THE VIDEO PARTNER CHECKLIST

Choose an enterprise video partner with confidence.

Five steps, eight things to judge, fifteen questions to ask and a one-page brief. Print it, share it with your team, and use it on every firm you talk to.

THE FIVE STEPS

01
Pick the type
Studio, local studio, platform, subscription or AI tool.

02
Shortlist three
Firms that have made similar films for organisations your size.

03
Judge on eight
Use the scoring grid on page 2.

04
Same brief to all
Use the brief on page 3 so you compare like with like.

05
Agree in writing
Sign-off points, rounds of changes, rights, how success is measured.

STEP 1: WHICH TYPE OF PARTNER DOES THE JOB NEED?

Studio with its own offices
Best for: Consistent films across many countries, with strategy and measurement.

Local studio
Best for: One market, close collaboration, fast decisions.

Creator platform
Best for: High volumes of simple, quick-turn content.

Subscription
Best for: A steady flow of edits and design on a monthly fee.

Network agency
Best for: Video as one part of a wider ad campaign.

AI avatar tool
Best for: Training updates in many languages, fast.

Tip. Decide the type before you compare names. Most bad hires happen when a firm built for one kind of job is asked to do another.

STEPS 3 AND 4

Judge every firm on the same eight things.

Circle how much each one matters to you (1 to 5). After each pitch, write a score from 1 to 5 in the firm's box. Multiply, add up, compare.

WHAT GOOD LOOKS LIKE	MATTERS	FIRM A	FIRM B	FIRM C
Proof of similar work 3+ films for organisations like yours, with brief and result explained	1 2 3 4 5	☐	☐	☐
Independent reviews Dozens of verified reviews, incl. large organisations; references you call	1 2 3 4 5	☐	☐	☐
Strategy before production A named method, and a treatment you sign off before filming	1 2 3 4 5	☐	☐	☐
Measurement after release KPIs agreed up front; results for named clients, checked by others	1 2 3 4 5	☐	☐	☐
Reach Own people in your key markets; proven crews elsewhere; your languages	1 2 3 4 5	☐	☐	☐
Enterprise readiness Security pack, insurance, captions, sample contract, ready on request	1 2 3 4 5	☐	☐	☐
Process and pace Written timeline, one lead producer, set revision rounds, reply promise	1 2 3 4 5	☐	☐	☐
Commercials and rights Itemised quote, clear usage rights and term, options to buy a year	1 2 3 4 5	☐	☐	☐
Total				

WALK AWAY IF YOU SEE

- A script before a single question
- Results nobody else has checked
- A reel, but no case studies
- One price, no breakdown
- "We can film anywhere", but no names
- Vague on music, talent and footage rights

STEP 4: THE PITCH

Fifteen questions to ask.

- [ ] **1.** Which project of yours is most like ours, and what happened?
- [ ] **2.** What would you challenge in our brief?
- [ ] **3.** Who exactly will work on our project, and who is accountable day to day?
- [ ] **4.** What do you need from us before you write anything?
- [ ] **5.** How will we know whether the film worked?
- [ ] **6.** Which result are you proudest of, and who verified it?
- [ ] **7.** Can we speak to two clients of our size?
- [ ] **8.** Who from your own team will be on set in each country?
- [ ] **9.** How do you keep quality consistent across crews?
- [ ] **10.** Can you send your security pack, insurance and a sample contract?
- [ ] **11.** How do you handle captions and accessibility?
- [ ] **12.** What counts as one round of changes, and how many are included?
- [ ] **13.** What happens if we change our minds after the shoot?
- [ ] **14.** Who owns the raw footage, and how long can we use the music and people in it?
- [ ] **15.** What is not included in this quote?

STEP 4: THE BRIEF

Send everyone this one page.

1. Who we are, in two lines

2. The audience, and what they think or do today

3. What they should think, feel or do after watching

4. How we will measure it

5. Where it will run (channels, formats, languages, countries)

6. What we need (number of films, lengths, cut-downs)

7. Who signs it off, and how long each needs

8. Must-haves and no-go areas

9. Budget range (US$)

10. Key dates (sign-off, shoot window, launch)

11. How we will choose (criteria and weighting)

WANT A SECOND OPINION ON YOUR SHORTLIST?

Send your brief to info@casualfilms.com. A producer replies within two working hours.

Casual