Welcome!
Getting Started With Video Training

While we wait to begin, please respond to the three poll questions.
Getting Started With Video Training

Mary Whalen
Presentation Overview

- Introduction
- Designing/Developing Content
- Preparing to Record
- Recording Videos
- Editing/Producing Videos
Webinar Logistics

Please put yourself on mute now.

Raise your hand to contribute.

Please raise hand rather than chat.
Introduction
Designing/Developing Content
Preparing to Record
Recording Videos
Editing/Producing Videos
# My Background

<table>
<thead>
<tr>
<th>Education</th>
<th>Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>• BA in English; Technical Writing Thesis/Internship</td>
<td></td>
</tr>
<tr>
<td>• MA in Teaching</td>
<td>• Classroom Teacher</td>
</tr>
<tr>
<td></td>
<td>• SAHM</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Career</th>
<th>Main Expertise</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Instructional Designer/Trainer</td>
<td></td>
</tr>
<tr>
<td>• Technical Writer</td>
<td>• Software Training Materials</td>
</tr>
<tr>
<td></td>
<td>• Classroom Training Materials</td>
</tr>
<tr>
<td></td>
<td>• Online Help</td>
</tr>
</tbody>
</table>
## The Project

<table>
<thead>
<tr>
<th>Company:</th>
<th>Links Technology</th>
</tr>
</thead>
<tbody>
<tr>
<td>End User:</td>
<td>Utilities Companies</td>
</tr>
<tr>
<td>Subject Matter:</td>
<td>FERC Reporting Software</td>
</tr>
<tr>
<td>End Product:</td>
<td>User Guide + Training Videos</td>
</tr>
<tr>
<td>Development Tool:</td>
<td>Camtasia</td>
</tr>
</tbody>
</table>

**Result:** 70 + Demo Style Training Videos
Demo-Style Video Training

When is demo-style video training the right solution?
Introduction

Designing/Developing Content

Preparing to Record

Recording Videos

Editing/Producing Videos
Typical Writing Process

Writing Process

- **Plan**
  - Create Task Analysis, Outline
  - Client Reviews

- **Create**
  - Develop/Validate Content
  - Client Reviews

- **Finalize**
  - Refine/Finishing Touches
  - Client Signs Off
Video Development Process

Writing Process
- Plan
  - Create Task Analysis, Outline
  - Client Reviews
- Create
  - Develop/Validate Content
  - Client Reviews
- Finalize
  - Refine/Finishing Touches
  - Client Signs Off

Video Process
- Record Video
- Edit
  - Client Reviews
- Finalize
  - Client Signs Off
Troubleshooting

● Issues
  › Process not streamlined
  › Process did not prevent client changes

● Cause
  › Ineffective review process

● Goal
  › Bridge gap between review experience and end product
Improved Process

Writing Process
- Plan
  - Create Task Analysis, Outline
  - Client Reviews
- Create
  - Develop/Validate Content
  - Do Walkthrough
  - Incorporate Client Feedback
  - Client Reviews
- Finalize
  - Refine/Finishing Touches
  - Client Signs Off

Video Process
- Record Video
- Edit
  - Client Reviews
- Finalize
  - Client Signs Off
Final Process

Writing Process
- **Plan**
  - Create Task Analysis, Outline
  - Client Reviews
- **Create**
  - Develop/Validate Content
  - Record Video/Walkthrough
  - Client Reviews
- **Finalize**
  - Refine/Finishing Touches
  - Client Signs Off

Video Process
- **Record Video** *(if necessary)*
- **Edit**
  - Client Reviews
- **Finalize**
  - Client Signs Off
What lessons have you learned in your process for designing and developing videos (working with SMEs, scripting)?
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Dividing Up Video Content

- One complex task/group of related tasks
- Length: 3-5 minutes
- Easier to find time to watch
-Feels less intimidating
- Easier to keep viewer attention
- Simplify updates
- Navigation menu allows skipping through (but check technical requirements)
What other considerations do you think should go into dividing up video content? What is your approach?
Script Considerations

- What is on the screen?
- What action is taken?
- What is the sample data?
- What effects will be added?

Sample Video
<table>
<thead>
<tr>
<th>Visual</th>
<th>Audio/Task/Sample Data</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Visual" /></td>
<td>If you want to update the basic details of a security role, select the role, and click Update. [LICENSING ADMIN]</td>
<td>Highlight the role and Update before selecting.</td>
</tr>
<tr>
<td><img src="image2.png" alt="Visual" /></td>
<td>Make your changes, and click Update. [CHANGE DESCRIPTION FROM OR TO AND]</td>
<td>Highlight Update before selecting.</td>
</tr>
</tbody>
</table>
**Three-Column Script (Abbrev.)**

<table>
<thead>
<tr>
<th>Visual</th>
<th>Audio/Sample Data</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Image](54x413 to 706x504)</td>
<td>(Explain how to update a security role) [LICENSING ADMIN]</td>
<td>Highlight the role and Update before selecting.</td>
</tr>
<tr>
<td>![Image](72x252 to 312x318)</td>
<td>[CHANGE DESCRIPTION FROM OR TO AND]</td>
<td>Highlight Update before selecting.</td>
</tr>
</tbody>
</table>
How much detail do you add to your scripts? What other details could be added?
Video vs. Written Instructions

**Written Instructions**

Rule of Thumb
- Document fully
- Include written cues

Example:
To update the information for a user:
1. At the Configure menu, select Users.
2. At the Users list, select the user whose information you want to update.
3. Update any of the following, and click the OK button:
   - Username – Can be up to 13 characters.
   - Password – Mixed case, 6-12 alphanumeric characters.
   - Full name – First and last name of the user.

**Video**

Rules of Thumb
- Don’t be repetitive
- Use reminders
- Incorporate shortcuts/alternate navigation
- Use visual cues

Example:
To update the information for a user:
1. Go to the User list (remember that you select Configure, Users).
2. Select the user ...
3. Make your updates...then click OK.
Script Considerations

What other changes did you need to make in writing style, tone, etc. from manuals to eLearning?
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Your Recording Area

- Pick a quiet area
- Select the right kind of microphone
- For external microphone, get the right accessories
  - Floor mic stand
  - Pop filter
  - Audio software (?)
- Get a noise cancelling headset (?)
- Other concerns
  - Mic issues
  - Equipment noise (dishwasher, heater or A/C, laundry, etc.)
Do you have any other helpful hints for preparing your recording area and equipment?
Introduction
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Recording Tips

- Change mouse arrow shape
- Do mouse movement and speaking “separately”
- Decide whether to use mouse to highlight vs. adding callouts
  Ex: https://www.youtube.com/watch?v=1llOK23huas 1:50
- Keep screen dimensions consistent
- Keep the pace energetic, but leave space between ideas
- Relax!
Any other suggestions/tips on recording to share?
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Production Tips

Possible options:

- Basic editing
- Navigation
  - Title slide
  - Navigation menu
  - Topics overview
- Visual Effects
  - Pan & zoom
  - Callouts
  - Transitions
- Audio
  - Internal features
  - External software
- Music
What other production tips do you have?
Closing Thoughts
Closing Thoughts

- Key thing is information design
- Good habits make process easiest
- Time consuming for formal videos...ROI should be high
- Join online groups/get support
- Free training online
Closing Thoughts

Comments/Questions?
Thank You!

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Find me on LinkedIn