

Video Producer Initial Client Meeting Checklist

☐ **1. Preparation Before the Meeting**

- Revise this checklist based on the information you have received from the client.
- Review client's website, recent social media posts and previous work.
- Prepare examples of similar work that you feel would make a good reference.
- Draft a few creative ideas or ways to improve the process and stay within budget.
- Bring a note-taking tool (digital or notebook) or ask to use AI to take notes.

☐ **2. Understanding the Client's Vision**

- Project goals: What do they want to achieve?
- Target audience: Who is the video for?
- Key message: What's the core takeaway?
- Style & tone: Documentary, cinematic, corporate, animated, etc.
- Distribution channels: social media, TV, website, internal use.

☐ **3. Project Scope & Logistics**

- Expected length and format of the video.
- Timeline and key deadlines.
- Budget range and flexibility.
- Location(s) and any special requirements.
- Talent needs: Actors, voiceover, employees, product etc.

☐ **4. Creative Direction**

- Visual references or brand guidelines.

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- Music preferences (genre, mood).
- Color palette and typography (if applicable).
- Any “must-have” shots or scenes.

☐ **5. Technical & Legal Considerations**

- Permissions for filming locations.
- Release forms for talent.
- Copyright/licensing needs for music or footage.

☐ **6. Next Steps**

- Summarize discussion points.
- Outline deliverables and responsibilities.
- Agree on a follow-up date for proposal or storyboard.

 **Pro Tip:** End the meeting by restating their vision in your own words – it reassures the client you understand them and builds confidence in your collaboration.