

VIDEO PRODUCTION CLIENT CHECKLIST

Everything you need to do at every step. From the brief to the final delivery.

Use this checklist alongside your production company. Your job and their job are different at every phase. This document maps both.

PHASE 1: THE BRIEF & CREATIVE DEVELOPMENT

Before any scripting or planning begins

	Task	Notes
☐	Define the goal of the video	<i>What does it need to accomplish?</i>
☐	Identify the target audience	<i>Who is watching? What do they care about?</i>
☐	Confirm distribution platforms	<i>Broadcast, social, digital, website?</i>
☐	Set a realistic budget framework	<i>Know your range before the first call</i>
☐	Align internal stakeholders	<i>Get sign-off before production starts, not after</i>
☐	Gather any existing brand assets	<i>Logos, style guides, fonts, past work</i>
☐	Define success metrics	<i>Views, conversions, awareness? Know what winning looks like</i>

PHASE 2: SCRIPTWRITING & CONCEPT DEVELOPMENT

The creative build (cheapest phase to make changes)

	Task	Notes
☐	Review and approve the concept	<i>Does it match the brief?</i>

	Task	Notes
☐	Push back if something feels off	<i>Script changes are free. Set changes are not.</i>
☐	Approve the final script	<i>No verbal approvals, confirm in writing</i>
☐	Review the storyboard	<i>Can you picture the finished video from this?</i>
☐	Confirm tone and visual direction	<i>Align on look, feel, pacing before production locks in</i>
☐	Sign off before pre-production starts	<i>Changes after this point cost money</i>

PHASE 3: PRE-PRODUCTION PLANNING

Logistics phase as this is where shoots succeed or fail

	Task	Notes
☐	Approve final shot list and storyboard	<i>Review carefully, this is what gets shot</i>
☐	Confirm location access	<i>Permits, access, parking, power (flag issues early)</i>
☐	Review and approve casting	<i>On-screen talent needs your sign-off</i>
☐	Confirm shoot date and call time	<i>Block it. Don't move it.</i>
☐	Align all on-camera participants	<i>Brief everyone appearing on camera beforehand</i>
☐	Gather all assets needed on set	<i>Products, props, logos, wardrobe references</i>
☐	Review and approve the budget	<i>Confirm 10% contingency is built in</i>
☐	Identify your single point of contact	<i>One person gives feedback on shoot day</i>

PHASE 4: THE SHOOT (PRODUCTION)

Cameras are rolling, trust the process you approved

	Task	Notes
☐	Arrive on time	<i>Crew is on the clock from call time</i>
☐	Bring your point of contact only	<i>Too many stakeholders on set creates confusion</i>
☐	Give all feedback through the producer	<i>Not directly to crew or director</i>
☐	Flag concerns before a take, not after	<i>Speak up early. Reshoots are expensive.</i>
☐	Trust the pre-production you approved	<i>The plan was made for a reason</i>
☐	Confirm any additional footage needed	<i>B-roll, cutaways, social-specific content</i>

PHASE 5: POST-PRODUCTION — THE EDIT

Raw footage becomes a finished video

	Task	Notes
☐	Review the rough cut on time	<i>Delays here push back your delivery date</i>
☐	Consolidate all feedback before sending	<i>One round of notes, not rolling revisions</i>
☐	Be specific in your feedback	<i>"Make it feel more energetic" needs examples</i>
☐	Confirm the number of revision rounds	<i>Agree on this before edits begin</i>
☐	Approve picture lock in writing	<i>Changes after picture lock affect color and sound budgets</i>
☐	Review for brand accuracy	<i>Logo usage, product names, messaging</i>

PHASE 6: COLOR, SOUND & VFX*The finishing phase. Look, feel, and audio*

	Task	Notes
☐	Review color grade against brand guidelines	<i>Does the look match what was approved?</i>
☐	Review the audio mix	<i>Dialogue clarity, music levels, sound effects</i>
☐	Confirm music licensing if applicable	<i>Licensed or original score, get it in writing</i>
☐	Review VFX and motion graphics	<i>Text accuracy, logo accuracy, animation timing</i>
☐	Final sign-off in writing	<i>Don't approve verbally. Confirm via email</i>

PHASE 7: DELIVERY & DISTRIBUTION*Final formats, platform specs, and launch*

	Task	Notes
☐	Confirm all required delivery formats	<i>Broadcast, digital, social (locked in pre-production)</i>
☐	Confirm aspect ratios per platform	<i>16:9, 1:1, 9:16 (specify upfront)</i>
☐	Review all versioned cuts	<i>30-sec, 15-sec, square format. Check all of them</i>
☐	Confirm file naming conventions	<i>Especially for agency or broadcast deliveries</i>
☐	Clarify raw footage ownership	<i>Who owns the files after delivery?</i>
☐	Confirm archive and storage terms	<i>Will files be held? For how long?</i>
☐	Launch. Review. Note learnings for next time.	

Notes

Ready to start your production?

Ajax Creative handles the full process from brief to delivery.

ajaxcreative.com/contact-us