DEVELOPING EFFECTIVE PROGRAMS IS NOT MAGIC AND IS NOT A SKILL RESERVED FOR A FEW TALENTED WRITERS.

VISUALIZING AND WRITING VIDEO PROGRAMS

BY STEVE FLOYD

If you are like most trainers, you probably would like to use video more effectively, but really aren't sure where to start. Unfortunately, most trainers don't understand how to produce a media program and most producers are not particularly interested in training design. As a result, a gap often develops between media production and training.

The problem usually begins when the front-end analysis or instructional design is completed. The trainer then makes a request for media support. These requests often ignore the front-end analysis entirely and give very little direction other than *"I need a videotape to train the engineering staff"* or *"I need some slides to orient the new clerks."* These kinds of requests are all too common and create time consuming delays, because the producer has to find out what it is the trainer really wants. The lack of clear direction creates confusion and the trainer often abdicates responsibility for the program because he or she has no idea what he or she needs or does not know how to communicate these needs to a producer.

Developing effective training programs is not magic and it is not a skill reserved for a few talented writers on either coast. In fact, creating interesting, functional and effective video programs does not necessarily take years of experience or a special knack for creativity. However, it does require hard work, discipline, curiosity, flexibility and some gumption. There are some fairly basic guidelines to help simplify the creative process of putting together a training program. These guidelines are designed to help trainers maintain control of the program and to significantly reduce preproduction development time. This process enables the trainer to interpret the direction and scope of the project so that the objectives aren't lost somewhere between the problem definition and the editing room.

For lack of a better title, I call the process the "Big 10 Steps." These steps are:

1. Audience Analysis
2. Task analysis
3. Definition of Objective
4. Conceptualization
5. Visualization
6. Storyboard
7. Video storyboard
8. Evaluation
9. Revision
10. Production

Front-end Analysis

Audience analysis, task analysis and definition of objectives are three steps already familiar to trainers and are commonly grouped together under the label front-end analysis. The front-end analysis forms the foundation for any training program. However, for some reason, successful trainers often forget to apply the same basic principles to media presentations that work so well for designing live instruction.

After completing the front-end analysis, the next step is that of conceptualization. Conceptualization can be defined as the initial organization of ideas into a general model or direction. An analogy for conceptualization is trying to give someone directions to the airport

from the center of a major city. There are usually two or three routes that a person can take. Before giving specific directions, you need to decide which route makes the most sense and would be easiest to follow. If you started giving specific directions before you decided what general route to take, you might confuse the listener with contradicting advice and by revising the route before you got it straight.

Developing a clear idea to a program concept is important for two reasons. First, it determines the types of problems you will encounter as the program evolves. Second, the closer the final program conforms to the original program concept, the happier you will be with the final product. If you see the program as a highly visualized lecture with a lot of graphs and location shots, but the producer brings back a series of dramatizations tied together with a moderator, you will probably be disappointed. This is why it is critical to clearly define the direction and scope of the project at this point.

As you review the front-end analysis, you will begin to see a certain type or style of program evolve. This is the program concept. We have divided the most common training concepts into six groups. These models are lecture, illustration, broadcast, dramatization/simulation, interactive and combination.

The *lecture model* is the most common and is the one that most traditional training instructors select. The camera is set up in a classroom or studio and the lecturer makes a "live" presentation for the camera. This can be an effective technique for content experts and for relatively short presentations, especially when the material has been tested in the classroom and the presenter is well-rehearsed. However, the dynamics of a recorded presentation are different than those for a live lecture. The transitions need to be built into the presentation. Major points need to be clearly defined and the material needs to be tightly structured. Unfortunately, these design elements are often sacrificed for expediency and thus result in poorly organized, boring programs.

The second common model is the *illustration concept.* This concept is very common in traditional skills training films and slide programs. A deep-voiced radio announcer (from the heart of the midwest) reads a script while the appropriate procedures are demonstrated. Well-visualized programs can significantly reduce presentation time to as little as 25 per cent of a live classroom lecture. The secret to the illustration approach is continuity, pacing and well-designed visuals.

The *broadcast model* is the concept that some media producers try to use for every program. They believe that every program should look like the evening news or a variety show. This requires expensive sets, a studio, professional talent and bigger budgets. This approach is just as valid as any other concept. However, it emphasizes style over content. This does not imply that programs should be dull or that poor technical quality is excusable for training. I simply want to point out that just because a program looks like the six o'clock news or features "name" talent, doesn't mean that it necessarily contributes anything to the objective. The broadcast concept can be extremely valuable, however, particularly when impact on the viewer is critical or a new twist is needed, but it should be looked at as one alternative, not as "the way." After all, how many humorous accounting textbooks or suspense-filled engineering journals have you read lately?

The *dramatic/simulation concept* is possibly the most difficult type of program to produce for several reasons. First, drama requires the resolution of a conflict. Be careful to base the conflict on the content and not on a staged event such as a kidnapping or some equally sensational event. For example, trying to resolve a supervisory problem or demonstrating what would happen if a system breaks down could be very effec-

tive applications.

Drama has two additional trouble spots that you will need to overcome to be successful. First, dramatic plots often have a number of interpretations depending on the audiences' point of view. As a result, you need to focus the viewers' attention directly on the points you want to make. The second trouble spot concerns whether or not to use professional actors. Use professional actors only if someone is not doing their normal job. Don't ask the shop foreman to play a vice-president in marketing or vice versa. The audience will immediately see through the facade. Use professional talent to add life to a stilted dialogue. On the other hand, it is not necessariy desirable to hire actors to play a role if you have someone who can demonstrate their job naturally. Hard and fast rules don't really apply so be sensitive to each situation.

The newest approach for video programs is the *interactive concept*, although it is probably one of the oldest concepts in education. This type of program requires the trainee to actively participate with the program. Exercises or questions are designed into the program so that the trainee must respond correctly before moving on to the next module. This concept is becoming popular in aviation and computer training.

The last of the six concepts is the *combination* which simply uses two or more of the other five approaches. For example, animation is a combination of dramatization and illustration. Recording the resident expert's presentation and then inserting visuals throughout the program is a combination of lecture and illustration. In fact, most programs employ some combination approach.

With the characteristics of these concepts in mind, review the front-end data or quiz the content expert until a concept begins to take shape. Don't worry about specific visuals or explanations, but concentrate on the major segments. Think about the general look of the program and the approach you want to take.

After you have selected the type of concept or approach you want to use, you can begin to visually structure the material. Visualization can be defined as simply selecting or creating visuals to structure the materials. Visualization is still an internal process. You should not try to begin writing dialogue or narrative before you can structure the entire program visually. Why? Because visuals reduce verbal explanations, they have greater impact and have greater retention than words. By delaying writing, we can avoid producing "radio" scripts with pictures.

Begin by thinking about the concept and the objective. Take the task analysis or the content outline and interview the course developer until you see the program take shape in your mind's eye. Ask yourself or the content expert what the function of each step is. If a sequence does not have a specific function, you should consider cutting it. In other words, if a visual is not highlighting, clarifying, reinforcing, or introducing the message, it may actually confuse or misdirect the viewer. When you have organized the material visually, shot-by-shot, in your mind, you can begin to structure the program on paper.

The structure of the program should follow the same guidelines they told you in Speech 101 (with a twist): Show them what you're going to show them, show them, then show them what you've shown them. The opening is obviously one of the most important elements in the program, since the introduction sets up audience expectations for the rest of the program. Use the opening to let the viewers know immediately what the direct pay-off or benefit of the program means to them in their job. Make the opening meaningful to the audience so that they have a reason to watch the program. It can be approached any number of ways, but remember to include the pay-off at the start.

Follow the introduction with a brief overview of what the major points that the program will cover and introduce any materials or

tools that are needed. Use the overview to lead into the first major point. This overview can be accomplished with a loosely structured drama, a straightforward Skinnerian style description with graphics, etc. After introducing the main point, define it and give at least one example relevant to the trainee. After completing the content for a topic, briefly summarize the critical points and use the summary as a transition to move to the next major item. Follow this same procedure of introduction, definition, example, explanation until all of the material is covered, then use a brief summary to highlight and reinforce the content. This structure is not tied to a lecture approach and can be used with any concept. It provides a framework to structure material so that creative devices have a purpose relating to the content.

Putting Together a Storyboard

With your visual structure in mind, you can begin to match the visual ideas with the content in a storyboard. A storyboard is simply a paper translation of the concept, task analysis and visualization. The format is not important. You can use 3x5 cards, paper with boxes on the left side and audio on the right, or you can simply draw a line to separate shots. The important contribution of the storyboard is that it combines the different elements of the program on paper so that the ideas can be shared.

There are two important elements in a storyboard: putting enough information in the visual and writing audio for the ear. If you are writing a storyboard that you will also produce, the amount of information you put in the visual is up to you. However, if you are writing for a producer or a large crew, the more information the better. For example, if you want a close-up shot of the profile of two middle-aged business executives talking at lunch in a cafe, then you need to sketch or write that information in the visual. On the other hand, if you want a shot of two men talking and you don't want to define it any further, fine. Just be prepared for what you get. If color is important, make notations. If

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type style, graphics, camera angles, etc. are important, then make sure you indicate it for the producer.

The other important element in a storyboard centers on the difficulty of writing audio so that it "sounds" right. Remember, the presentation will be listened to, not read. Something that reads well may sound stilted and too formal in an A/V presentation, since we talk differently than we write. Sentences are shorter and meanings can be changed dramatically by voice inflections. Try to avoid these pitfalls by using shorter phrases and have someone read the material out loud so that you can hear how it is going to sound.

With these ideas in mind, make a quick, rough draft storyboard. After you complete the first draft, examine the structure. Does it make sense? Are the procedures clear? Are relationships apparent? Do the transitions work? Is there enough review? Rewrite the material with these points in mind and try to refine the transitions. At this point, you will be tempted to say enough, roll tape. However, don't jump prematurely. I've found that generally a third rewrite clarifies the material and improves the concept. A fourth rewrite is probably unnecessary except for minor content changes or unless the client rejects the program entirely.

Ready for Production?

Now you're ready to go to production, right? Well, sort of. The production that follows should be a quick and dirty prototype of the final program, the video storyboard. It simply tests the content, pacing and the creative concept. The trouble with scripts and paper storyboards is that very few people really see the visuals or hear the audio when it is written down. It takes practice to see a program evolve from a piece of paper. Most content experts fail to carefully check the content because they focus instead on grammar or phrasing. Generally, this is not the kind of input that you need from content people.

A video storyboard provides an alternative. Simply shoot rough magic marker art or polaroid pictures for the video and read the script into microphone. This can be done with basic equipment and an easel. The same effect can be achieved by using slides and an audio cassette. The objective is to test the content and see if the programs work.

Now show the program to an audience of typical trainees and an audience of content experts. Document their reactions to see where the program needs more clarification or where content changes are necessary. This step helps you validate the material before it goes to production. It also increases the commitment of everyone involved and syndicates your risk.

Instead of adding to the turnaround time, the video storyboard and evaluation steps actually cut total costs and reduce turnaround time by making the approval process easier and by virtually eliminating postproduction changes which are extremely costly. One organization adopting those procedures was able to reduce preproduction time by 50 per cent.

Now revise the program and clean up the rough spots. At this point, you are ready to plan a shot sheet or to turn the project over to a producer who can then take your work and put together the type of program you want. The important point is to maintain control of the content and don't abdicate your responsibility for the program. By following these steps, and visually structuring the program, you can turn out effective, interesting programs in a short period of time without Hollywood-size budgets. The trick is to structure the material with the objectives and the audience in mind. Don't get hung-up on specifics until you've determined general concepts. Let the media producer worry about the zooms and edits. You simply need to concentrate on what needs to be emphasized in the content.

The difference between an effective program and one that fails to achieve its objectives is usually lack of organization and revision. If you are not willing to put a lot of work into the program, don't expect the program to suddenly appear exactly as you originally conceived it. Try these steps and "play" with the material to see what works. You may surprise yourself, especially if you take some risks. After all, you are as creative as you allow yourself.

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