

# 7 Steps to Video Success

How to build a high-performance video library








Whether you're looking to make your first video or to extend a deep library, this short guide shows the seven steps to follow to be successful right now—and over the long term.



**FLIKLI**

## Contents

Whether you're looking to make your first video or to extend a deep library, following these straightforward steps will give you the confidence and understanding you need to be successful with your upcoming video project.

 <b>Step 1</b> Understand Your Objectives .....	4
 <b>Step 2</b> Review Your Customer Journey .....	5
 <b>Step 3</b> Consider Your Overall Content Library.....	6
 <b>Step 4</b> Prepare to Measure What Matters.....	7
 <b>Step 5</b> Plan Your Distribution.....	8
 <b>Step 6</b> Pick an Outcome and Chart the Journey.....	9
 <b>Step 7</b> Create Your Video.....	10

**Cover:** *IBM® InfoSphere® QualityStage® Address Verification Interface* explains how organizations can organize, verify, and transform address data without needing expertise in international postal standards and language

**Right:** *Manulife's Future of Work* highlights the motivations of, and challenges facing, different personas in the modern workforce





## Success Doesn't Happen by Accident

Second only to having an effective website, video is the most important tool for today's marketers—simply put, there is no better medium for clearly, concisely, and consistently communicating your messages and influencing behavior.

And with an abundance of affordable equipment, powerful services, and eager vendors, video marketing has never been more accessible.

However, while it's easy to get started with video, getting it right—and reaching your goals—takes a bit more effort. Like any marketing initiative, if you rush into video you run the risk of not fulfilling its full potential; even worse, you might inadvertently confuse your prospects and limit your future options.

But don't worry—the truth is that a little up-front planning goes a very long way to ensuring you reach your goals.

### So let's get started.

**Video is a B2B imperative** B2B buyers rely on video throughout the entire buying process, with many specifically seeking out video content as a preferred resource.<sup>1</sup>

<sup>1</sup> Per *The Changing Face of B2B Marketing* (Google)

**Opposite:** *Protect your heroes* introduces Immutouch, a wearable which prevents front-line workers from involuntarily touching their face



## Step 1

# Understand Your Objectives

For all the excitement and hype (much of it justified, some of it a little over the top) video is simply a tool—albeit a powerful one—in the modern marketer’s arsenal. Like all tools, video should be applied in the right circumstances in service to some larger objectives.

For many organizations, the primary objective is revenue-related—maybe an absolute number or a growth rate. Other organizations might be focused more on customer retention. For others, maybe revenue and retention are off in the future, and today’s urgent needs are creating awareness and building influence.

**The first step in succeeding with video is to understand these top-level objectives** and to ask how video can play a role in reaching them—effectively and efficiently. Starting in this way:

- Guarantees your efforts contribute to your organization’s most important needs
- Ensures your video library is coherent, with all the pieces efficiently working together as part of a larger whole
- Contributes to a longer shelf life for your video assets, increasing your overall return on investment

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### Questions to Ask:

- What are my organization’s most important objectives?
- What are my department’s most important objectives?
- How can video help us reach these objectives?

## Video is Versatile

Video is the perfect medium for quick and clear communication, with research suggesting that the human brain processes video 60,000 times faster than text.<sup>2</sup> Because of this, video is practically limitless in the ways in which it can contribute to achieving important objectives

Objective	Video’s Role
<i>Create Awareness</i>	<ul style="list-style-type: none"><li>• Educate on market problems or misconceptions in an interesting and accessible way</li><li>• Tell a powerful story that highlights the shortcomings of the status quo and hints at a superior alternative</li><li>• Provide appealing assets for digital campaigns and social channels to leverage</li></ul>
<i>Grow Revenue</i>	<ul style="list-style-type: none"><li>• Increase the number of wins by generating more leads</li><li>• Shorten the sales cycle by proactively guiding prospects through the buying journey</li><li>• Prevent discounting by showing valuable differentiation against the competition</li><li>• Increase deal size by showcasing additional products</li></ul>
<i>Improve Customer Retention</i>	<ul style="list-style-type: none"><li>• Ensure customers enjoy maximum value with quick-start tutorials, how-to guides, and tips-and-tricks videos</li><li>• Encourage customers to benefit from the latest features and releases with update videos</li></ul>

<sup>2</sup> Per [Create More Video to Engage Your B2B Buyers](#) (Forrester)

## Step 2

# Review Your Customer Journey

Used appropriately, video is very effective at influencing behavior and guiding people through a decision process—but to efficiently attract prospects and convert them into customers, you need **the right videos for the right moments**.

You should consider the needs of your ideal customers as they progress on their journey. For example, decision-makers rely on:

- **Top-of-funnel (TOFU) content** to help them better understand the problems they're facing and to make them aware of potential solutions
- **Middle-of-funnel (MOFU) content** to learn about how potential solutions address specific pain points, the benefits they can expect to experience, and what's needed (e.g., products, processes, services) to access these solutions
- **Bottom-of-funnel (BOFU) content** to determine what differentiates the perceived alternatives and—ultimately—inform their purchase decision

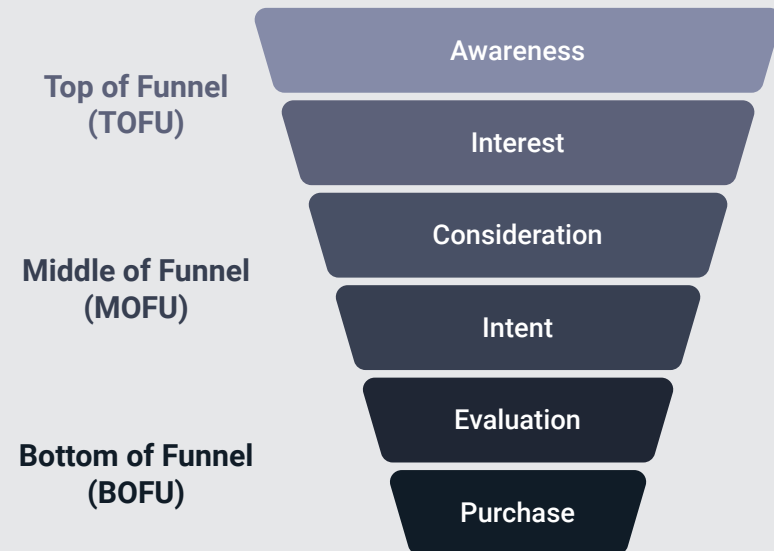
Why focus on ideal customers? Over the long term, your business will be more sustainable by specifically attracting ideal customers—while also appealing to other suitable (just not ideal) customers and filtering-out prospects who will cost too much to attract, win, and retain.

### Questions to Ask:

- Who are our ideal customers (whether based on fact/analysis or assumptions) and what is their ideal buying journey?
- What information needs do our ideal customers have? Where do these needs fit into their journey?
- What questions, misconceptions, or barriers prevent or stall ideal prospects who love our solution from progressing on their journey?

## Visualizing the Journey

Understanding the customer journey is a prerequisite for crafting useful sales and marketing content. If your company hasn't already defined the journey, then here's a helpful starting point—just modify as needed!



An overview of how different types of video content map to different stages of the customer journey is available in [\*Optimizing the Marketing Funnel Using Video\*](#).

A pink graphic element consisting of a large, rounded shape with a smaller circle inside it, containing the text 'Step 3' and a play button icon.

## Step 3

# Consider Your Overall Content Library

For most organizations, **a video library exists alongside other types of content**—from datasheets and brochures, to blog posts, articles, and press releases, to white papers and case studies, to landing pages and (of course) the overall website itself.

Creating a coherent video library that complements and integrates into this larger whole means stepping back—even if just for a moment—to consider how video relates to these other pieces in pursuit of the larger objectives.

In a perfect world, this larger content library is already mapped to the ideal customer journey—and your video library can just seamlessly join the party.

If that's not the case, then don't despair—as daunting as it can seem, for all but the largest enterprises it (really!) doesn't take too long to construct an inventory of your content resources and to assign them to different stages of the customer journey. It's a worthwhile exercise that rewards you with a better idea of where and how video will relate to these existing pieces.

**It also helps to look into the future**, beyond the existing material. If a content plan already exists, then great! But even if not, asking a few questions will still go a long way toward informing where video can help the most.

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### Questions to Ask:

- What pieces of content do we already have? How do they fit into and enable the ideal customer journey?
- How can video help us leverage this existing content? How can this existing content help us leverage video?
- What is our plan for content over the next few quarters? If we don't have a formal plan, then what are some needs we want to address?

## Building and Maintaining Balance is Important

A common mistake with video marketing (and with B2B marketing, in general) is to focus too much time and investment on the top of the funnel, at the expense of the later stages. Technology companies, especially, frequently fall into this trap because it takes a rare skillset to create MOFU and BOFU content which explores technical concepts in an accessible manner.

Building and maintaining a balanced content portfolio is crucial to long-term success. Disproportionately investing in TOFU content can lead to serious consequences, including:

- **Overly positive assessments of pipeline strength:** having lots of TOFU content can cause related metrics to appear strong, possibly blinding companies to the truth—at least for a few quarters—that demand isn't following suit
- **Expensive, inefficient sales engagements:** lacking content to efficiently transition leads beyond awareness, BDRs and account managers must manually nurture prospects to guide them to and through each stage of the journey
- **Deals that stall just before the finish line:** BOFU content is critical for helping to overcome those last few hurdles that can prevent deals from closing

So be on the lookout for top-heavy content libraries and impressive awareness metrics that aren't translating into similarly impressive demand indicators.

Think of video as another medium for communicating what you're already saying (or are going to say) in other formats. That is, your videos should work with other assets and content to summarize, repeat, and reinforce your key messages.



## Step 4

# Prepare to Measure What Matters

Even with modern attribution and lead scoring technologies in place, it can be challenging to measure precisely what contribution each piece of content makes toward the top-level objectives.

But that doesn't mean you can't assess video performance to make informed decisions and quantify return on investment (ROI). While the most suitable metrics will depend upon your goals and ideal customer journey, here are some candidates:

- **TOFU:** Views (but be careful!), Time Watched, Click-Throughs, MQLs
- **MOFU:** Lead Conversion Rate (e.g., email click-throughs, datasheet or other resource downloads), Pipeline Generated, Percent of Video Viewed
- **BOFU:** SQLs, Conversion Rate (e.g., white paper downloads, form fills), Percent of Video Viewed

**Decide in advance what to measure**, so you can put into place the tools required to get the measurements you need (rather than being limited after-the-fact to whatever data is available by 'default').

If you're planning to use more than one distribution channel (Step 5), then you should plan to compare channel performance—just make sure you can track video performance within each channel separately.

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### Questions to Ask:

- What actions do we want prospects to take at each stage of their journey? Which of those actions can we measure?
- Aside from specific actions, what other indicators of a successful 'mission' are available? (for instance, if a goal is to educate then measuring the percentage of each video viewed is a useful measurement)
- What ROI measures will my organization value?

### What To Do and What To Avoid

When you're planning and conducting your measurements, be sure to:

- Recognize that there are limitations to how tightly what can be measured relates to the overall objectives
- Assess individual videos, channels, and the overall program using different performance measures
- Compare performance over time—you may not know immediately what targets are achievable, but you can always try to improve
- Map metrics as closely as possible to desired actions within the customer journey
- Have different measures of success for different actions
- Test different hypotheses and pay attention to the feedback

And watch out that you don't:

- Fall victim to the "siren song" of vanity metrics (for example, Views is useful only in limited scenarios)
- Obsess over every available measurement—instead, focus on the bigger picture before you dive deeply into optimization

**FLIKLI** has helped many of our clients to determine the most meaningful ways of measuring video performance and ROI.

There are lots of helpful resources available online—we recommend taking a look at Vidyard's [\*\*\*Video Analytics and ROI: The Video Metrics That Matter\*\*\*](#).



## Step 5

# Plan Your Distribution

Today's marketers have at their disposal a wide array of digital channels, including websites, blogs, landing pages, social media, email, newsletters, and paid advertising—just to list a few!

These tools are vital to getting your videos in front of the right audience to convey information and influence behavior. It's worth giving a bit of thought to what channels you have available today and how they can work together to spread your message.

You'll also need to decide what service(s) to use to host your videos. YouTube is the world's second largest search engine—behind only Google's main search service, and many buyers skip general searching and go straight to YouTube. But YouTube's video metrics aren't as deep as those available through specialized services including Vidyard and Wistia.

Plus, you'll likely want to embed videos on your website, whether as content within your regular pages or on specialized landing pages.

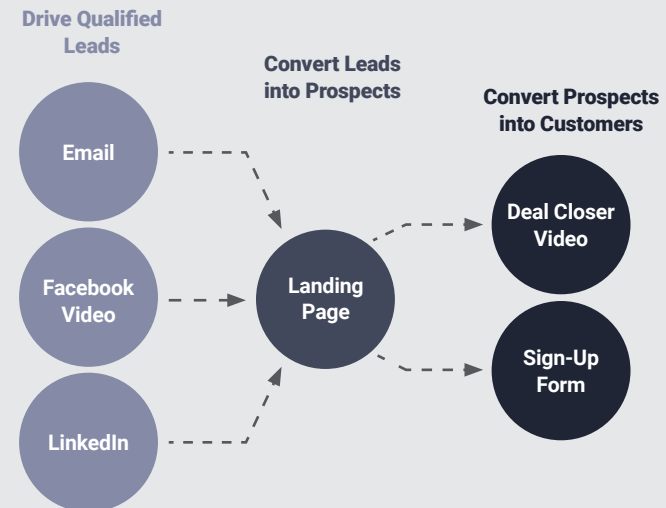
Remember, **focus on quality of journey over quantity of journeyers**—it's more important to have your channels work together to get your videos in front of the right people and to enable a seamless, straightforward customer journey than it is to simply blast your messages far and wide.

### Questions to Ask:

- What digital channels are available to us today?
- How will we expose our videos to our ideal prospects? Do we have any data which suggests which channels are most effective?
- How will our different—and potentially many—digital channels work together?

## Incorporating Video into the Mix

Introducing video into your asset mix should disrupt your results, not your processes. For instance, you can keep using email for marketing and nurturing, but now you can embed videos and thumbnail gifs to increase your click-through rates.



Vidyard's [\*Your Complete Guide to Social Media Video in 2020\*](#) is a great, up-to-date resource for learning how to use today's most popular social media video channels.



## Step 6

# Pick an Outcome and Chart the Journey

With the larger context, measurement tools, and distribution plan in place (or at least in the back of your mind), now's the time to pick an outcome—sign up beta testers, drive memberships, increase sales qualified leads (SQLs)—and chart the journey for your ideal customer.

If you already have experience creating these outcomes, then you might have an idea of what contributed to success in the past—take a moment to 'translate' those journeys into your video journey.

If you're just getting started, then try this simple breakdown:

- **Educate (TOFU):** provide information about a problem your prospects are experiencing
- **Explain (MOFU):** show how your solution addresses this problem and delivers valuable benefits
- **Differentiate (BOFU):** highlight the key and differentiating features that make our solution the superior option

Note that a **common mistake is to try to cover the whole journey in a single video**. This approach creates confusing messages, overwhelms viewers, limits your ability to present different paths, and makes it hard for you to identify exactly where prospects 'fall out' of your funnel.

### Questions to Ask:

- What pieces of information should we supply at each stage of our ideal customer journey?
- What specific calls-to-action (CTA) will help to guide prospects along their path?
- Do we need more than one video at any stage?

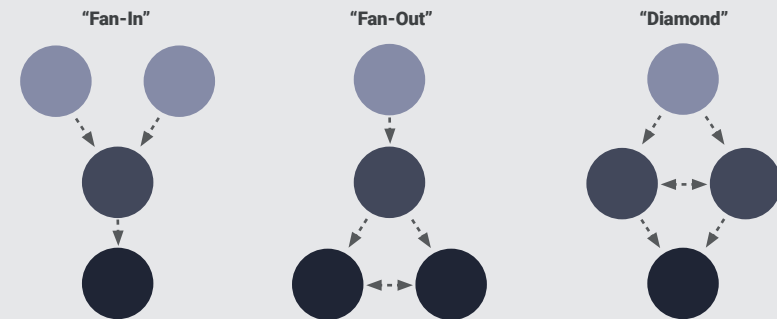
## Plotting the Course

The majority of customer journeys will follow a tight, linear path.



But sometimes, more advanced journeys are justified:

- **Fan-In:** useful when you solve more than one problem
- **Fan-Out:** well-suited for technically differentiated solutions
- **Diamond:** an effective way to showcase breadth



## Step 7

# Create Your Video

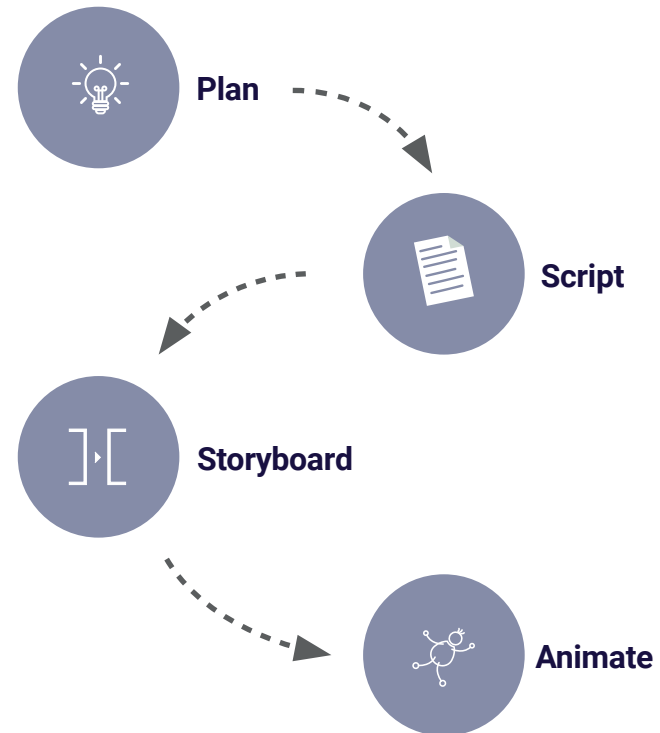
Producing video is a creative exercise, but the most effective videos still come from a disciplined process.

First, **plan your video** by jotting down the target audience, the purpose and call to action, where it fits in the journey, how it relates to other assets, your distribution plans, what information you can assume the viewer already has, and the most important message—the idea here is to have a “cheat sheet” so that anyone can quickly see why this video matters and what it will cover. The purpose and the message are the main factors which determine the duration; in general, TOFU videos are short and length increases as the journey progresses—but this isn’t a hard rule.

Next, **write the script**. Start with your key message and then add the minimum amount of words around it. Keep it simple and straightforward. And remember, a video voiceover likely proceeds at a slower pace than your internal monologue, so read your script out loud to avoid overshooting your time restriction.

With the script in place, **sketch out the storyboard** to show what images will tell your story—stick figures and blocky shapes are fine!

Finally, it’s time to **create the video**. Whether you’re using live action, 3D renderings, or 2D animations, focus on clearly conveying your message in pursuit of this video’s specific intentions. Resist the urge to try to make things super-fancy, as that can actually distract your viewers and harm your conversions.



### Questions to Ask:

- Where does this video fit into the ideal customer journey?
- What is our specific intention for this video?
- What information does the viewer already have?

## Succeeding with Video

Following these seven steps will help to ensure you benefit from a high-performance video library that contributes real results.

Even if you're just getting started and genuinely only need one short, specific video, taking a bit of time to consider the larger context—company goals, existing content, future needs—will increase your likelihood of long-term success.

**What comes next?** As you distribute your video, measure what matters to gain valuable feedback about performance and ROI. Use these insights to refine your distribution strategy and channels—to make sure your video has the maximum impact and to inform your future video investments.

**Ready to get the videos you need for your marketing funnel?**

[Book a free video strategy call](#)

**FLIKLI** custom-animates captivating videos that use high-impact messages and clear calls to action to attract prospects and accelerate their buying journey. This strategic approach grows your revenue while reducing your cost-of-acquisition, and scales to keep pace with—and to enable—your ambition.

*The Adventures of SmartCharge Homes and His Companion Wattson* introduces the FleetCarma® SmartCharge Platform for charging EVs



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