



THE VIDEO STRATEGY

BLUEPRINT

v3



The Objective

This blueprint is built for startups and agencies that need to scale their video presence without the overhead of an internal production department. We focus on **Infrastructure and Intelligence** - the systems required to extract **client intelligence** and deploy it effectively across your entire sales funnel.

If you are looking for a way to turn customer stories into high-value sales assets without the "production drag" of traditional video, this guide is your map.



THE BASICS

(What you need to consider before you dig in)

Who and What?

The 2026 Shift: Infrastructure over Effort The original version of this blueprint was built for the "Creator Era" - a time when the bottleneck was learning how to be on camera and manage gear. In 2026, the bottleneck has shifted. Startups and agencies don't have the time to become production houses; they need **Infrastructure**.

This blueprint now focuses on **Path B: The Infrastructure Model**. Instead of building personal skills, you are building a standardized capture layer. We move away from "making content" and toward **Sales Intelligence** - extracting the specific customer evidence that moves the needle on your bottom line.

To whom Are You Speaking?

Figure Out Your Target Audience

It may seem obvious in other forms of communication. You should know whom you are talking to before you speak. In the same way, you have to know your target audience before you can think about planning out your video strategy.

One of the more common mistakes that people make on this front is that their 'target' is too broad of an audience. Using words like 'everyone' as part of your target audience description just isn't going to cut it. In fact, I would go so far as to say if you are using the words 'everyone', 'anyone,' or 'all' in your target market description, it is time to start over.

You need to get specific when determining your audience and not superficially so; dig deep and find the common denominators that make your target audience who they are.

If you just want to go for it, here are some audience-related questions to help you define your target market:

- *What does my ideal customer look like (in terms of demographics)?*
- *What makes them make decisions?*
- *What are some of their interests?*
- *Do they have other brands/companies they follow?*
- *Where would they generally encounter a message online (social media, streaming services, blogs, etc.)?*

Here's an example. Let's say you're a B2B company that offers cybersecurity solutions to protect other businesses from digital threats. You generally sell to small/medium-sized businesses. The thing that makes your services unique is that you're more cost-effective than the competition and everything can be conveniently monitored through a smartphone app. You engage with people within organizations who have buying authority.

The description of your target market may look like this:

- *Male, ages 35-55, white collar job (business owner, IT manager/director)*
- *Make purchases for their business that will yield a high ROI while being efficient*
- *Interested in business development/growth. Stays up-to-date on the latest technology trends*
- *Interested in Microsoft, Google, IBM & Cisco*
- *Spends time during the day checking LinkedIn and reading blog posts on Forbes, Fast Company, and Business Insider*

By knowing precisely what your target audience looks like, you'll be able to get a message across to them effectively. The way to package a message for a group of 18-24-year-olds is going to be different from that for 35-55-year-olds.

Think of the target market for your video strategy with that level of specificity (or better), and everything becomes easier. Messaging, style and video type become clear. How, when, and where to distribute your content becomes easier too.



Extraordinary Client Exercise

Undoubtedly, the profile laid out on the previous pages can be hard to pin down. And even if you manage to do it, there is some inherent waste in that strategy. You can only define so many characteristics in your outreach, and not everyone in your target demographic is going to "fit." It's a bit of a numbers game, increasing your odds of success.

You can do better. I recommend that you use your current client list to drill down even further and get super specific with your campaign.

Let's look at your Extraordinary Clients.

The beauty of this exercise is that it can help you clearly see which clients and customers are best for your business, and then you can explore the connections between them to build laser-focused campaigns and strategies designed to get you more of these business-changing clients.

Use the worksheet on page 09 to complete this exercise.

List Your Clients

Down the left side of your paper, make a list of seven to ten current or recent clients. Don't give any thought to who is best or worst. Whatever names pop up first - write them down.

Rate them on Fit (0-3)

The next step is to rate each client on 'Fit' in a column to the right of your client list.

For each client, decide on a rating between 0 and 3 on the quality of this client relating to your time.

As in, how well did this client align with your process, expectations, and working style? Think simple: did this feel smooth, or did it feel heavy? Good fits usually communicate clearly and follow your lead. Low-fit clients often take more energy than they give.

Rate them on Value (0-3)

Next, rate each client on 'Money' in a column to the right of your 'Fit' ratings.

For each client, decide on a rating between 0 and 3 on the quality of this client relating to value.

This isn't just financial - value can be referrals, visibility, intros, repeat work, or momentum.

Rate them on Impact (0-3)

I think you get the gist. How does this client rate on 'Impact'?

For each client, decide on a rating between 0 and 3 in terms of impact.

Did they see clear results you helped create? Or did they shape something in your process - something that improved how you work?

The Math - Totals

Multiply the three ratings for each client to get a total. The higher score, the more ideal this client is for your business.

If you have a client with a score of 27 (all 3s), you have found a truly ideal client. Circle them on your paper. Use them (or as close to 27 as you can) in your analysis. Find more of them.

In the converse, a client with a 0 in any category is a bad client. A grinder, and you don't need any more of those. Cross them off.

The Aftermath

Now that you have identified who your ideal client(s), you can develop your ideal market. What commonalities do they have? Don't be afraid to dig deep. Write it down.

To finish off the exercise, consider the best way to reach this market. What common problems do they have? What makes them buy or take action?

Extraordinary Client Worksheet

Who is your target market? Write it down:

Your Top Clients Time x Value x Project = Total

Your Top Clients	Time	x	Value	x	Project	=	Total

What are some similarities between the top rated?

How can you engage your Extraordinary Clients? Write it down:

How can you reach people like this?

What common problems do they have?

What makes them buy or take action?

What Do You Want Them To Do?

Figure Out Your Desired Result

This is another one that may seem obvious, but clarity in your desired goal is a must.

If you are ready to brush this off and say 'more sales.' Don't. How you get to that result, a defined number of sales, and what product you are selling all factor into a successful strategy.

The key here, again, is to be specific. Needless to say, not all results are created equal. A sale goes directly on your balance sheet, while a social media follower may or may not ever move the needle.

Another point to note is that the closer to revenue that your goal resides, the more complex and complete your strategy must be. For example, it is easier to build a campaign that generates views or followers than one that generates sales.

Here are some common results to consider:

- *Number of sales*
- *Specific products sold*
- *Number of followers gained on X network*
- *Number of appointments booked*
- *Shares of specific content*
- *Downloads of a content piece*

Whatever result you land on, be prepared to work backward from that point to where your target market resides today.

On to the customer journey.





THE JOURNEY

(A PATH TO SUCCESS)

Now that we know the 'Who' we are talking to and 'What' we want them to do, it's time to discuss how to get them to do it.

This can often be summed up in a 'Customer Journey,' a 'Hero's Journey' or a 'Sales Funnel.' The basic point is, the people in my ideal market are at A. How do I drive them to my desired result (B)? When considering a video campaign, the sales funnel is a good place to start.

This is probably a good time to note - a sales funnel does not need to end in a sale. It seems weird, but this concept can apply to generating followers on social media, generating views on your video content, or nearly anything else. The point is that you are facilitating the journey to a specific result - sales or otherwise.

With that in mind, for the purposes of this guide, we will refer to 'sales funnels' from here on out as simply 'funnels'.

What is a Funnel?

There's a good chance that your business has several funnels established (even if you're not aware of them); sales, customer service, marketing, etc.

A primary funnel can be broken up into three to four stages (depending on whom you ask). For simplicity, we will stick with three. They are:

- Awareness
- Consideration
- Decision



Awareness Stage

In the **awareness stage**, your ideal market may not even be aware that they have a problem (or of your company). If they are, they are just beginning to search for solutions that can best solve it. Here is where your ideal market becomes aware that your business or that a specific aspect of it exists.

During the awareness stage, you should have top-level/general content for people to find and consume easily. This is often less targeted, meaning that the information they find doesn't need to be super specific. It should lead to more specific content or answers and facilitate your ideal market's journey down the funnel.

Videos that work well here are overview videos, walk-through videos, event videos, and introduction videos. These videos tend to be shorter, as they are often just a primer.

Consideration Stage

Next is the **consideration stage**. During this stage, potential customers are searching for answers to the specific problems they are facing. These people want to know exactly how your product/service can help them. This is a great stage in which to build brand authority. You should be offering solutions.

During the consideration stage, you should have content that is focused on a single subject, rather than being too general or longer-form content that dives deep. Your content should be informative and solve problems for your ideal market or explain how your product/service is a great solution.

Videos that work great during the consideration stage are video podcasts, educational videos, features/benefits videos, testimonial videos, and how-to videos. These videos can be longer. Your audience is interested and wants to learn more.

Decision Stage

The final stage is the **decision stage**. This is when you can close a sale or encourage action. It is where you accomplish your 'What'. Someone is about to make a decision. You need to show them exactly why you have the best solution, you need to catch them at the right time, and they need to believe enough that you have the right solution to their problem that they take action.

Content that works excellent here is action-oriented. Ask for the action you desire, whether it is a sale, a phone call, a website visit, or email signup.

Effective videos for this stage are sales, lead magnet, or product/service example videos. You'll want to use a strong call-to-action to get results.

Wait, Wait - I Need Three Video Types?

It looks that way - Right? But, no, you do not.

While looking at the three distinct layers of a funnel is easiest to break them out into separate video types; you may have videos that can fill multiple rolls or not use video for every level of the funnel. The suggested video types that we list are just that - suggestions. You can create overview videos that act as decision stage videos and generate your desired results; in the same way, you can create a product video that does not. It comes down to your ideal market, what action you are asking them to take and how to put those pieces together.

Another consideration is that you may not need to create content or even have a plan for all three levels of the funnel. If you are creating videos to send to your engaged and enthusiastic email list, you may be able to skip the awareness and even the consideration stage and still get your desired result.

All of this being said:

You Must Have Something in Place for the Decision Level of the Funnel.

If your audience doesn't know how to proceed to your 'What,' they likely will not.

Funnel: The Strategic Execution

In the Infrastructure Model, we don't just create "content" - we extract **Client Intelligence**. A 20-minute **rootThread interview** provides the evidence required for every stage of this journey.

AWARENESS

Your potential customer learns about your business and the specific problems you solve.

- **Intelligence Goal:** Prove the problem is real and solvable .
- **rootThread Asset:** Industry Insight Clips. Use your subject's voice to define the "old way" vs. the "new way".
- **Distribution:** LinkedIn outreach, brand awareness ads, and top-of-funnel social posts.

CONSIDERATION

At this stage, your potential customer is searching for answers. How do you solve their problem?

- **Intelligence Goal:** Neutralize "technical anxiety" and build brand authority.
- **rootThread Asset:** The Process Story. Direct evidence from a peer proving your solution is "seamless" and "accessible."
- **Distribution:** Email sequences, deep-dive blog posts, and retargeting campaigns.

DECISION

The final step. This is when you can close a sale or encourage direct action.

- **Intelligence Goal:** Close the gap between "Interested" and "Sold" with undeniable proof .
- **rootThread Asset:** Objection-Killers. Hard ROI data and "Hero-Maker" quotes that give your champion the evidence they need to get the deal signed by leadership .
- **Distribution:** Sales decks, landing pages, and one-to-one proposal follow-ups.

BEST PRACTICES

- **Standardize the Capture:** Use the **vidKit v3.1** to ensure professional 4K quality regardless of the subject's location or technical skill .
- **Extract, Don't Script:** Use the **Messaging Deployment Grid** to find the "Messaging Gold" your copywriters need.
- **Be the Hero:** Deliver **Client Intelligence** that makes your agency or department indispensable to senior leadership



THE PLAN

(GREAT THINGS HAPPEN WHEN ONE COMES TOGETHER)



It is time to make your plan. At the end of this section, there is a worksheet for you to use if you would like, but the basic premise is this - start by considering your ideal market, your 'What' and work your way backward utilizing your funnel to where your ideal market is today. What path can you create to help move them down your funnel? Do the pieces fit together? Is the next step obvious?

We will look at:

- Goal setting that will drive your campaign
- The messaging that will interest your ideal market
- The realities of video content creation
- The schedule that will make sure it all gets done

That worksheet at the end of this section is where it all comes together - ideal market, your 'What,' your journey, goals, video types, messaging, and a content schedule - your full video strategy on a nice neat one-pager (you may need the back to fill out the details).



Set Some Goals

In this model, we don't set goals around activity or 'staying consistent.' We set goals around Client Intelligence Outcomes. Your objective is to move leads through the funnels.

As I mentioned earlier, having goals such as “increasing sales” or “generating more profit” are fine, but they are extremely general. In fact, you could say those are the goals of every business.

When it comes to setting your goals for your video strategy, you want to make sure that your goals are S.M.A.R.T. goals. S.M.A.R.T. is a handy acronym that stands for:

- *Specific - the goal is clearly stated and understood*
- *Measurable - the goal and progress towards your goal can be measured in some way*
- *Achievable - the goal is possible and realistic*
- *Relevant - the goal aligns with your overall business strategies*
- *Timely - the goal is set to a specific time frame*

S.M.A.R.T. goals are at the base of pretty much all successful campaigns out there - sales, marketing, education, and the like.

The Intelligence Goal

- **Specific:** Extract three "Objection-Killer" clips to address pricing friction in the sales deck.
- **Measurable:** Use one 20-minute rootThread session to produce the assets.
- **Achievable:** Standardized 4K capture ensures a successful session on the first try.
- **Relevant:** Directly supports the sales team's ability to close high-value accounts.
- **Timely:** Implemented and live in the deck within 30 days.

What are one or two smart goals you can define for your video strategy?



Determine Your Message

After you've identified your target audience and know your goals, you can figure out precisely what you're going to say. Everybody has a unique story to tell.

Your message bears a lot of responsibility for whether or not your video strategy is going to be effective. There's no limit on people or companies that you can reach with video. However, attention spans are finite, so if you can't grab and hold someone's attention, your videos just won't be successful.

To figure out how effective your message has a chance of being, answer these questions:

- **Is it unique?** If you aren't presenting new information, or at least common information in a different way, then what is going to make someone stop to watch your video? What makes them stay and watch the whole thing? There is most likely going to be an overlap in regard to video topics, so you need to use what makes you unique to stand out.
- **Does it solve a problem?** Being different just for the sake of being different doesn't do much unless your message also promises to help someone or solve a problem. Even if the problem is simply that your audience is bored or looking for something to learn, engage with, or be entertained by. Make sure your message is relevant to your intended audience and carries some real value.
- **Does it promote your business?** Be careful here. While one of the goals of your strategy may be to promote your business, you need to be careful not to be too salesy. People don't like jumping into a sales pitch head first, so be subtle about how you point back to your business. But make sure to do it. Otherwise, what's the point?

Do you want to dig deeper? Check out the Ideal Message Worksheet on the next page.

Ideal Message Worksheet

Do you want to put your message ideas to the test? Rate them like you did your target market with this worksheet.

What is your primary message? Write it down:

Messaging Ideas Unique x Problem x Promo = Total

Messaging Ideas	Unique	x	Problem	x	Promo	=	Total

What are some similarities between the top rated?

Who is your *revised* message? Write it down:

How can you best utilize this message?

The Deployment Candence

For a founder or agency leader, a 'schedule' is not a content treadmill; it is a Messaging Deployment Cycle. Because the Infrastructure Model batches your extraction, your schedule shifts from daily production to periodic deployment.

- The Quarterly Extraction: Schedule one 20-minute rootThread session every 90 days with a high-value client to refresh your evidence library.
- The Monthly Deployment: Spend 30 minutes once a month dropping your new 'Industry Insight Clips' and 'Process Stories' into your existing outreach and email sequences.
- The ROI of Efficiency: By focusing on Extraction rather than Creation, you spend 90% less time on production while increasing the strategic weight of every asset you share.

Video Strategy One Page

Who is your ideal market?

What do you want them to do?

Describe their journey down your funnel?

Awareness: _____

Consideration: _____

Decision: _____

What is the primary SMART goal?

What will your messaging be centered around?

What types of video will you produce?

Layout your schedule

Conclusion: Move to Execution

AA strategy is only as valuable as the results it produces. Most video plans fail because of "production drag" - the technical hurdles, administrative time, and inconsistent quality that stall momentum before you ever see a return.

Your goal is to scale your client intelligence, not your production workload.

By deploying a standardized infrastructure, you remove the friction of "making video" and focus entirely on the **rootThread** - the high-value customer evidence that actually closes deals. You don't need to be a production expert; you need a partner that handles the capture and analysis so you can focus on the strategy.

Stop planning and start extracting.

Next Steps:

- **Standardize:** Move away from the variable costs and low quality of webcams or travel crews. Professional 4K capture should be a utility, not a project.
- **Extract:** Use the **rootThread** method to find the "Objection Killers" in your customer stories.
- **Deploy:** Turn that intelligence into a **Messaging Deployment Grid** that feeds your entire sales and marketing funnel.

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