

# Quick and Dirty Curriculum Design

One of the wonderful things about a product like Camtasia Studio is its open-endedness. In other words, the software can readily adapt to the individual content needs of the person wielding it. Want a video tutorial to train new hires on filling out a supply acquisition form online? No problem. Need a demo of your software's new features to show to shareholders? You bet. Want a marketing spot to convince your target audience that they can't live without your program? Cake.

In this chapter, we'll discuss a number of items you'll want to keep in mind when creating each of these three kinds of videos. While it is well beyond the scope of this book to offer you a survey course on marketing or computer-based training, I have provided some general pointers to help your video content hit the mark. You'll also find a few good book tips at the end of the chapter should you desire to learn more (and I certainly hope you do). I decided not to inundate you with all kinds of extra background reading, opting instead to save you time by focusing on just a few really good resources, so I just picked out my top three faves for each genre. Remember, for each kind of video, there's no shortcut to great results, and a strong proficiency in Camtasia Studio alone is not sufficient to produce a truly world-class training (or marketing or demo) video. For each goal you want your video content to accomplish (you *have* established goals for your videos, haven't you?), I strongly encourage you to learn all you can.

Keep in mind that the following sections (indeed, this and the next chapter) have a fair amount of overlapping content. What I mention as a good technique to employ for a training video might also serve you well when creating a marketing spot, so I encourage you to read the chapter straight through rather than skipping around.

# General Guidelines

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Prior to delving into the various video types and what methods work best for each, I wanted to bring up a couple of items that are vitally important regardless of what kind of video you're making. The first section pertains to knowing what makes your target audience tick and how to reach them. The second is a checklist for dealing with the internal IT policies of your own organization.

## Know Your Audience

You would think that this would be a no-brainer, but I can't tell you how many times I've seen videos where the creators clearly lost sight of the very people they were trying to reach. But *you* won't make that mistake, will you? Here are some thought-provoking questions that may help you figure out exactly who's watching. Later on, we'll examine our target audience even further through the lens of each video type.

**Who's likely to see your video?** Are you going to place the video content on your web site, with free access to anyone who wants to view it? In that case, try using a web analytics program to see who is accessing your site. If you have other (similar) videos, pay particular attention to who is viewing those. If you're a software company, and plan on restricting access to just your current customer base, it's time to start mining the customer database in order to assemble some basic information about where your customers are, who they work for, and what they've purchased. Why is this important? Well, friends, even the most basic vital statistics can tell you a lot about the direction of your videos.

- **Geographic location.** Especially if your customers come from all over the world, it's important to know where they are. If you have a lot of nonnative speakers of English in your customer base, you'll need to be careful to watch the pacing of your videos as well as the terminology you use. Your tone is important, too. What's engaging and cute in one culture could be offensive in another. If you have large concentrations of customers in a particular foreign country, consider a localized version of the video just for them (if you're making videos of your own software product, consider localizing the software itself, too).

- **Occupational data.** The professional lives of your audience should also be taken into consideration. Of course, this may already be inherent in the software you're trying to teach. For example, if the software in question is aimed at history teachers, then your job on this front is basically already done. Even if your target audience is a bit broader, at least knowing where the customer or prospect works can be of great advantage. Do they work for Fortune 500 companies? Are they mainly academics? IT professionals? Teenagers? If you're teaching to the average home user, slang phrases and cartoony title screens are more acceptable than they would be in a video aimed at corporate executives.
- **Purchasing habits.** What your customers are purchasing may not have much of an effect on the videos themselves, but their purchasing habits should have a profound impact on your priorities, and therefore the order in which you tackle the various video projects in your organization. When creating tutorials, concentrate first on the product that is selling the best. If a product is just being launched (or its sales are beginning to slip), a good marketing video may be just the ticket. In addition, your company can extrapolate other purchase information from its customer data that may have an effect on the videos you produce (or the format in which you produce them). For example, if you get a lot of volume license purchases, then consider creating a video series on CD- or DVD-ROM to include for free as a value-add.

Your web site can be a terrific tool for figuring out what your audience is looking for, especially if that's where your videos are destined to appear. Which pages are the most popular? How long do the users stay on a particular page? Analyzing these items could yield valuable insights as to which parts of your software are the most attractive to customers. Or which parts your users are really struggling with.

And for goodness' sake, don't forget to talk to the people in your organization who have the most frequent contact with your target audience. In the case of tutorials, this could be your support, QA, or training team. For demos and marketing spots, it's likely to be your advertising or marketing staff. These are the folks who are most likely to be in tune with the needs of your audience.

And here's a novel concept: In addition to collecting data about your customers (or clients or colleagues, etc.), why not simply *ask* them about the kinds of video content they'd like to see? This holds true for all video types, but especially for training videos. After all, who would know better than they what kinds of problems they're contending with? This can take the form of anything from an informal

office poll to a fully detailed online survey (complete with door prizes, if you want a high response rate). But keep in mind that this should serve to augment your other data collection efforts, not supplant them. Customers and clients can tell you what they *think* they want, but they may not be able to articulate their *actual* need. Perhaps this is because they're unfamiliar with all the aspects of your software. Or maybe the solution that they really need just hasn't been invented yet, and is therefore outside the scope of their experience. In short, listen to your audience, but don't always do exactly what they say.

## Determine All Technical Specs Ahead of Time

Although I strongly believe that learning (or selling or presenting) should never be a slave to the technology, the reality of our modern workplace is that the IT departments of many companies place stringent restrictions on what you're allowed to do from a technical perspective. You may be forced to use a particular operating system, media player, etc., while abandoning all others. Do make sure that you find out the policies of your particular situation so that you can safely work within the confines of those rules.

Keep in mind that some of these policies may not always be explicit, meaning that you're going to have to involve some other people. While some of you may be employed in an academic or small business situation where you're the sole decision maker (at least when it comes to producing video content), chances are that you're producing videos as part of a larger team effort. Be certain to include the decision makers from IT, management, and anyone else who has a stake in the content you're producing. Before recording a single frame of video on a new project, do make sure that you reach a consensus on the following points. Don't worry if you don't necessarily understand these concepts just yet; they're all covered in this book.

- **Method of deployment.** Will these videos be posted to your web site? The corporate intranet? Will CD-ROMs be created? What about a DVD for viewing on console televisions? These decisions will affect your video dimensions as well as the output format of your final production. And, whether online or on CD, it's never too early to start planning your menu navigation.
- **Maximum file size or bandwidth requirements.** It's especially important to clarify this if your organization will be hosting these videos on its servers. If you're deploying on CD-ROM, then you should try to compute how much space, on average, each of your planned videos is allowed.

- **Video dimensions.** Smaller video dimensions generally mean smaller file sizes. Larger video dimensions mean better visibility, but a corresponding high file size, plus the risk of those with smaller monitors not being able to view your creation without scrolling (bad) or scaling your content (even worse).
- **Will the videos be narrated?** Unnarrated video titles don't necessitate the hassle of setting up audio equipment, but you'll see a corresponding need for captions and text callouts. Narrated videos should ideally have a script in place prior to recording, so that you can appropriately time the recording of your segments. In fact, as you'll see in the next chapter, effective scripting and storyboarding is a good idea regardless of narration.

## Tips for Making a Top-Notch Training Video

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While Camtasia Studio is used for all kinds of purposes, training really seems to be the one that speaks to people. In the work that I do for my clients, more often than not they engage me to create an online tutorial, knowledge base video, or some other form of training. This can run the gamut from some quickie “Getting Started” videos (to give new downloaders a leg up) to a polished, menu-driven CD-ROM, complete with comprehensive tutorials on every aspect of the software, which can then be sold (or given) to those customers who have already made their purchase.

### Why Train with a Video?

Training videos can serve to augment traditional stand-up training or, in certain instances, replace it entirely. While nothing's as good as being there, Camtasia Studio, with its inclusion of picture-in-picture camera video (so that you see the face of the trainer, hear the voice, and see the screen simultaneously), actually comes pretty darned close. Training videos also have the following advantages over traditional stand-up training:

- **Videos never tire of repetition.** If users don't understand something, they can always go back and view it again.

- **Videos are scalable.** Deploy your video content to 10 people or 10,000, without a lot of extra time, effort, or money.
- **Videos travel better than people do.** If you have 20 different people who require training in 20 different locations around the world, there's no need to summon them to one spot in order to deliver training.
- **Videos are always available.** Unlike trainers, who have a schedule to keep, videos are always at the ready, even at 3 a.m. If the trainees decide they've had enough for the day, they can come back to it the following day (or week) with no worries.
- **Videos are hassle-free.** Stand-up training involves scheduling, reserving a classroom, and communicating with both the trainer and trainees to make sure everyone shows up at the appointed time. Not to mention the coffee and donuts. The logistics of video deployment are quite a bit simpler.
- **Videos can act as a “front line of defense.”** People in the IT support department love training videos because they know that those users who *never* read documentation might just take the time to watch a video. In fact, many companies build whole video reference libraries of solutions to common problems. When they receive an e-mail from a frantic customer or colleague, they can simply send a link to the appropriate video along with the tag, “Contact me again if you have any additional questions.” Simple.
- **Videos can handle the training jobs no one else wants.** I've heard of several companies who now use training videos as part of their standard new employee orientation, helping them to teach the more mundane aspects of the job, such as requisitioning office supplies or filling out a timecard. Not placing this training burden on your staff means not having to remove them from their normal duties every time you bring on someone new.

But chances are I'm preaching to the choir here — after all, you probably wouldn't have purchased this book if you didn't already know that Camtasia Studio video content excels as a training device. So, let's move on to devising the best training program we possibly can. These tips are arranged in no particular order; they're mainly here to get you *thinking* about your audience and the information you want to convey to them *before* you sit down to forge your masterpiece.

## Know Your Video's Purpose

You may be thinking, “But I *already* know the purpose. To teach people how to use the software. Duh!” But keep in mind that a tutorial can be designed to fulfill different needs. You should be considering the broader question of “Why is this video being created?” Is it to provide a basic introduction of the software to those who are trying it out? Is it an advanced tutorial for those who are already familiar with it? Is it a reference video designed to answer a frequently asked question, in order to expediently solve the user’s issue and help take the load off of your support team? Knowing why this video (or series of videos) was commissioned in the first place is always a good start.

## Learn the Basic Principles of Educational Multimedia

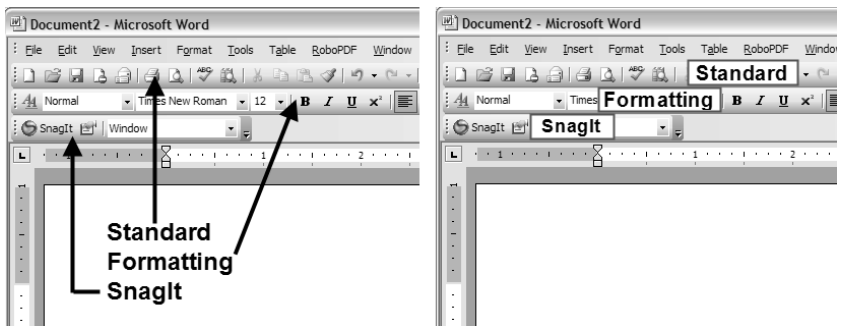
In the late 1990s, when *computer-based training* (CBT) started to gain some popularity as an alternative to traditional in-person software training, it was these same stand-up software trainers who were producing the first CBT modules. In their efforts to reach a broader audience, they created computerized training lessons, utilizing many of the same practices they had honed from years of experience in traditional training. Some of these techniques translated well to this new format; others did not. At that time, no major research in educational multimedia was available to the masses to help them adapt their training methods to a computer-based format. At least not until Richard E. Mayer’s seminal *Multimedia Learning* appeared in 2001.

Throughout the '90s, Mayer and his colleagues conducted an endless stream of educational experiments on how we learn with the aid of various media (technological and otherwise). He found that people tend to learn much better from words and images than from words alone, thus lending empirical support to learning with multimedia. From the results of these studies, Mayer assembled a series of educational principles, the adherence to which greatly enhances multimedia learning. I strongly encourage you to go read one or more of his books on your own, but for now, please allow me to provide a condensed list of Mayer’s principles. Hopefully, they will aid your training efforts as much as they’ve bolstered mine.

- **People understand a multimedia explanation better when words are presented as verbal narration alone, rather than both verbally and as on-screen text (redundancy principle).** This should already be familiar to those of you who have had to sit through a dull PowerPoint presentation where the host “presented” by reading all the bullet points off the screen. If we replace those bullet points with a chart, an animation, or a screen video, comprehension can be enhanced. Filling up the screen with narration text can waste a good opportunity for engaging the brain with visual media. There are a few exceptions to this principle, such as when introducing unfamiliar terms, or when the audience members are hearing impaired or nonnative speakers of your language. In those cases, you’d *want* to reinforce narration with text. Fortunately, Camtasia Studio offers text callouts as well as captioning to address these situations.
- **People learn better when information is presented in bite-sized chunks (segmentation principle).** For our purposes as video content providers, this principle has a profound impact on how we split up our content. For tutorial videos, I typically find that three to five minutes for each “chapter” works best. As you work your way through the book, I’ll show you techniques for dividing your content automatically, and even creating a clickable table of contents, so that your users can seamlessly navigate your segments.
- **People learn better when information is presented using clear outlines and headings (signaling principle).** When utilizing Camtasia Studio, the signaling principle is instructive in a number of ways. First, it illustrates the importance of using title screens to announce your content. People seem to have an innate need to know what to expect. Title screens help to convey this information. The running time and duration displayed in the video’s control bar aid in this as well, by informing the audience how long the video has been playing and, more importantly, how far they have to go. The users can then plan accordingly depending on how much free time they have in their day.
- **People learn better when information is presented in a conversational style rather than a formal one (personalization principle).** I think most people know this from experience on a conscious level, but I still see countless demonstration videos where the narrator is as stiff as a board. It’s usually the result of committee review where any shred of the creator’s personality is

systematically removed for the sake of “professionalism.” This is a mistake. When narrating your video segments, you need to stay warm and approachable, which includes both your terminology and your tone. And this doesn’t mean I’m necessarily advocating the use of gutter slang. It is possible to be both informal *and* professional at the same time. It can be a balancing act, of course, but the rewards are great if successfully executed.

- **People learn better when on-screen text is presented near any corresponding images (spatial contiguity principle).** This principle comes into play when placing callouts in your video. As an example, take a look at the two screens below:



Which diagram do you find clearer?

So please don’t glue the users’ fingers to the monitor, forcing them to trace a maze of lines and arrows in an attempt to figure out what text goes to what graphic. It makes people confused, as well as making them smudge up their monitors with fingerprints...

- **People learn better when any extraneous information is removed (coherence principle).** This is definitely something you want to be cognizant of while recording. Remember to keep the focus on the material you want to convey, and eliminate everything else. If your Windows desktop is going to be recorded at any point, then for goodness’ sake, change that funky desktop wallpaper to a solid color. Move any nonessential icons out of the recording area. Close any renegade windows. You want to make your recordings as clean as humanly possible. In addition to trimming out all the junk mentioned above, take care not to add irrelevant words, sounds, pictures, or music, as these can actually serve to hinder the audience from absorbing the material.

- **People learn better from animation and narration than animation with explanatory on-screen text (modality principle).** Of all the human senses, multimedia presentations typically engage two: sight and hearing. These are individual receptors, or pathways into the brain, and the reason that multimedia learning is successful has to do with the brain's efficiency at receiving information from both these pathways at once. But there can be bottlenecks, as the modality principle demonstrates. By presenting animation, and then adding written narration (as opposed to audio) on top of that, you're overloading one of the pathways, while the other one goes completely unused. When crafting your videos, it behooves you to balance the load.
- **People learn better when animation and narration are synchronized than when they're asynchronous (temporal contiguity principle).** When the video and audio are synchronized, the learner tends to more strongly build connections between the words and the picture, thereby improving their ability to form an accurate mental representation of the content you're trying to get across.
- **The design of multimedia presentations can have different effects on people based on their prior knowledge, visual literacy, and spacial aptitude (individual differences principle).** This is a fancy way of saying that everybody's different, particularly in terms of how they experience (and have experienced) the world.

There is no “one-size-fits-all” video experience that will appeal to everyone. But by following some of the principles above, your chances of truly getting the content across to your audience are actually quite good.

## **Recording Techniques for Training Videos**

Here are a few handy tips for recording your training video once you've moved past preparation and into recording. While these techniques clearly do not fall under the category “prep-work,” their use specifically for training merits a spot in this chapter.

### **Make Liberal Use of Attention-Getters**

Tutorial content should ideally guide the user through the use of the software with as little effort required on their part as possible. Particularly if the procedure you're demonstrating has a lot of mouse

movement and mouse click activity, using attention-getters such as mouse highlights, visual clicks, graphics and text callouts, and zoom and pan techniques can help to simplify what may otherwise be a long and confusing set of steps. Remember, what's obvious to you as a content expert may not be quite so clear to those who are just getting their feet wet with your software, which brings me to my next point...

## **Slow It Down**

The pacing of a video can vary wildly depending on its purpose. A marketing spot needs fairly fast pacing to keep the viewer's attention while conveying the core benefits of the product in a 30-second to 2-minute long clip. Conversely, tutorial videos necessitate a much more relaxed pace. When running your audience through the procedural steps of executing a task on the computer, it's remarkably easy to lose them if you go too fast. Additionally, if you're likely to have non-native speakers of your language viewing your video content, you'll want to be especially careful with the pacing, and remember to slow down the pace of your narration as well.

The nice thing about having tutorials in video format is the ability to provide a control bar by which the users can navigate your video, even playing back segments they haven't thoroughly understood. While this is certainly an added benefit, not every user will take advantage of it (in fact, a few might not even know how the navigation works). Good controls, while helpful, cannot take the place of good pacing.

## **Don't Get Mired in the Details**

Avoid the temptation to merrily skip from field to field in the program you're recording, explaining every little thing along the way.

Provided you've done a thorough assessment of your target audience, you probably have a decent sense of their general level of technical savvy as well as their pre-existing knowledge (if any) of the application(s) featured in your video. You can use this information to help you decide how granular you want to be in explaining the different aspects of the software. Rarely will you need to explain every field in every tab of every dialog box, or how to perform basic functions within Windows. For example, even novice computer users know how to close windows, open files, and select icons. If you make a point of telling them, "you'll need to double-click the program's icon in order to open it," then you're wasting valuable time, and you risk boring most of your users into exiting the video.

## Set Specific Goals

It is my recommendation, regardless of video type, that you have certain predefined goals outlined before recording or even scripting begins. These goals need to be as specific as possible.

### Bad example:

- Take users through the new features of the software.

### Good examples:

- Show users how they can draw attention to certain words by utilizing the *italic*, **bold**, and underline commands.
- Help users to move projects from their desktop to their laptop computers by first exporting a project on one machine, and then importing it on another.

Do you see how these good examples delve into more detail? Also notice that in both examples, I've given the reason why this feature is beneficial. Writers do occasionally need to place extra emphasis on certain words. And road warriors must often transfer their work between their computers. This is a critical component. By remaining cognizant of exactly how the covered feature is going to improve the lives of your audience, your tutorial can stay focused on the most expedient way of attaining that benefit. And that's what we want: to get quickly yet comprehensively from Point A to Point B, giving users everything they need to know without adding a bunch of superfluous information. After all, this is a tutorial, not a knowledge dump. As tempting as it may be, you must do your best to avoid tacking on a series of "Oh, by the way..." remarks. While usually done with the good intention of being thorough, these additions typically only serve to confuse viewers and detract from that feature's main benefit.

Now, in the next section on marketing videos, we're going to talk a lot about benefits. The first thing taught in any book or course on copywriting is to always focus on benefits rather than features. Allow me to put forth the theory that training videos are no different in this regard. In order to create a top-quality tutorial, you must not only show them *how* to perform a given task, but also start out by telling them why they would *want* to. You're still focusing on the benefit, informing them as to how this feature is going to solve their problems. The difference with the tutorial video is that you then lay out the steps they'll need to perform in order to bring that benefit to fruition.

# Tips for Making a Masterful Marketing Video

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In this section, I'll be providing some general guidelines as to how you can make videos that will make you money. While tutorial videos have a decided focus on the *how* of using your software product, marketing videos instead focus on the *why*. Why should the audience care? Why do they need your product? How is it going to solve their problems, aid their efficiency, and generally improve their lives? It's up to your video to tell them. A smartly done marketing spot that truly addresses the users' needs will soon leave them smacking their foreheads and reaching for their wallets. Of course, in-person sales demos, brochures, and other media can do the same thing, so let's talk for a moment about the specific advantages offered by a video.

## Why Sell with a Video?

There are a number of ways that a screen video can pull its weight as an essential part of an overall sales/marketing strategy. Consider the following:

- **Videos never take time off.** Consumers and even business-people don't always adhere to normal business hours when researching new software purchases. You may well have sales-people whose exclusive domain is to make cold calls, follow up on sales leads, and close the deal. But they can't be around 24x7. Videos don't sleep, don't take breaks, and, unlike your salespeople, can serve hundreds or thousands of potential customers at once.
- **People don't read.** When browsing your site, it's astounding how little people actually read. They will quickly scan a page's content, and decide within five seconds whether said content merits a second look. But it's amazing just how often those same people who shy away from a full page of the usual marketing blah-blah will take the time to watch a video. I once had a client who told me that after embedding a video I created for their home page, the average time that users lingered on that page more than tripled, and the number of both downloads and purchases increased substantially as a result.

- **Prequalify your leads.** A video can help take the heat off your sales team by addressing initial concerns and removing purchase objections before ever talking to a sales rep. Some people don't relish approaching a salesperson early on in their purchase process, out of fear that the rep will harass them with constant follow-ups. After watching the video and feeling a bit more comfortable with the product, the prospect can then target your sales staff with specific questions and, if all goes according to plan, their credit card number.

## Know Your Video's Purpose

The ultimate purpose of any marketing video should obviously be "Sell more of our product." But the purchase process consists of numerous steps, and you'll need to determine exactly where you envision your marketing videos fitting into that process if you want them to be effective.

For example, does your product offer a free trial download? If so, then your video might serve as a springboard for increasing your download rate. In this case, you'll want to mention in the narration that you offer a demo, being sure to use words such as "new," "risk-free," "fully functional" (if applicable), and the mother of all magic marketing words, "free." If creating a Flash video, you might also want to add a clickable link to the end of your video that starts the download right away.

If you're selling higher-cost B2B software, and the goal is therefore to persuade the customer to call a salesperson, then placing all the appropriate contact information at the end of the video is essential. In fact, I had one client who had me add their toll-free number as a watermark for all their videos, so that a person could pick up the phone at any point while watching the video and immediately contact a sales rep.

## Address the Customer's Need

As I mentioned earlier, the core component of the marketing video is to target the user's *need* rather than blathering on about features. The individuals you're trying to reach are busy people with problems to solve. It's the job of your marketing department to figure out what those problems are. It's your job as a video creator to convey the solutions to those problems in a quick and compelling way. At barest minimum, you have to know the difficulties that your potential

customers are experiencing and how your solution helps alleviate that pain. This probably means having a good, long sit-down with the marketing team (that is, if you're not already part of the marketing team) to hammer these things out.

Unlike a demo video, where the target audience tends to be more specific, marketing videos are generally aimed at a very broad audience, possibly the entire potential customer base. But you should still try to find out as much about your target markets as possible, and address the needs that apply to the greatest percentage of them. If your target markets are really segmented, you may want to consider a special video for each group, rather than trying to kill multiple birds with one stone. As an example, let's take a product that I'm somewhat familiar with — Camtasia Studio. This is a product that appeals to a variety of groups, and for a variety of reasons. Let's look at a few possible markets, with a benefit for each one:

- **IT managers.** Construct a library of “how-to” videos so that users aren't bugging you all day long when they could be helping themselves.
- **Educators.** Put lessons online to help your students better prepare for their exams.
- **Law enforcement.** Collect computer-based evidence to help prosecute an online predator.

For each of these groups, we've identified the *unique selling proposition* (or USP), the main benefit that might convince one of these folks to dig out a credit card. The USP could actually contain several benefits. If you have three or four solutions that apply to each individual group of potential users, then it makes good sense to craft a video for each audience.

It might take some digging to find the USP. While it's beyond the scope of this humble book to give you a crash course in marketing, here are a few basic ideas as to where you might look:

- Go to conferences and trade shows that are specific to your business, and talk to your customers. If you have permission to contact them via other means such as phone or e-mail, do so. Ask them what prompted them to buy. You might also inquire about key benefits they've since discovered that would have made their purchase decision that much easier had they known about them at the time.

- Invest in a good web analytics package and take a good, hard look at what your visitors are doing. What pages are they visiting the most? Where are they spending most of their time?
- Mine the customer database. Take a look at what your customers do for a living (provided your software isn't exclusive to a particular industry). Who are your cash cows? What are the niche industries you might exploit?

Once you've found out what benefits make up your USP, you should try to rank them in order from most to least important. Why? One of the core tenets of selling is to always start with the most compelling benefit first and work your way downward. People may not stick around long enough to view the rest of the video if you leave all the good stuff for the clincher. Give them what they want to know up front.

## **Remember to Ask for the Sale**

I have seen some truly amazing marketing spots created with Camtasia Studio, complete with a rock-solid USP, tight pacing, and terrific visuals. But then they trip right at the finish line by not telling the users what they need to do next! Remember, watching your video is but one step in the overall sales process. You need to do everything you can to guide viewers gently on to the next step. If that step is online purchase, you need to include a link to your purchase page. If it's to download your demo, you should provide a link to that. If it's to contact a sales rep, give the audience all the contact info they need, from phone numbers to e-mail addresses to your office hours (so that they're sure to actually reach someone).

And always, always, always specifically state in your narration what the next step is. When your video already has your prospects salivating over all the time and energy your software is going to save them, don't mess it all up by making them play detective in order to complete the purchase. Take them by the hand.

# Tips for Making a Dynamite Demonstration Video

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When Microsoft released the first version of PowerPoint back in 1990, no one was prepared for the way it came to change how ideas are presented in corporate, nonprofit, and academic environments alike. Unfortunately, the tool is really only as good as its wielder, and most PowerPoint presentations you'll see today are a listless sea of bullet points. Part of this is simply due to the way PowerPoint is constructed. After all, bullet points are astoundingly easy to do; they practically write themselves. One possible refuge from this tedium is a software product that can deliver with “bullet point ease” a series of visual elements that are much more compelling. So, let's talk about how Camtasia Studio can help you present like a pro.

## Why Present with a Video?

Whether done as a critical part of an overall presentation or as a stand-alone kiosk-style demo, using screen video for demonstration offers a number of advantages, including the following:

- **Videos never tire of repetition.** In the past, I've gone to software trade shows where I had to deliver the same presentations 10 times or more in a single day. A video remains fresh from sunup to sundown, and it never gets laryngitis.
- **Videos don't require an Internet connection.** In demo situations where there's a risk of having no Internet connection, a video can show off your web application with no net access required. And on a related note...
- **Videos can show off intranet and enterprise-wide software.** You can record and demo content that would otherwise require being on-site at your company.
- **Videos can be there when you can't.** Emergencies can occasionally come up. Even if you can't make that conference due to a death in the family, you can still be there in spirit by creating a video demonstration. Sending off a video is also considerably cheaper and less time-consuming than sending human beings.

- **Videos can react quickly to time-sensitive opportunities.**  
Sometimes a situation will arise where you'll need to pitch your product to someone who needs to make a decision right away. Rather than flying all over the world to put out these fires, just fire off a customized demo video instead.
- **Videos can be an excellent primer for an in-person visit.**  
By sending your audience a demonstration video just ahead of your actual visit, you can make the time you spend with them much more focused, as opposed to expending a bunch of your allotted "face time" on covering the basics. Lingering questions can then be answered and any open issues clarified.

Of course, if you're utilizing a demo video to supplant an in-person demonstration, this has the obvious drawback of little or no interaction with the audience. Your audience can't easily get their questions answered; if it's not in the video, they're stuck. But a well-crafted, targeted demo video can greatly enhance or even replace an in-person demonstration. You just need to ask yourself the right questions about the video's purpose and audience.

## Determining the Video's Purpose

Of the three video types, a demonstration video carries the broadest range of goals. Or so it would appear on the surface. The demo video is actually a cleverly disguised extension of the marketing and training genres, or perhaps some sort of hybrid thereof.

The difference that marks a video as a "demonstration" has to do with its target audience, which is generally narrower. Examples of demo audiences include your company's shareholders, the attendees of an industry-specific trade show or conference, or a potential client.

Despite all the different reasons people create a demonstration, when boiled down to their essence, there are really only two purposes: *training* and *selling*.

"Not my demo," you may be saying. "Mine is to show the new features of our product to management."

Nope. Sorry. Wrong. The real purpose goes deeper than that. Let me take an anecdotal moment to tell you why.

It may surprise you to know this, but my original vocational pursuit wasn't to become a video creation guru. This is pretty typical for multimedia designers. No one ever aspires to become one; we just sort of "fall into it" from other disciplines. I actually had a hankerin' to become an actor. I got bitten by the theatre bug (nasty little critter) at a young age, and declared my theatre major two weeks into my

freshman year of college. I dove right into a variety of theatre-related classes, including acting courses based on the teachings of Konstantin Stanislavsky.

Stanislavsky put forth the notion that in order to create a truly realistic character, actors should study their character's *motivations*. You never tell someone a story just for the sake of telling it. The story is nothing without the *objective* behind it. Are you trying to impress? Flirt? Threaten?

Likewise, you never show features just for the sake of showing them. You've got to get at the reasoning behind it. So let's try this again:

"My demo is to keep management in the loop on all the new features of our product."

This is a little better. Keeping the folks informed is an admirable goal, but I'm afraid it's still not specific enough to really shape the construction of your demo. Aside from the fact that they probably determine your salary, why *exactly* are you keeping them in the loop?

"My demo is to keep management in the loop on all the new features of our product, so that they can get a look at the user interface screens of those features early on. That way, we can get feedback earlier in the process, and won't have to make major UI changes two weeks before the new version is supposed to ship. Unlike last time."

Okay, now that's a workable goal! By asking yourself some honest questions about *why* this video is being made in the first place, you can do a much more focused demo. In this case, getting management on board about your UI choices is the real objective behind the presentation. I would therefore contend that this is a "selling" video after all. Selling doesn't necessarily involve hawking a product or service. It's also possible to sell ideas, such as your design for the user interface of a new software feature. Of course, if you weren't the one who commissioned this video, then you need to have a chat with the person who did. An objective of "I'm making this demo video because my boss told me to" may be accurate, but it certainly won't help you refine the video's content. Find out why they want it made.

## Finding Information about Your Audience

As I mentioned, it's the target audience that really designates your content as a demo video. While this may seem like a superficial distinction, it carries with it a variety of opportunities and obstacles that prompted me to designate the demonstration video as a separate type. Let's talk about some of these considerations.

Because the audience here is much more specific than that of a stock training/marketing video, this gives you the opportunity (or responsibility, if you're a pessimist) of really custom-tailoring your video presentation toward those individuals. For that, you're going to have to do a little homework. Possibly a lot. If this is a sales demonstration, and you're the fourth in a string of seven potential vendors being seen by this prospect, knowing their specific problems and offering a targeted solution to those problems can make all the difference.

If presenting to a larger audience (such as trade show or conference attendees), you'll want to gather as much information as possible about what makes these people tick. If you're not overly familiar with the target industry, then you need to give yourself a crash course. Try to gather some specific demographics on the people who will be in attendance at that event. The show's organizing body might be able to help you with that. Smaller audiences (such as a sales prospect) are a bit easier, because you'll probably have the ability to speak to a few of the major decision-makers ahead of time. If possible, pay them a visit. Sit down with them. Learn their story. Learn their needs.

When actually recording your video, do your best to incorporate examples from their world. If you have some sample fields to fill in, don't use generic data! This applies to both training and sales demos. Instead of talking about "widgets" and "ABC Companies," you should be speaking *their* language. You can use appropriate industry-specific terminology if you're certain everyone who's viewing your demo will understand it. Just keep in mind that your demo may end up being viewed by multiple departments, from the CEO to the IT manager to the order-takers on the sales floor. If every affected group will get different uses/benefits out of the software, consider doing a separate video for each one. Nobody wants to suffer through a long presentation of material that doesn't apply to them. The more you know about your viewers and their needs, the better your finished product will be. We'll talk more about this in the next chapter.

# Additional Reading

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## Training Videos

Ruth Colvin Clark and Richard E. Mayer, *e-Learning and the Science of Instruction*, 2nd Ed. Jossey-Bass, 2008.

Richard E. Mayer, *Multimedia Learning*. Cambridge University Press, 2001.

Alan S. Pringle and Sarah S. O’Keefe, *Technical Writing 101: A Real-World Guide to Planning and Writing Technical Documentation*, 2nd Ed. Scriptorium Press, 2003.

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Robert W. Bly, *The Copywriter’s Handbook*, 3rd Ed. Henry Holt, 2005.

Robert B. Cialdini, *Influence: Science and Practice*, 4th Ed. Allyn & Bacon, 2000.

Bryan Eisenburg, Jeffrey Eisenburg, and Lisa T. Davis, *Persuasive Online Copywriting: How to Take Your Words to the Bank*. Wizard Academy Press, 2003.

## Demonstration Videos

Cliff Atkinson, *Beyond Bullet Points*. Microsoft Press, 2007.

Peter E. Cohan, *Great Demo! How to Create and Execute Stunning Software Demonstrations*, iUniverse, Inc., 2005.

Robert Riefstahl, *Demonstrating to Win! The Indispensable Guide for Demonstrating Software*. Xlibris Corporation, 2000.

# Summary

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For each of the three common video types (training, marketing, and demonstration), there are techniques that will help you create compelling content. Regardless of the video type, you must consider two predominant factors:

- **Who is your audience?** In figuring out whom you're trying to reach as well as what that population's needs are, you can craft a video that addresses those needs.
- **What is your purpose?** While the purpose of your video may seem obvious, refining your objective(s) to be as specific as possible will aid you in planning a project that accomplishes its goals without a lot of superfluous fluff.

In the next chapter, we'll talk a bit more about how a video's audience and purpose can shape the visuals and especially the narration of your project.