available, but they know what they have to collect no matter what.

5. **Create a shoot schedule.** This gives you a logistical plan for shoot day. It includes:

   - When the crew will arrive and load their equipment into the shoot
   - When each interview will take place, and how long it will last
   - When (and where) b-roll shots will occur
   - How long breakdown and load-out will be

   This is important for you, so you are sure you can accomplish what you need to. It is also courteous for the customer.

6. **Line up your equipment and crew.** Do you need additional crew members or equipment? Now is the time to line that up.

   - Some equipment is worth investing in. Expensive, complex equipment like the camera and audio gear takes effort to learn and master. You don't just show up and start to shoot excellent footage with a new camera on day one. You're better off owning a pair of cameras and any microphones you'll need, and training on those before you ever use them.

Pre-Production (cont.)

- Other gear is easy (and inexpensive) to rent as needed. Lights and grip equipment (i.e., light stands, power cables, etc.) are easy and cheap to rent, and are fairly standard.

- A lighting engineer will usually bring their own lights, saving you from having to rent them.

- A good grip sometimes will supply grip equipment (although not as commonly as with lighting). A good idea is to hire a grip who works at an equipment rental outfit. They have access to anything you'll need, and can bring it and return it on your behalf. Often, they'll bring extra, just in case.

- You'll want two cameras. That makes it easier for your interviewee—they don't have to be "perfect." You can switch from one camera to the other anytime they "mess-up." That way, you can snip out the extraneous bits, and they look perfect.

  BUT … you might not have two cameramen in your company. It is easy to hire a second cameraperson to man the second camera. It's nice if they have experience with the type of camera you are using, but not mandatory. You will set the camera up, frame it, etc. Their job is just to maintain focus and check audio—something that is largely the same on any camera.

- Make-up artist. Do you need a make-up artist? Probably not. Most women do their own, and most men don't want it. We carry a simple kit with a matte gel that keeps the subject from sweating (but is otherwise invisible) or some powder that does much the same thing. But, on higher-end shoots, you may want a make-up artist and perhaps even a hairstylist.

Finally, it is the day of your shoot. If you've done your pre-production well, this will be a smooth day.

Here is a list of best practices we've learned over the past 30 years:

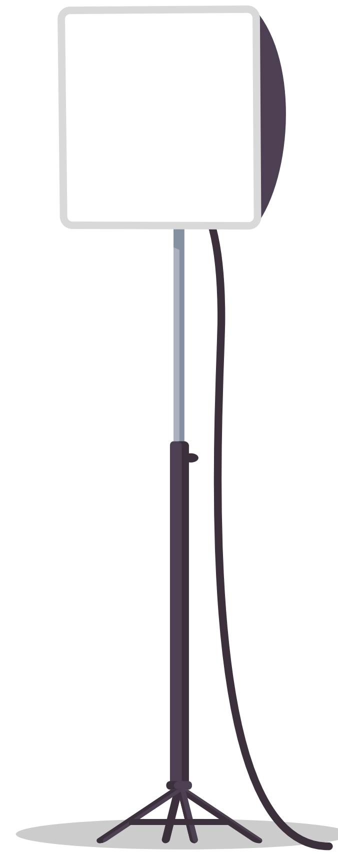
Production: Camera settings

This may seem obvious, but use the highest quality settings your cameras offer. Storage is cheap, don't be penny-wise/pound-foolish. Even if you plan to master your final video in a lower resolution, having the extra resolution gives you the freedom to crop in, if necessary.

In the same vein, shoot in log-format if available on your camera. Not familiar with log-format recording? That's a subject that is beyond the scope of this eBook, but here is an excellent article on just what Log is, and why it helps. The high-level answer is Log helps you create better-looking footage.

What about frames-per-second? Most shooters prefer 24 fps for case studies as it provides a look more akin to cinema, but this is a personal preference thing. Just know what you prefer before you show up, and proactively set your cameras accordingly.

Production: Lighting



Most interviews are shot indoors, so let's start there. The classic technique for lighting an interview subject indoors is classic three-point lighting. Again, this is a subject in its own right, but here is a quick tutorial on what three-point lighting is and how to do it.

It is crucial to mention one important lighting tip. Use soft light! What's that? Take two lights—one is a point light (like a flashlight) and the other is a really wide light, like a massive light shielded by a king-size bedsheet pulled tight. The massive light leaves very few shadows, while the point light leaves crisp, dark shadows. We call the massive light "soft" for this reason.

Soft light is important because it is flattering. Your subject will look much better with soft light than harsh light. Your job is to make them look good, and soft lighting is key for this.

By the way, harsh lighting is sometimes useful as well. If you're shooting the villain scene in the next James Bond, you definitely want some nasty hard lighting. But for interviews, stick to soft lighting.

How do you get soft light? By using some sort of diffusion between your light and your subject. This can be a fabric (like the bedsheet, but better) held on a frame on a C-stand. Or, it can be what's known as a softbox, which mounts to your light. There are entire courses on soft lighting, but here is a quick tutorial on achieving soft light.

Production: Audio

It should go without saying, but in an interview, audio is really important. So, first thing, be on the lookout for noise in your shoot. You often won't hear the noise as you're shooting—the human brain tunes noise out in real-time. But afterwards, in the editing studio, it will be super annoying. Ditto for the poor viewers who have to listen to it. Our brains don't tune the noise out when we're watching video. Here are common sources of noise during interviews:

- **Air conditioning.** You may have to turn the A/C off during the interview. But, that's often not possible, so try to set-up away from the loudest areas.
- **Elevators**
- **Other mechanical equipment**
- **Street noise**
- **Loud noises from co-workers**

Get used to listening for noise and trying to eliminate it. Sometimes, it is unavoidable. Just do the best you can.

Have you heard the term signal-to-noise ratio? Think of the "signal" as the sound you want to hear (i.e., the interview), and the noise as the sounds you don't want to hear (A/C, for example). If the subject is talking really loudly, and the A/C is really quiet, you have a high signal-to-noise ratio. That's what you want. An "inverse square law" will help you improve your signal-to-noise ratio:

- **Sound decreases the farther away it is.** Okay, this is obvious. But it decreases a LOT. It decreases by the square of the distance. Sorry, you thought there wouldn't be math! Look at this example: Place your mike 2 inches from your subject's vocal cords. Imagine the A/C is 10 feet away (120 inches). Since the A/C is 60 times as far away, it will decrease by a factor of 3,600!

  So … move the "noise" as far away as you can, and place the microphone as close as you can. By doing so, you'll maximize your signal-to-noise ratio and have reduced your noise problem to a manageable one.

  Which is a good segue into the type of microphone to use …

Production: Types of microphones

You can use two basic types of microphones (mics) during an interview: Lavalier and shotgun. Here are the pros and cons of each:

- **Lavalier.** This is a very small mic connected to a transmitter that transmits the signal wirelessly to a receiver attached to the camera. This provides several advantages:
    - The mic is so small you can place it literally inches from the vocal cords, improving signal-to-noise ratios.
    - You don't have to manage wires coming from the camera into the shot.

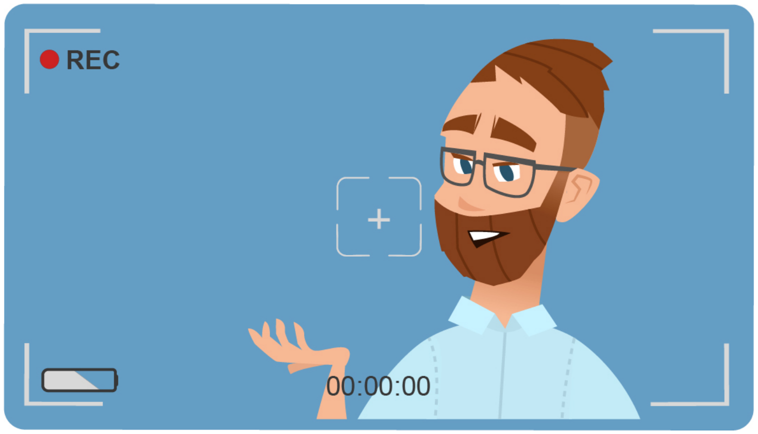
  But it also has a few disadvantages:
    - It is a teeny mic, and thus is not as high quality as the very best boom mics.
    - Unlike a boom mic placed just out of the frame, a lav mic is usually visible, at least slightly.
    - Lav mics are subject to radio interference. It is not uncommon for a cellular phone to cause buzzing on a lav mic.
- **Boom microphones.** A boom mic is a long, cylindrical microphone that can provide very high quality, but is typically much farther from the subject (thus with decreased signal-to-noise), and the hassle of extra cables to manage.

We typically use both on our shoots. We wire a lav mic as close as possible, but also place a boom mic on a boom stand just outside the shot. The reason is safety. We prefer the signal-to-noise ratio of the lav mics, but we have the boom mic in case something happens to our lav mic signals.

Production: Framing

Framing a shot is deciding where your interview subject will fit inside the video frame. Here are the rules we use for our interviews. Feel free to make your own rules, but do have rules!

- **Level.** We prefer a level shot—the lens is more or less at the subject's eye height. Why? We find that looking down or up on the subject alters how the viewer perceives the subject. A level shot is more neutral.
- **Eye line.** We make sure our A camera and B camera have the subject's eye line at basically the same level. If the A-camera is framed such that the eyes are 25% down from the top of the frame, we make sure the B camera does the same. This prevents a subtle disconnect for the viewer when we swap from A to B and back.
- **Short key (Split the Camera and Key).** We have the subject look straight at the interviewer (not the camera) during the interview. We make sure the interviewer sits between the key light and the camera.



This means the key light will be on the side of the face that is away from the cameras. This is the more common way to light. Most DPs (director of photography) believe this arrangement is more interesting, and provides more dimensionality to the subject's face. But try it yourself and make your own decision.

See examples of our videos

View our portfolio

Production: Framing (cont.)

- **Positive space.** Rather than put the subject in the middle of frame, place the subject on one side of the frame, the side away from where they are looking. Thus, they are looking into the open (vacant) part of the frame. This space is called "positive space" because we see where the subject is looking, and the energy flows that way. If they were on the other side of the frame, the space would be behind them and would be called negative space. Try it sometimes … it looks weird to my eye.

  We like this because it gives us space for titles, animations, etc.

- **A camera and B camera.** We tend to frame our A camera at mid-torso to a few inches above the subject's head, and with less of an angle between the camera and the view of the subject. The B camera is a wider angle and a tighter shot (maybe just below the shoulder to just at the top of the head). This is a more intimate shot, which makes sense for a cutaway.

  Be careful that the background in both shots is similar, otherwise it is jarring to the viewer.

- **Bokeh.** The look of having your subject in sharp focus, and the background out-of-focus is called Bokeh. Bokeh has several advantages:

  - It keeps the viewer's attention on your subject, not the background.
  - It is visually pleasing.
  - It has a cinematic look, which up-levels your video's production values.

  Bokeh is achieved through stopping-down the camera's aperture. Typically, this requires a more expensive lens and lowered lighting (as stopped-down aperture means more light gets through the lens).

Production: Two cameras

Shooting with two cameras offers a big advantage in interviews. By running two cameras simultaneously, you can switch from your A camera to your B camera in the edit and use that technique to splice out "flubs" your subject makes. It means you can make your subject look sharp and articulate even if they tend to pause and trip over what they are saying.

See the notes under **Framing** for advice on how to frame each camera in a two-camera shot.

Production: Make-up

The key here is to watch closely for signs of sweat. As your subject becomes nervous or hot, they start to become "shiny." You can combat this with a blotter to mop-up the moisture. In more serious cases, you can use a neutral powder or a matte gel.

Production: Instructions for your subject

For many of your video customer case study interviews, this will be their first time on camera. Here are a set of rules we give our subjects that make things go more smoothly:

- **Look at the interviewer, not the camera.** This is key. When a person looks directly at the camera, the viewer reads that as "selling." When the viewer is looking slightly off-camera to an unseen interviewer, the viewer feels like they are observing a true and honest conversation. The second is what you want.
- **Remember that the viewer won't hear the interviewer's questions.** Frame your answers in a way that will work without hearing the question.

  For example, if the interviewer asks, why did you select the Binford T9000 series, and the subject says, "We selected it because it was fast," the viewer won't know what "it" is. Better would be, "We selected the Binford T9000 because it was fast."
- **If you (the subject) mess-up your answer, feel free to just restart.** But, take a deep, cleansing breath first, and remember to look directly at the interviewer before you start to talk again. Otherwise, you might be looking off-camera with a nervous laugh as you start, which the viewer won't understand.

Production: Only one person talks to the subject

We like to run an open, collaborative set. If a crew member (or the client) sees or thinks of something, we encourage them to let us know. But nobody is allowed to talk to the subject other than the interviewer.

The reason is that being interviewed is an intense, uncomfortable endeavor. We work very hard to establish rapport and trust with the subject—starting as early as the pre-interview. Out job is to get the subject to forget about the $100,000 of video equipment, and all the crew standing around. We want to create a bubble in which only the subject and the interviewer exist.

If a random crew member says, "Hey, that sounded a little flat," or "Look at the interviewer," or "Your starting to sweat," then the subject realizes he or she is on a stage, being evaluated by 4 or 5 professionals. That's intimidating and unlikely to lead to a smooth interview!

Instead, crew members very discreetly channel any comments they have directly to the interviewer, and we take the appropriate action. The end result is a much more relaxed subject and a more natural, believable interview.

Production: Interview question techniques

The key to case study interviews is to have a "light touch." Most people you interview are not professional actors, and they don't respond well to direction. If you work them too hard, they tend to freeze up. With that in mind, here are some keys to interviewing customers:

- **Create a "discussion topic" list ahead of the interview**. The idea is to keep the topics broad ... you want the subject to talk, not answer questions. For example, "Tell me about your role at Acme Manufacturing" will get a more natural, usable response than, "What is your title?"

  We often list the key points we would like to see them cover in a given discussion topic, but we don't tell them that. we see what they provide unaided, and then we ask follow-up questions if they have missed anything.

- **Start with easy, softball questions.** We usually start with "Tell me about your company," because everyone knows how to answer that.

- **Revisit topics as the interview proceeds.** Reintroduce topics until you get what you want. It takes a while for the subject to calm down and forget about the cameras. Expect that their early answers will be useless—that's normal.

  Rather than staying on the same topic until they get it right—which can terrify the subject—hit it a few times and then move on. Revisit it later, after they've relaxed.

- **When you've completed all the discussion topics and revisited those you needed to revisit, it's time to go for broke.** First, ask the subject to tell the entire story—top to bottom—in one take. Tell me about the company, your role, why you needed a solution, how you selected us as the solution, what we did and how it went.

  Tell them not to worry about making it perfect; just tell me the story in one take. At this point, they are as warmed-up as they'll ever be, and you stand a good chance of getting some excellent, smooth, believable passages with this simple technique. And, if it doesn't work, no worries. You already have what you needed.

- **As a final step, We have them read the actual script we wrote.** We have them sit in the same chair, and hold the paper up so their head is in the same position and pause when they turn the page.

  We ask them to read it like they are "talking," not like they are "reading." We am looking for a version of the story that is precisely correct, in case they never got that part correct in their interview. If necessary, we will use that snippet while showing b-roll. It only works about half the time, but it is worth trying. Sometimes it can save an interview.

Production: B-roll

B-roll is video footage you show over the audio of the subject talking. First, nobody wants to watch someone talk non-stop for minutes on end. B-roll spices-up the case study. Second, sometimes you'll have to cut between the A camera and B camera several times in rapid succession to get rid of ums, ahs and miscues. Too many cuts too quickly make for jarring interviews. Showing b-roll smooths all that out. Here are some ideas for what to shoot for compelling b-roll, and best practices for shooting b-roll:

- **Show the subject in action.** We're listening to him (or her) anyway, so why not show them taking care of business:
    - In their office, on the phone.
    - Walking down the hall (perhaps talking to a co-worker).
    - Working on something physically (maybe assembling a product).
    - In a meeting in a conference room at the whiteboard.

- **Establishing a shot of the exterior of the building**:
    - A "crane" shot of the building. This is done as simply as attaching a stabilizing gimbal to a long pole and elevating the camera slowly from ground-level to 10-12 feet.
    - Drone shot of the building.
    - Set shot of building (i.e., camera on a tripod, no zoom, no pan).
    - Time-lapse of building showing traffic whizzing by.

Production: B-roll (cont.)

- **Establishing a shot of the interior of the building**
  - Wide shot of employees working in their cubicles or open offices.
  - Wide shot of manufacturing plant.
- **Detail shots**
  - Close-up of hands.
  - Close-up of computer screens.
  - Close-up of equipment.
  - Very tight close-up of an employee with glasses in which we see a reflection of the computer monitor with a colorful screen.
- **Framing.** Your interviews are all shot at roughly eye-level. Break things up with your b-roll. Maybe put the camera really low, looking up. Or high, looking down. This is supposed to be fun and to shake things up.
- **Existing b-roll.** Ask if the customer has any b-roll they have shot of their operations. It might be perfect for your uses!
- **Stock video**. If all else fails, look for stock video footage you can use that looks like the customer's business.

Production: Digital imaging technician

In the old days, we "filmed" interviews (meaning we shot footage that was recorded on film). Then we "taped" interviews (stored on videotape). Now we record interviews in silicon, so what's that called? We don't know, but we do know there is now a person on set called the DIT, or digital imaging technician. This person's job is to make sure you don't lose all this important footage you've recorded. Here are some best-practices for this job:

- **Bring lots of memory cards.** We arrive on shoots with $80,000 worth of video gear. We also have a crew that we'll pay thousands for that day. Why would we ever scrimp on memory cards! Yes, today's more powerful cameras use very expensive cards. Our cameras, for example, use dual cards that cost $400 each. So, when the interview starts, we have $1,600 worth of cards split between the A and B cameras.

  Our rule is to have enough cards on hand so we never have to re-use a card that day. If we have several interviews and a lot of b-roll, that can easily require $3,200 worth of cards. But that's a drop in the bucket compared to what we spent to be equipped for that shoot in the first place.

- **Bring a laptop with a FAST hard disk.** Today's cameras store gigabytes and even terabytes of data. Unless you want to spend hours onsite copying cards to offline storage, you'll want to have a fast hard disk. We use hard disks with USC 3.0 minimum interface (or Thunderbolt).

- **Copy cards as soon as each scene is shot.** As mentioned, copying cards to a local hard disk can take time. If you wait until the end of the shoot, you'll have a big backlog to deal with. We always start the copying as soon as we finish a scene. We then place those memory cards aside. We don't erase them until we're back in the editing suite, and we've confirmed the video files have transferred successfully.

Post-Production

After you've completed your shoot, and you're back in the editing suite, the fun begins. Now you get to assemble your story! Here are some best-practices for this stage:

- **Transcripts.** The first thing we do is burn out an audio file of all interviews and get a written transcript of that. This is the simplest way for team members to choose passages they feel best represent the story. The editor will make the final determination, of course, factoring everything in, but the transcript is an excellent team tool.

  Rev.com or Transcriptive from Digital Anarchy are two great tools for this.

- **Paper edit.** We often take the transcript, select passages, and build a "paper edit" in Word. This is much simpler and faster than doing our edit in your video editor (Adobe Premiere Pro, in our case). Once our team is happy with the paper edit, our editor can use that to create the actual edit.

- **Smoothing out interviews.** As previously discussed, non-actors are not very good at creating perfect, error-free interviews. There will be lots of ums, ahs and miscues in their interview.
  Our technique is as follows:

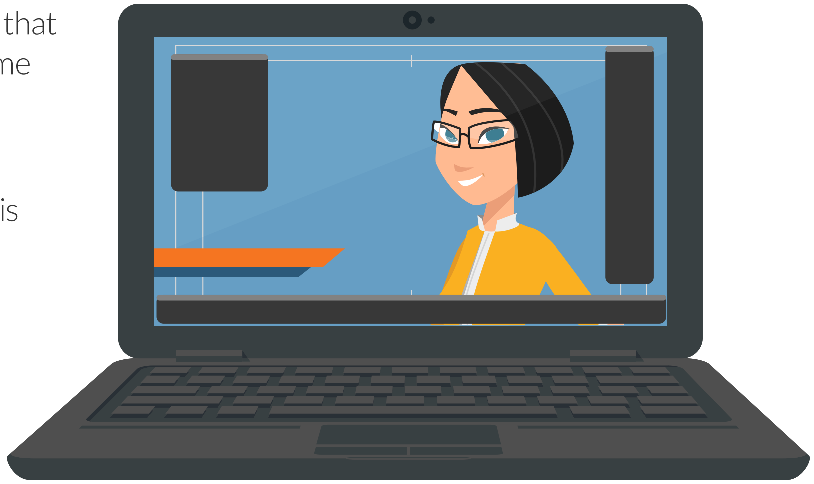
  - First, lay down a sequence with the edited interview, warts and all.
  - Next, remove all the ums, ahs and miscues. This will leave "jump cuts," where it is clear the edit has clipped something out because the subject's head jumps visibly.
  - Try switching cameras from A to B or vice-versa to eliminate the jump cuts.
  - Cover the interview with b-roll in those places where you would have too many camera switches.

Post-Production (cont.)

- **Lower-thirds.** A "lower-third" is text placed over an interview subject that identifies the person (ex: Neil Myers, President, Connect PR). The name lower-third comes from the general placement of the text—the lower third of the screen.

  As a rule, we suggest choosing a clip that runs for at least 7 seconds. This allows you to have a second with no text, then fade in the lower-third over 1 second, hold for at least 3 seconds, and then fade out over 1 second, leaving the clip with no text for the final second.

  There are hundreds of commercially available lower-thirds you can purchase, but your graphics team can easily create one that fits your corporate style guide. With lower-thirds, less is more.



- **Animation.** Animation can significantly improve video customer case studies in a variety of ways:

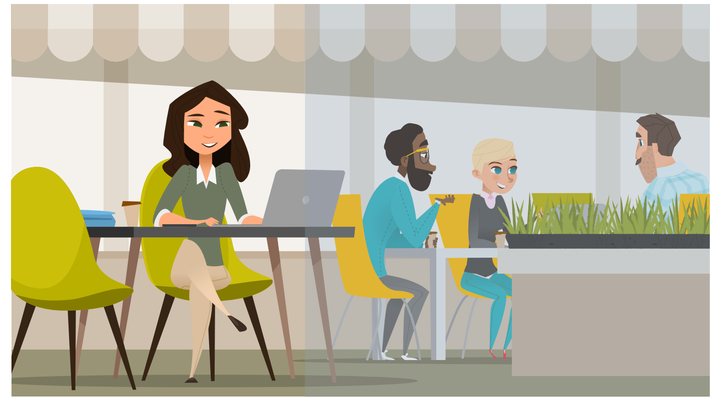
  - **Bullets.** When your subject is "listing" something (perhaps the benefits they accrued from using your products), you can use the positive space in the frame to list the items as the subject mentions them. Retention increases significantly when showing on screen what is being said.

  - **How something works.** The subject will often describe something technical. Maybe they will describe what was installed, or how it works. A simple animation can "show" the viewer what the subject is describing, boosting comprehension and retention. You can place such an animation in the positive space, or simply cut to a full-screen version of the animation.

  When using positive space, make sure you check how busy that space is. If the space is too busy, it will fight with the animation you are showing. In such a case, you can place a semi-transparent rectangle over the positive space and below the animation that will tone down the background.

- **Audio.** We could write an entire eBook on how to work with audio, but that is beyond the scope of this eBook. That said, here is a good primer on how to make the most of voice audio.

Post-Production (cont.)



- **Color grading.** When looking at your finished video, anything in your shot that is white should be, indeed, white. Black should be black. Middle grays should be in the middle. And the colors should be true. That's rarely how things look right out of the camera. There may have been a lighting issue, perhaps your camera settings were slightly off, and shooting in log dulls footage down.

  That's where color grading comes in. Below is my routine for fixing color in post. Here is a quick video tutorial on the basics if you are new to using scopes to color grade.

1. **Add a LUT.** If you shot log footage, first apply a LUT to your footage. This will get the color grading in the general ballpark of where it needs to be, but further adjustments will still be needed in all likelihood.

2. **White balance.** Choose something in the frame that is white, and use the color balance tool to adjust to that color. Best is if you used a slate before your interview started—it will have a pure white on it. But teeth or the whites of the eye are a good stand-in in a pinch.

3. **Set your black levels.** Use the RGB parade tool along with your black levels adjustment to set your blacks to the lowest level. This takes footage that seems faded and punches it up.

4. **Set your white levels.** Again, use the RGB tool and set your white levels. It isn't always necessary to set them to the maximum level—use your eye and your judgment here.

5. **Set highlights and shadows.** If needed, adjust these levels to suit.

6. **Set saturation.** To check to see whether your colors are saturated enough, use the HLS vectorscope tool. Adjust until the colors are in the correct range. Here is a great video on how to use an HLS Vectorscope.

- **Music.** If you're familiar with our eBook on creating effective animated explainers, you'll recognize this section on music. I've copied this over because the same principles apply here as well.

  Yes, you need music. It is crucial. Music adds momentum and energy. It also adds emotion; music tells the viewer how to feel.

  That said, have a light touch with your music. Don't use a densely orchestrated piece. Think about the pitch (from low to high) that the music uses. Leave space for the pitch voices to occupy—use music with pitches below and/or above that. Fewer instruments are better so as not to compete with the voice. A light, "tumbling forward" piece gives the animation energy and momentum, without taking over.

  Try to use music with a clear, strong "stinger" at the end. A stinger is that big finish at the end of the music where the instruments and percussion hit a climax so you know the music is done. This is as opposed to music that just fades out. Use that to time the last syllable of your voice over to the punch at the end of the song. Best is to also have a delay after the stinger to let the viewer down softly.

  Don't try to find music that is the precise time of your voice-over. First, the voice over may change anyway. But, second, it is easy to splice music to make it longer or shorter. Just choose a section where the voice is especially strong to mask the splice. And, match a part of the music where the two parts you are splicing are both downbeats of the same part of the measure.

Post-Production (cont.)

- **Bumpers.** A bumper is a clip found at the beginning and/or end of a video. It contains words (and is often animated) to present a title, or a logo and tagline.

  We rarely use bumpers at the start of a video anymore. Rather, we use a cold open. This is where you are immediately immersed in the action of the video. The idea is that with today's impatient viewer, making them sit through a title is boring, and they may click out before the video even starts.

  But we usually do end with a bumper at the end. On this bumper, we include the company name, a tagline (optional), a URL they can go to for more information, and then a subtle fade to black.

  The entire bumper lasts between 4 and 6 seconds.

ABOUT CONNECT PR

We've created hundreds of both animated explainers and live-action videos for clients over the past 30 years. Hopefully this eBook gives you some good ideas. Not sure you want to spend the time and effort? Contact Connect and see how we can help you produce impactful customer video case studies that will boost your lead-generation efforts.

Let's discuss your project