

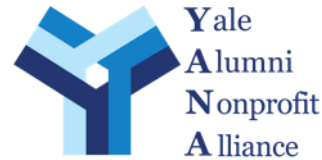
My Client is Driving Me Crazy, Now What? Amy DeLouise



Writer. Producer. Entrepreneur.
Speaker. Author. Tequity Advocate.

About Me





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About You



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What is your biggest client challenge?

① Start presenting to display the poll results on this slide.



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How often are client relationships an obstacle to your business/career?

① Start presenting to display the poll results on this slide.



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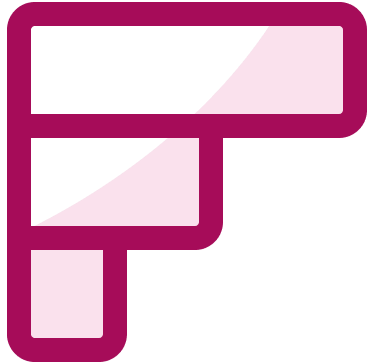


**How would smoother client relations
improve your business/life?**

① Start presenting to display the poll results on this slide.



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Rank what would make this workshop valuable to you today?

① Start presenting to display the poll results on this slide.



What We'll Cover

Setting Expectations

Tips and Tools for Feedback

Addressing Challenges

AMA Session





A Process for Setting Expectations

Define Expectations

- Scope of Work
 - Contract should clearly outline deliverables
 - Define the “What If’s”

DISCLAIMER: I AM NOT A LAWYER. THIS IS NOT LEGAL ADVICE. I HIGHLY RECOMMEND YOU CONSULT A LAWYER FOR YOUR LEGAL NEEDS, INCLUDING CONTRACTS.

Statement of Work (SOW) No.

This Statement of Work shall serve as an addendum to the Ind. September 21, 2022 (the “**Contracting Agreement**”), executed between liability company, with addresses at 5007 Druid Drive, Kensington

_____, a _____ (“**Company**”).

1. DESCRIPTION OF PROJECT.

2. SCHEDULE.

3. FEES AND PAYMENT SCHEDULE.

4. TERM:

This SOW shall commence the date set forth above, and u pursuant to the appropriate section of the Contracting

IN WITNESS WHEREOF, the parties hereto have caused this SOW to b

DELOUISE E

By: _____
(Authorized Signature)

By: _____
(A

Define Expectations

- Scope of Work

- Contract should clearly outline deliverables
- Define the “What If’s”
 - # of script drafts
 - # of video drafts
 - # of “final” versions
 - What happens if late content changes need to be made?

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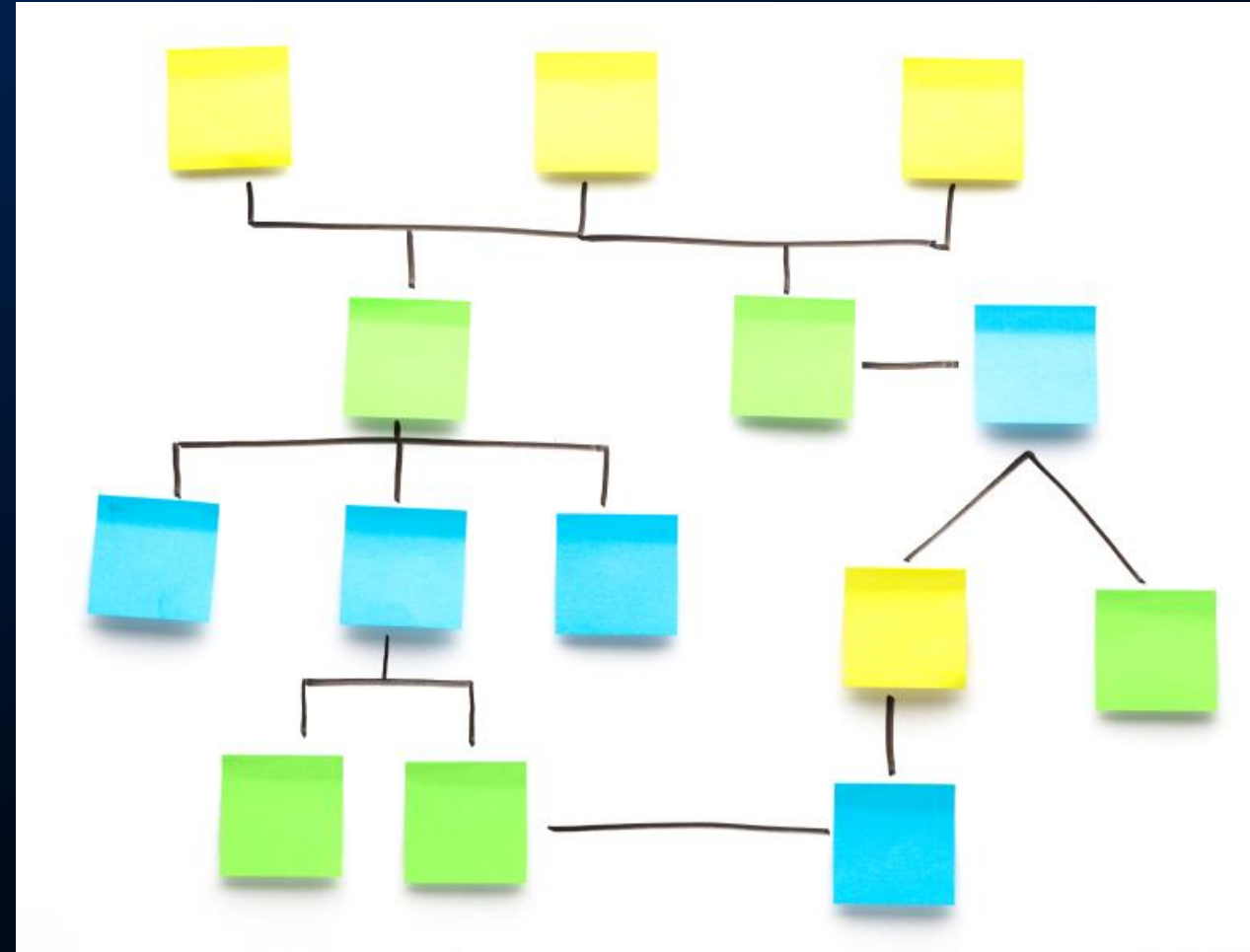
DELOUISE E

By: _____
(Authorized Signature)

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(A

Define Expectations

- Define the Schedule
 - How many business days after an approval will next deliverable be turned around?
 - Ensure higher-ups are aware of the above
 - Reiterate in writing each time a deliverable is sent
 - You burn overhead for every day the project goes past deadline, so be clear that any term extension may come with added fees **even if deliverables do not change**



Define Expectations

- Include All Stakeholders
 - Be sure key people aren't left out of the initial conversations for defining the SOW
 - If they aren't present, be sure summary emails go to all, or they are included in follow up meetings



Define Expectations

- Kick Off Meeting
 - Re-iterate project goals – “what does success look like?”
 - Ask questions to discover hidden extras– how will this be used? Will there be other versions/ deliverables?
 - Reiterate contract parameters
 - Include those who may not have been part of the negotiation
 - Friendly but firm on what constitutes a “change order”



Define Expectations

- Creative Brief
 - Goals
 - Target Audience
 - Stylistic Approach
 - Existing Assets
 - Milestones and Deliverables
 - Input & Final Approvals

CREATIVE BRIEF FOR VIDEO *Checklist*



AUDIENCE

- Who is our primary audience? (relevant demographics)
- Where/how will they consume this video? (for example, mobile, desktop, rear or front projection at an event)
- What do they already know about this topic?
- What misinformation might they have?
- What do we want them to think? feel? do?
- What is the stylistic approach best suited to this audience? Examples? (within similar budget)



ASSETS

- What are existing video, graphics, and photo assets?
- Is there a brand guide we need to follow for colors, logo use, and fonts?
- Who are the internal human resources who can contribute time/knowledge to this project? Who is the final decisionmaker?
- Who are the external experts we will need to contribute time/knowledge to this project?
- What are the budgetary resources for this project?



Define Expectations

- Technical Brief
 - Acquisition Specs
 - Delivery Specs
 - How is this project being consumed? (small screen, big screen, etc.)

VIDEO TECHNICAL BRIEF

Checklist



DELIVERY SPECS

File Type - such as 1920x1080 (1080p) common for web delivery, 3840 x 2160 (4K) for big screen or broadcast, ProRes for higher-end delivery and backup master files

Aspect Ratio - 16:9 is standard unless going to Instagram, which is 9:16

Container - such as H.264 mp4 (common for web)

ACQUISITION SPECS

File Type - 3840 x 2160 (4K) common for most flexibility & quality
Frame Rate - 29.97 fps is common
Audio - 44.1kHz is standard

QUESTIONS TO ASK

Before you shoot...

Be sure you or your video vendor know your **primary platform for consumption** (big room, mobile phone, desktop, etc.) This will inform your acquisition and delivery spec decisions.



What happens when things change?



Top Challenges from Our Perspective

Worries about

- Budget overruns
- Delivering on time
- Other projects that might now conflict
- Spending too much time chasing client decisions
- Spending too much time on change orders
- Losing creative control/vision



Top Challenges from Client Perspective

What Client Worries About

- Budget overruns
- Delivering on time
- Other things on their plate
- Didn't know so many decisions would be required of them
- Didn't realize they can't undo decisions without impacting the budget or timeline
- Don't want to bother higher-up's with decisions

What We Can Do to Help

- Build in regular touch base times
- Recommend including higher-up's at early stages—concepting, creative brief, scripting
- Offer regular budget updates
- Remind in advance about upcoming decisions and deadlines before you request
- Be clear about impact of decisions
- Propose solutions to any upcoming issues
- Make it easy for clients to say yes to your solutions

ANY QUESTIONS SO FAR?



Make Feedback Work for Both

Clear a Path to Your Mutual Goal

**Train your clients on
time-saving feedback
tools and workflows.**



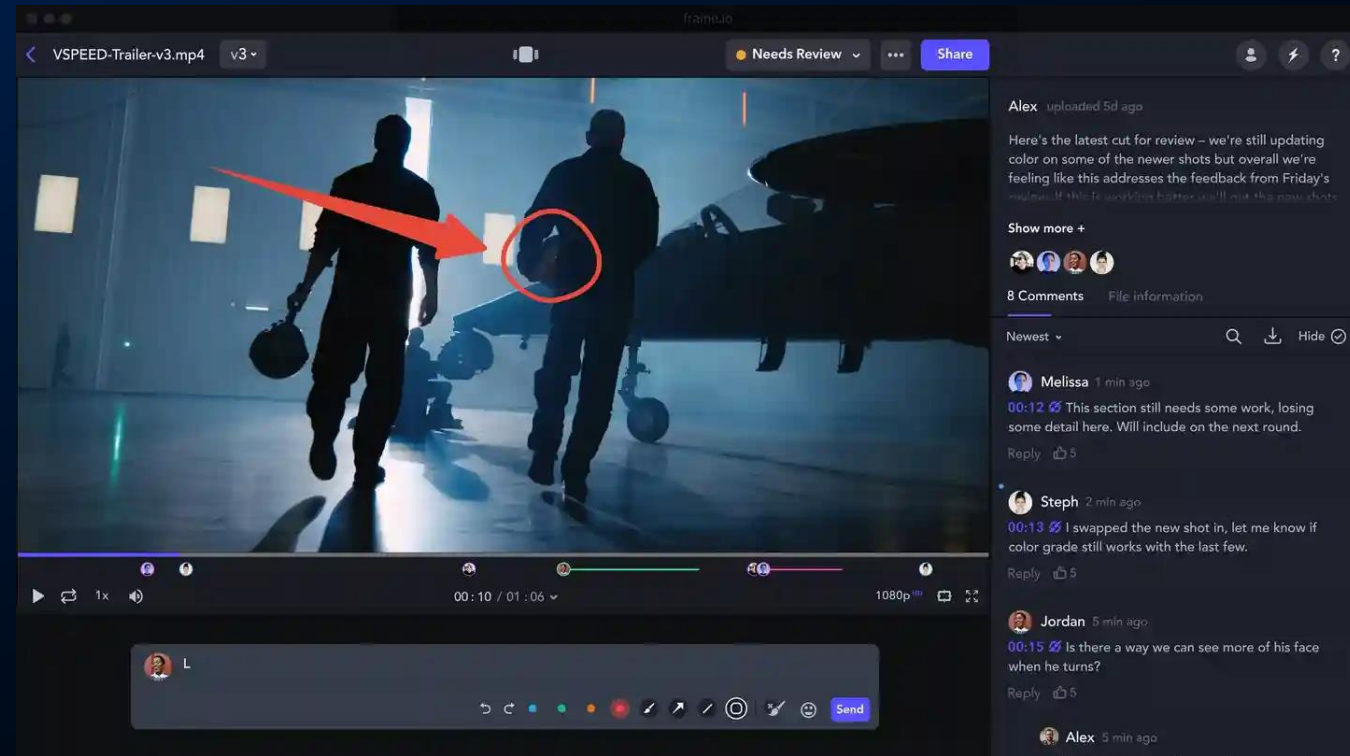
Train Every New Client

Get back the time you need.

Even if you think they already know...

- **Frame.io**

- **How** to give useful feedback and how not to
- **What kinds** of feedback do we need (picture lock? sound mix? captioning? etc)
- **Which** feedback do we need **when**?
- **Who** needs to give feedback?
- **What** happens to the feedback?



Train Every New Client

Get back the time you need.

Even if you think they already know...

- Airtable

- **How** to use the drop-down menu system
- **Where** to look for captions vs graphics/video
- **Who** needs to give feedback?
- **Which** feedback do we need **when**?
- **What** happens to the feedback?

The screenshot displays the Airtable 'ACD Content Planner' interface. The main view is a grid of social media posts. The columns are: Post (with date and time), Approval (with status like 'Approved' or 'Ready for Review'), Caption (with text), Platform (with icons for LinkedIn, Twitter, etc.), Visual (with image or video thumbnails), and Stage (with 'IN REVIEW' labels). The interface includes a left sidebar with navigation options like 'Content Calendar', 'Content Overview - Grid', and 'Content - Kanban'. The top navigation bar shows 'ACD Content Planner', 'Data', 'Automations', and 'Interfaces'. The browser address bar shows the URL: 'airtable.com/appyWs1BcvzWBZEc5/tbltLquVha1Jwp6RK/viwsJlEJN7LV63dH7blocks=hide'.

Post	Approval	Caption	Platform	Visual	Stage
ACD member Wego Chemical Group is a premier supplier. #ACDProud					consumer end-user images, not water treatment plant images)
20 March 7, 2024 4:47pm Approved	Approved	Paints and coatings help to protect indoor and outdoor surfaces. And new technologies are making them more sustainable and reducing energy consumption, too, thanks to innovations by ACD members like Arkema. #ACDProud...	LinkedIn		Replace Agriculture image with a shiny train (they get coatings on windows etc) there are some good examples on their website. such as UV coatin...
21 March 7, 2024 4:47pm Approved	Approved	Revolutionizing paints and coatings! ACD members like @Arkema_group are innovating sustainable paints and coatings, reducing #energy consumption. Dive into #innovation! Are you in #paints and #coatings? Tweet us ...	Twitter		there are some good examples on their website, such as UV coating on a building to reduce air conditioning needs ...
22 March 11, 2024 6:22pm Ready for Review	Ready for Review	Did you know that for the past 100 years of flight, airlines, manufacturers, and engineers have counted on chemicals like turbine oil, hydraulic fluids and solvents? And ACD members like Eastman make it happen! #ACDProud...	LinkedIn		Plane taking off
23 March 11, 2024 6:22pm Ready for Review	Ready for Review	For a century, aviation has soared on the wings of chemistry! ACD members like @EastmanChemCo fuel the industry with turbine oil, hydraulic fluids, and solvents. Are you in #aviation too? Share your story...	Twitter		Plane taking off
24 March 13, 2024 4:47pm Ready for Review	Ready for Review	Metal doesn't finish itself. Critical chemical technology enables metalworking for corrosion resistance, vulcanizing and more, thanks to ACD members like Viking Chemical. #ACD Proud	LinkedIn		Remove "Metal doesn't finish itself" from the graphic. Too wordy. It's fine to keep in the caption. Thanks.
25 March 13, 2024 4:47pm Ready for Review	Ready for Review	Metal doesn't finish itself. Critical #chemical	Twitter		

Train Every New Client

Get back the time you need.

Even if you think they already know...

- Hightail
 - **How** to use the Spaces system
 - **Who** should tag and how
 - **Who** has access
 - **Protocol** for file uploads



Put AI to Work

Let AI complete repetitive, low-value administrative tasks.

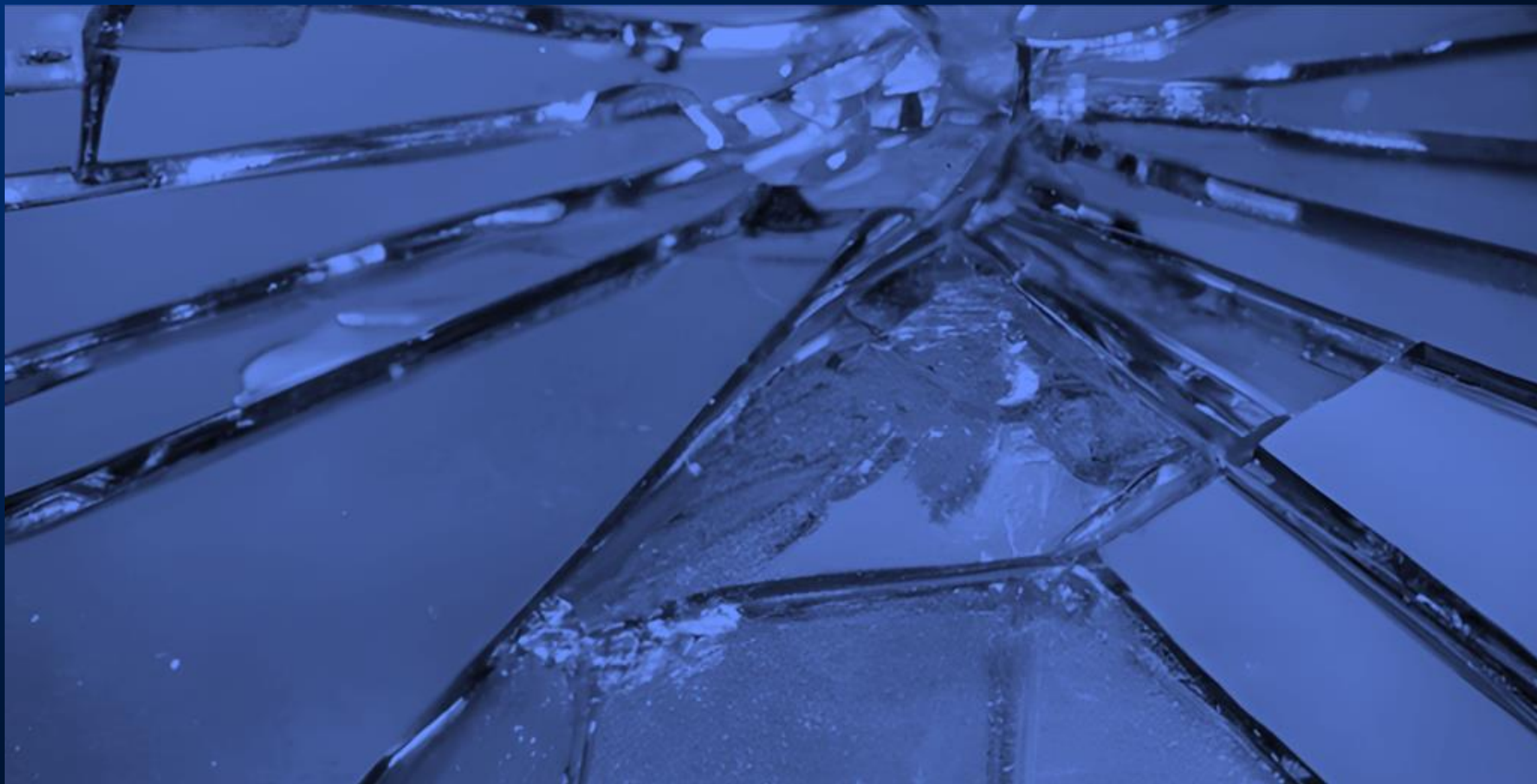
- Take meeting notes
- Automate workflow
 - Audio & Visual tools previously mentioned
 - Check out the “Butler Power Up” feature in Trello
- Create spreadsheets
- Tag financial transactions
- Locate and tag similar images
- De-dup images



Be Clear About What Happens if We Don't Pay Attention



Meetings Culture Can Shatter Your Time Management Plan



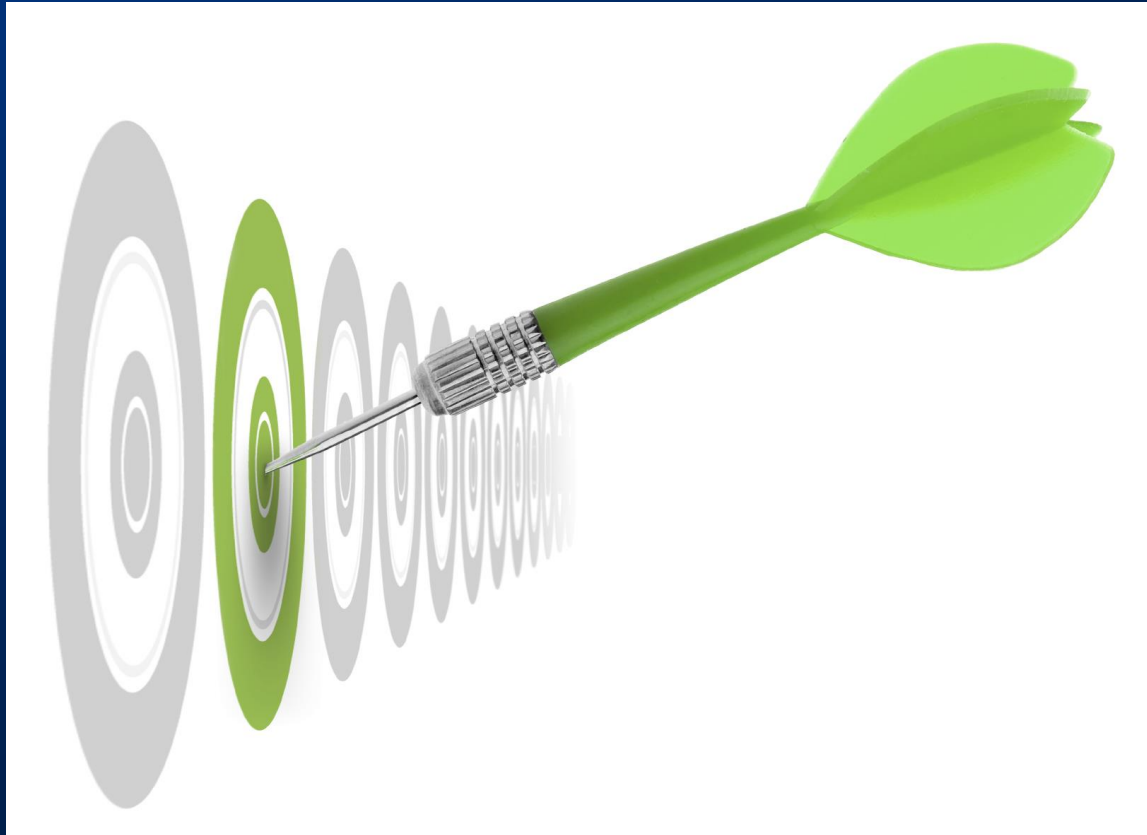
Protect Your Time

You need time to do the work, not just to talk about it.

4 Strategies

- Use Brief Standing Meetings for long-term projects (20-30 mins max)
 - Pick days/times when you are unproductive anyway (right after lunch? Thursdays at 4pm?)
- Always Use an Agenda
 - State at top that entire meeting time doesn't need to be filled if agenda has been covered
- Designate Person to Send Summary
 - Record/Transcribe (AI) Long Meetings
- Always End with Action Items





Join at [slido.com](https://www.slido.com) with #4165991

Post Questions



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Audience Q&A Session

① Start presenting to display the audience questions on this slide.



THANK YOU!



My Links



Slide Deck



POST | PRODUCTION WORLD
LAS VEGAS **APRIL 2024**

We hope you enjoyed this session.

Please be sure to **fill out your attendee evaluations** which provide us with valuable insights to improve future conferences!

Please hand them to your room monitor at the end of each day to enter the raffle prize draw.