

Asset Audit & Goal Setting Checklist

Fifteen minutes with this before our call, and we skip straight to the useful part.

You don't need answers to everything. Blanks are useful too — they tell me where to dig. Bring whatever you've filled in to the call, or email it ahead.

01 WHAT ARE YOU RAISING FOR?

The campaign, appeal, or event this video supports

When does it need to be in front of people?

Who's the ask aimed at? (major donors, small gifts, a foundation, your board)

What should someone do in the ten seconds after watching?

02 WHAT YOU ALREADY HAVE

Tick anything that exists, even if you think it is unusable. That judgement is my job.

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|--|--|
| ☐ Event or gala footage | ☐ Logo files and brand guidelines |
| ☐ Program or site-visit footage | ☐ Photos from a hired photographer |
| ☐ Interviews already recorded | ☐ Staff or volunteer phone photos |
| ☐ Videos made in past years | ☐ Written testimonials or quotes |
| ☐ Drone or exterior footage | ☐ Annual report design files |
| ☐ Headshots of staff or board | ☐ Social posts that performed well |
| ☐ Impact data or outcome numbers | ☐ Charts or infographics already designed |
| ☐ A website or tool worth showing off | ☐ Illustrations or icon sets |

Anything else?

03 WHERE DOES IT ALL LIVE?

This is the question that surprises people. Footage is usually scattered across four or five places.

- ☐ Shared drive or Dropbox
- ☐ Someone's laptop or phone
- ☐ A photographer or agency still holds it
- ☐ An old hard drive nobody has opened
- ☐ Honestly, no idea

Who would know? (name or role)

Has anyone ever catalogued or organised it?

04 PERMISSIONS

The thing that most often stalls a project late. Worth checking early.

- ☐ We have signed releases for people who appear on camera
- ☐ Some releases exist, some do not
- ☐ No releases — we would need to sort this out
- ☐ Not sure

05 THE PRACTICAL BITS

Is this funded by a grant? If so, which one, and does it carry reporting requirements?

Rough budget range you are working within

Who signs off on the final piece?

What has worked — or badly not worked — with video for you before?



That's the audit. Let's talk through it.

Fifteen minutes, no pitch deck. You do not need to have everything figured out.

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