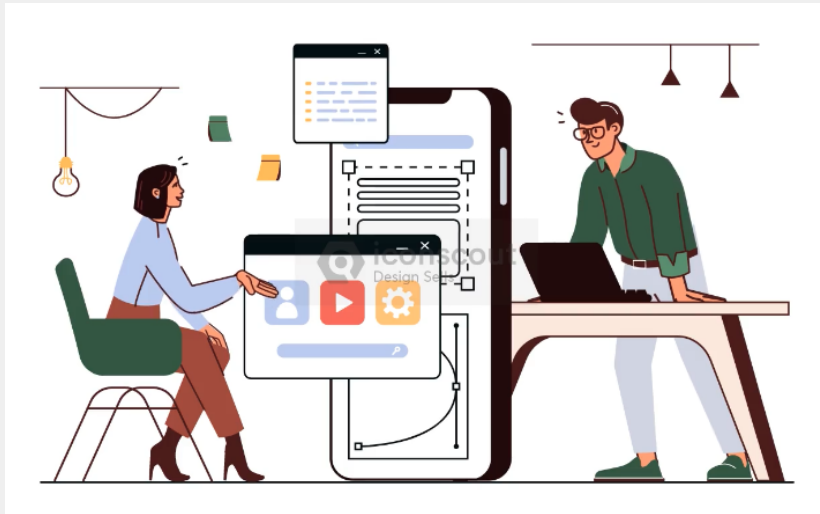




## **Video Playbook**

Best Practices For Creating Compelling  
Customer Education Video Content

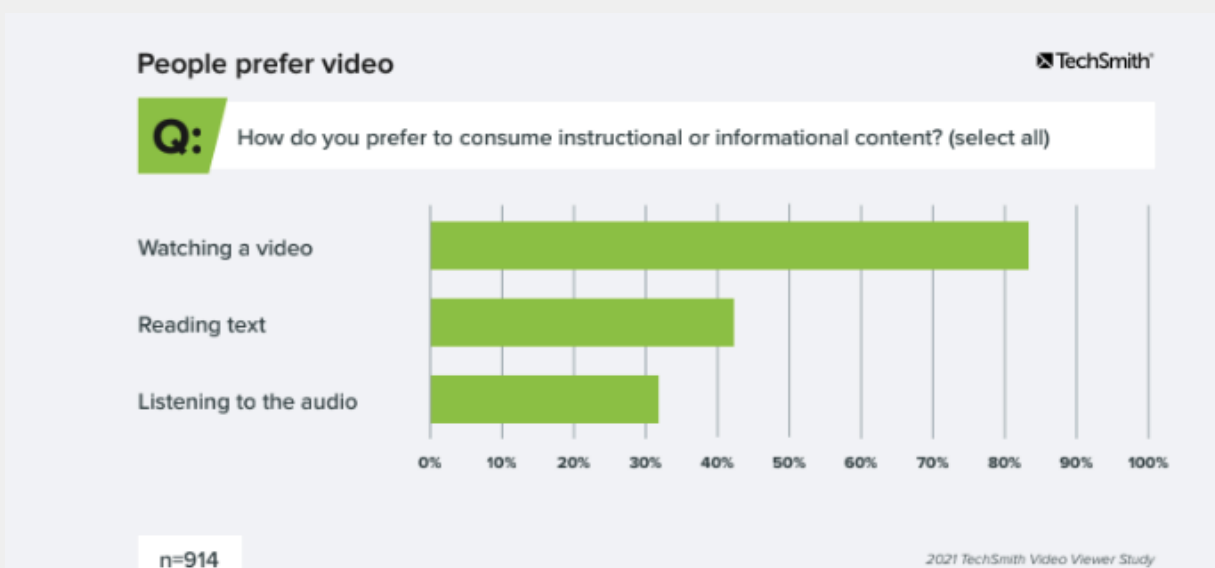


A recent [TechSmith Industry Benchmark Study](#) provides insight & data on the popularity and usage of video as a learning tool.

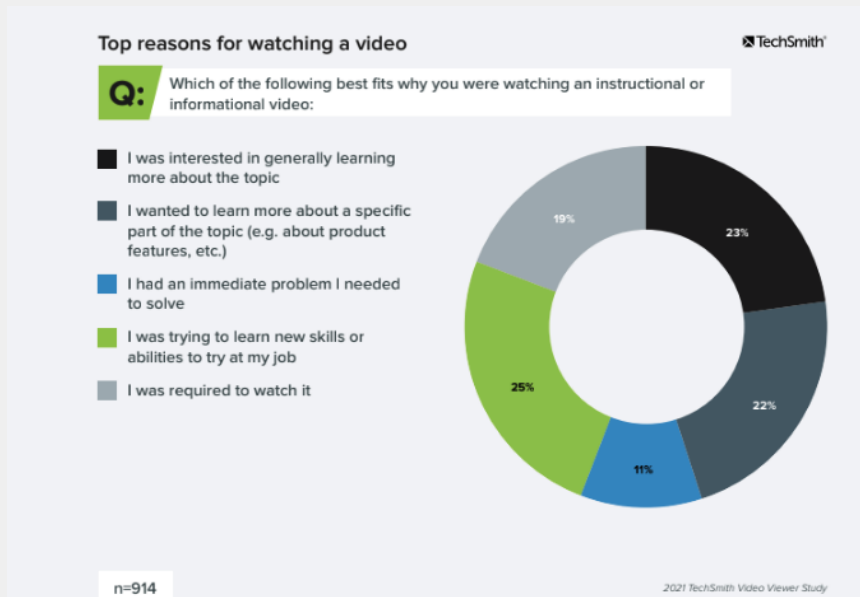
In this playbook we'll convert these insights into actionable guidance that will help Customer Education content creators create the most effective video training for the students in your training academy..

### How many people watch instructional videos?

83% of people said they prefer to consume instructional videos over reading text (40%) or listening to audio (30%) which supports our pursuance of a 'video first' approach to customer education and support content. Frequency of viewing videos was 2-4 times a week.



## Why are they watching instructional videos?



How can you translate this data into your online learning environment?

### **Interested in generally learning more about the topic**

For general instruction on a topic your online Academy provides guided learning process where users can get overall training on specific aspects or modules of your product

### **Wanted to learn more about a specific part of the topic**

For specific parts of a topic breaking down your courses into microlearning provides guided learning resources that are specific to a part of your product.

### **I had an immediate problem I needed to solve**

Immediate problem training should take a micro-learning approach and videos should be very specific to only solving a single challenge. If you use your LMS' single sign on capabilities you can link to individual lessons from right inside your product.

### **I was trying to learn new skills or abilities to try at my job**

Provide options to categorize your Customer Education content by skill if possible to meet this need

### **I was required to watch it**

This could apply to onboarding or product orientation or compliance training. If a user is required to complete a piece of Customer Education training, use your LMS' content reporting metrics to report on these.

## What types of instructional videos do people watch?



How can you translate this information into your own internal video production style?

### Informal Training Videos

When producing a training video make it conversational and relaxed in style.

### Professionally produced training videos

Users want professional production values. Make sure video and audio is recorded clearly, and post production is consistent and of the highest standard.

### Live streamed / webinar style videos

Repurpose your webinars and other ad-hoc trainings into 'Workshops' for your Customer Education academy.

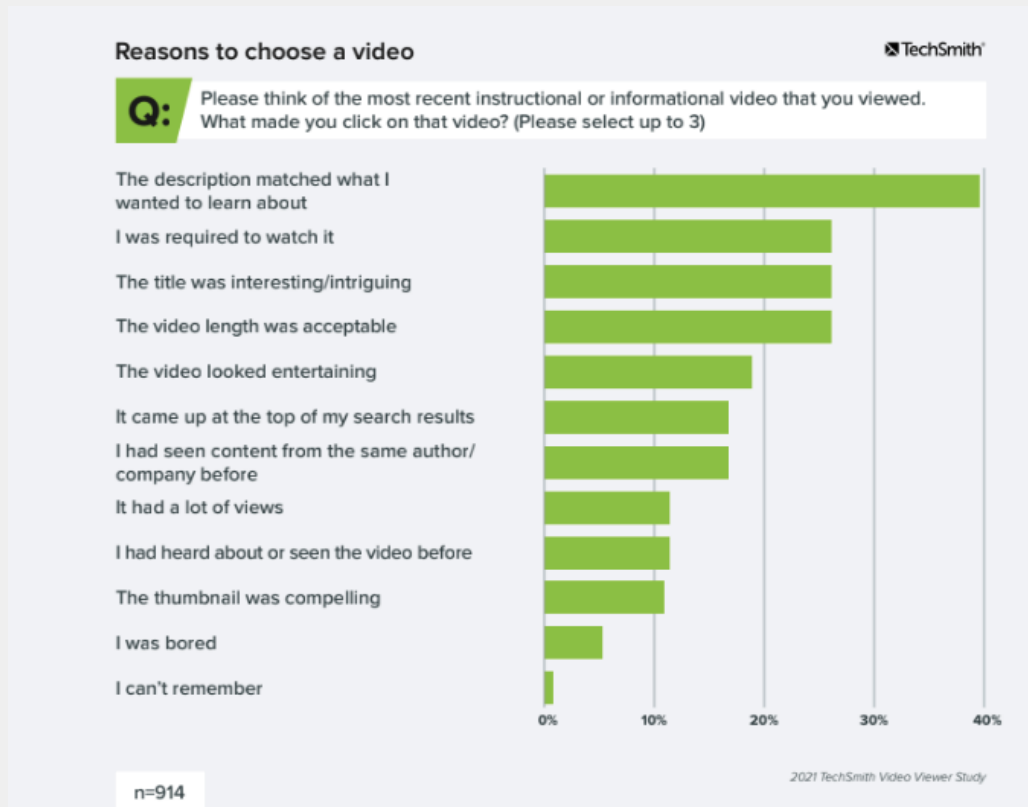
### Powerpoint Recordings

Slides are less popular, possibly because users see these as more 'formal'. Viewers prefer seeing the trainer on screen so if slides are used in a training video always try to include the presenter overlaid in a small insert box to make the video more engaging

### Meeting Recordings

Meeting recordings are the least popular style of video, perhaps because these can be unstructured conversations and hard to follow. However snippets of these could be useful as inserts into an overall longer training video production where they reinforce the topic.

### Reasons people chose to watch a video



### The description matched what I wanted to learn about

Discovery clearly starts before the search, therefore it's important that users can first find what they are looking for, although when they do search for it, they must be assured from the description that the video will solve their problem.

### I was required to watch it

Engagement can be less when users feel they are 'required' to watch rather than actively self-discovering in response to a problem.

This can come from a preconceived historical idea that online learning can be poorly delivered. Your goal is to bust that myth and despite being required to go through things such as onboarding, structured learning paths etc, make sure content uses as many of the guiding principles in the playbook as possible.

### The title was interesting

This is related to #1's description notes above. Titles are important too and play a big part in search discovery

**The video length was acceptable**

Microlearning is a trend mainly because viewer attention span is getting shorter. People are consuming media in different ways outside of the workplace, and this is influencing the way they consume media inside the workplace.

On social media and video platforms they're looking for bite sized content, with longer form content users are 'binge watching' series. Customer Education video content can tap into those embedded viewer habits.

Also see the section 'Optimal Length Of Instructional Videos'

**The video looked entertaining**

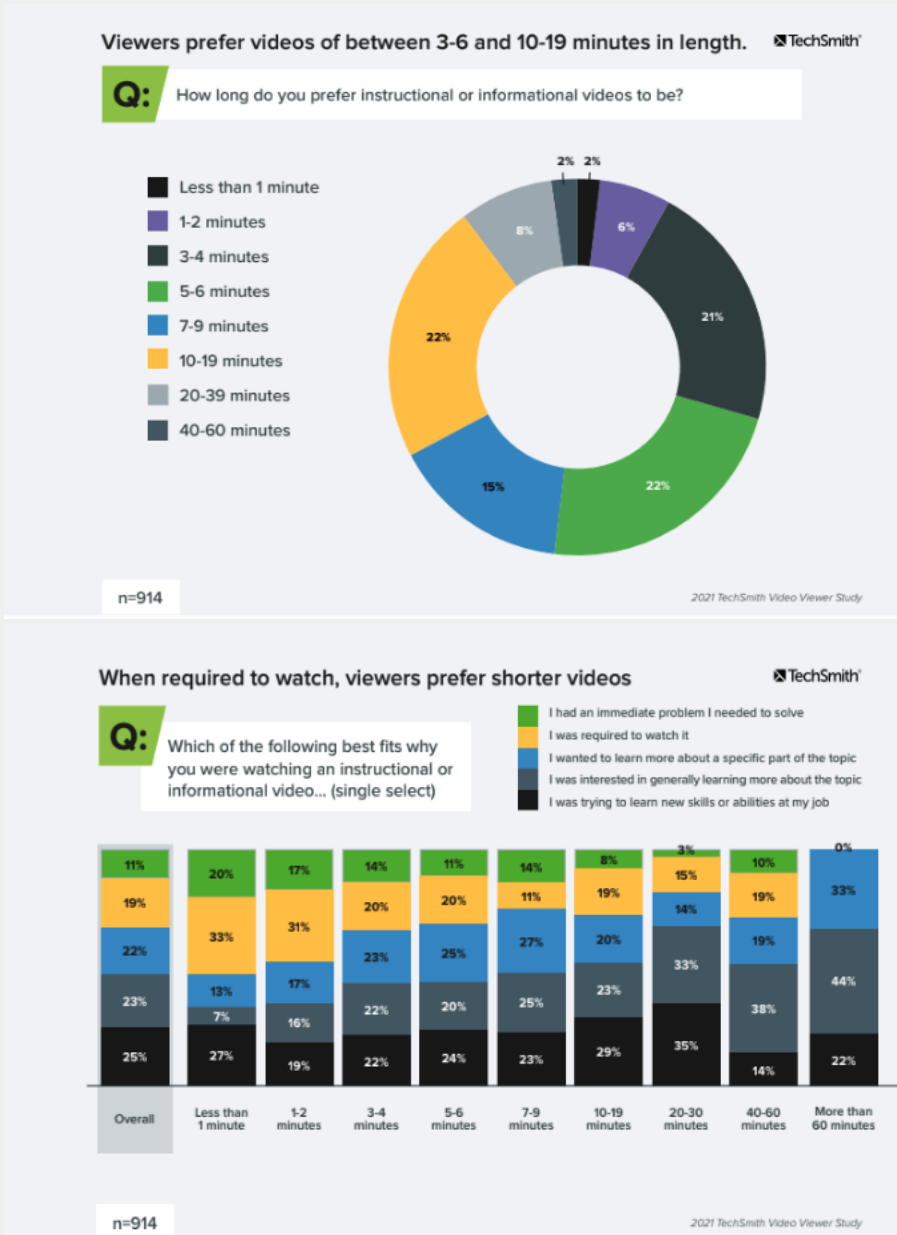
Production values should be engaging and informal, and in line with What types of instructional videos do people watch - informal being #1.

**It came up at the top of my search results**

This is related to description and titles, however text transcripts can also offer keyword density for discovery - even if they're not consumed on the page by the viewer of a video.

include enough textual context alongside videos to enable your search functionality to consume and understand the content for their indexes.

### Optimal Length Of Instructional Videos



### Viewers prefer videos of between 3-6 and 10-19 minutes in length

Keep your Customer Education videos to 10-15 minutes each for a bite sized learning strategy. The best video length is as long as needed, but as short as possible.

Where users are trying to learn new skills or abilities rather than solve immediate problems, longer content total time (such as structured courses made up of shorter video content lessons) appear to be preferential

**Engagement**



This word cloud from the Techsmith survey was sourced from asking respondents to describe a video they'd watched recently that they'd found particularly engaging. It provides a good snapshot to measure video content by.

36 “The person who was talking looked like they didn't want to be doing the video and that they were forced.”

36 “They didn't capture my imagination or interest.”

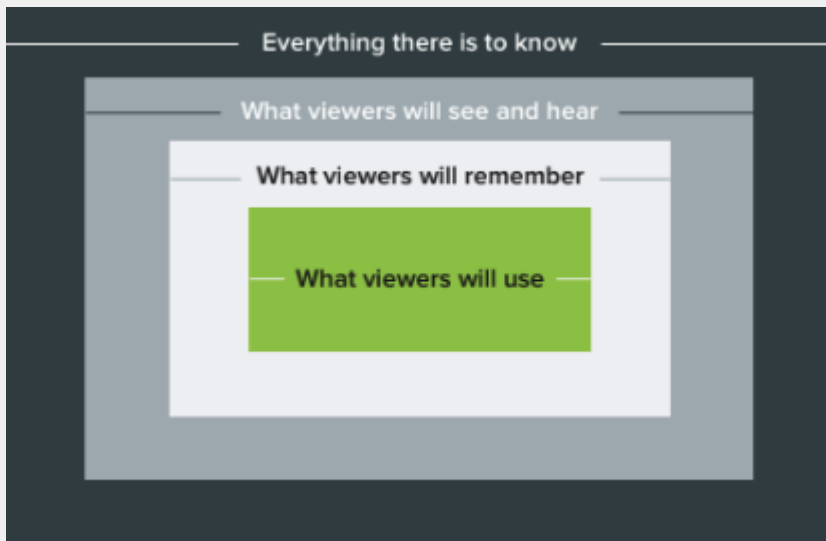
36 “The speaker was enthusiastic, interested in the topic, and was knowledgeable and credible.”

Presenting content with a positive, helpful tone will support the video's perceived effectiveness. It doesn't need to be an artificially enthusiastic or insincere approach; go for a helpful manner, convey genuine interest in the topic, and, if appropriate to the content, a fun tone.

The overall feel of an instructional or informational video should be, “I want to help you.”



## Content Focus



Viewers prefer content that is focused, easy to follow, and covers the promised topic.

It's easy for video projects to turn into runaway trains, and it's tempting to keep adding just "one more thing" to the script. Unfortunately, providing too much information can lead to viewer dropout.

When asked why they stopped watching videos, respondents said "There was too much off-topic banter," "The intro was too long," and, "There was too much empty talk that had nothing to do with the title."

Find your 20%. Many people approach training with a view of forcing everything there is to know into a video, which adds length and sometimes causes the content to veer off topic.

Think of the content as a big box: Rather than start from the outside and try to fit it all in, start in the small box at the center. What key points must the viewer receive to solve their challenge?

Things to avoid / improve



Some of the common reasons for viewers disengaging with a video (essentially things to avoid)

**I received the information I needed**

Keeping the content focused avoids engagement drop off before the video is complete. Ideally you want the user to drop out as close to 100% viewing as possible. This is related to the Engagement & Content Focus sections.

**I was not getting the information I expected / I was bored/it wasn't interesting**

By following guiding principles in this playbook we can ensure that content delivers on it's promise

**I got distracted by other work tasks**

Clearly setting expectations on time to invest (video length) and outcomes in the description of the video can help users decide to prioritize their attention.

**The quality was poor**

This ties in to ‘Professionally produced training videos’ being #2 in ‘Types of instructional videos watched’. You should maintain high video production values

**Style & Content Characteristics**

What	Total Rank
Clear audio quality	1
Camera video was clear	2
Professional style/graphics (e.g. text overlays, lower thirds, etc.)	3
Speaker/person appearing on screen	4
Focus indicators to know where to look (e.g. mouse cursor in a screen recording, etc.)	5
Visible speaker in the recording or picture-in-picture used	6
Video from multiple angles	7
Background music	8
Large amounts of motion (e.g. changes/movement in video, switching between clips, etc.)	9
Transition effects	10
Animated characters or sequences	11
Whiteboard drawings	12

What are the top 5 important style & content characteristics to have in an instructional video?

**Clear Audio Quality**

A good microphone and recording environment are essential for high quality video production. Here are some tips for creating a good audio recording.

Tie clip mics (Rode Smartlav+) or condenser mics (Blue Yeti or similar) provide better audio than a microphone built into your computer (which is not directional and picks up room sound)

Avoid recording in rooms that are equally square or have a lot of bare walls, glass or other reflective surfaces. Ideally record in a carpeted room that has soft furnishings to soak up sound reflections.

Be aware of ambient noise, fans, building sites nearby, computer noise, dogs barking, birds cawing etc.

### **Camera Video Is Clear**

Most laptops and phones can record HD video (1920x1080 or 1280x720) - it should be avoided recording at any lower resolution to avoid pixelation when viewing full screen. This applies to screen recordings as well as pieces to camera.

If you are using an application to record your screen or yourself, check the video resolution settings in the application before you start recording.

For Mac using the Quicktime application included in MacOS is a good option for both screen recording and pieces to camera.

For Windows (or Mac) [OBS Studio](#) is a free application to record both pieces to camera and [screen recordings](#)

Loom and Zoom are also tools that can be leveraged however attention should be paid to the video resolution settings when recording - make sure these are set to as high a resolution as possible - at least 1280x720 or 1920 x 1080 minimum (if these resolutions are available).

### **Professional style/graphics**

Software such as [Camtasia from Techsmith](#) can create professional graphics, overlays & lower thirds that lift an instructional video as well as provide professional video recording editing tools .

### **Speaker person appearing on screen**

Where possible it's better to include picture in picture speaker video in addition to screen recording as this provides an additional element of trust and engagement.

### **On screen focus indicators**

Mouse pointers or hotspots appearing on screen can train users' eyes on important areas of the video. Pan and Zoom is available when editing in Camtasia which can be useful for magnifying hard to see areas of the video, however Pan and Zoom should be used sparingly since it can cause visual disturbances for the viewer if this is overused or the effect is too fast.

## Title & Description Tips

1. Make video titles clear on what the video is about so users understand what the content is before they press play
2. What keywords will the viewer be searching for? Make sure these keywords are included in the video title and description
3. If the video or content relates to a particular version of the software - release notes for example - include that information in the title and description.
4. Check your titles on a headline analyser such as [Capitalize My Title](#) for readability - if you can get it above 70 for readability you're doing well
5. Make it short and snappy, imagine each word costs \$1000
6. Tell people what to expect in the title and start with the most important information in the description. Ideally you'd start with describing the outcome or what they will achieve by watching the video. This sets expectations clearly that its worth watching.
7. Write like a human!

## Thumbnails

The video's thumbnail image is the first thing the viewer will see. A good thumbnail provides context about the video.

1. Always set a thumbnail that provides a clear snapshot of the topic/content
2. Set a consistent design across a series helps with branding and draws viewers to additional videos
3. Include company branding in the thumbnail so it's clear the information comes from your company wherever it appears

## Brand Guidelines - Company Style Tile

When designing video graphics or thumbnails, it's important to keep to your brand guidelines for consistency.

You should make sure colors conform to the exact hex/rgb color codes and that the correct brand fonts are used throughout the content production process.

## Captions

Caption all your video output, there are a number of tools available to facilitate this. For pre-recorded video output that is not captioned at source we use [HappyScribe.com](#), a self service AI based captioning and transcription tool.