

# BEFORE YOU FILM

## Documentary Pre-Production Checklist

A practical guide to help you prepare before the cameras start rolling.

Part of the **Story Forward**<sup>™</sup> Resource Library



# BEFORE THE CAMERAS ROLL

## Preparation Gives Your Story Room to Grow

Good documentaries often feel spontaneous on screen.

Behind the scenes, thoughtful preparation can make the difference between capturing the story you hoped for and discovering too late that something important was missed.

This checklist is designed to help you think through the creative, practical, and logistical details that deserve attention before filming begins.

You do not need to have every answer.

You simply want to know which questions still need an answer.

### Where This Resource Fits

The Before You Film: Documentary Pre-Production Checklist is part of the LEARN stage of the **Story Forward<sup>™</sup> Framework**.

It is designed to help you build the knowledge and clarity you need before moving deeper into planning and production.



## THE STORY FORWARD<sup>™</sup> FRAMEWORK

Every documentary begins with a story. Every successful documentary begins with a plan.

The Story Forward<sup>™</sup> Framework is our proven approach to helping storytellers move confidently from idea to impact. Whether you're just getting started or preparing for production, each stage builds on the one before it.



**YOU ARE HERE**  
**LEARN PHASE**

Before You Film lives in the Documentary Resource Library.



Learn at your pace.  
Connect when you're ready.  
We're here to help you move  
your story forward.



Today's goal is simple:  
**Help you make better  
documentary decisions  
before production begins.**



# START WITH THE STORY

## 1. Story & Purpose

Before thinking about cameras, locations, or schedules, make sure the story itself has a clear foundation.

- ☐ We can explain the central story in a few clear sentences.
- ☐ We understand why this story matters.
- ☐ We know who or what is at the heart of the story.
- ☐ We have identified the primary themes we hope to explore.
- ☐ We understand what makes this story distinctive.
- ☐ We know what questions we want the documentary to investigate.
- ☐ We have considered how the story might evolve during production.
- ☐ We are prepared to follow unexpected story developments when appropriate.

### A HELPFUL QUESTION

If someone asked, "Why should this documentary exist?" could you answer clearly?

## KNOW WHO THE STORY IS FOR

## 2. Audience & Impact

Knowing who you hope to reach can influence everything from interview choices to distribution strategy.

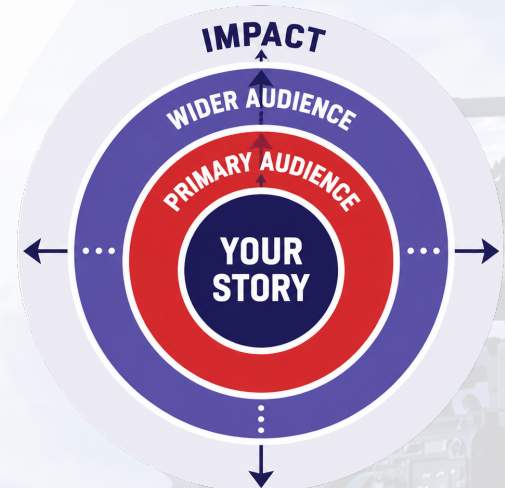
- ☐ We have identified the primary audience for the documentary.
- ☐ We understand why this audience may care about the story.



- ☐ We have considered secondary audiences.
- ☐ We know what we hope viewers will feel, understand, or consider.
- ☐ We have discussed whether the film is intended primarily to inform, inspire, entertain, advocate, preserve history, or create conversation.
- ☐ We have considered what we would like viewers to do after seeing the film, if anything.

### A HELPFUL QUESTION

If someone asked, "Why should this documentary exist?" could you answer clearly?



A clear audience helps create a clearer path forward.

# PEOPLE & INTERVIEWS

## 3. Participants & Interviews

*The people who appear in a documentary often become its emotional heartbeat.*

- ☐ We have identified the primary people we hope to interview.
- ☐ We have identified additional voices that could add context or perspective.
- ☐ We have spoken with key participants about the project.
- ☐ Participants understand how their interviews may be used.
- ☐ We have considered whether any participants may require special care or sensitivity.
- ☐ We have researched each primary interview subject.
- ☐ We have developed interview topics or preliminary questions.
- ☐ We know which interviews are essential and which are optional.
- ☐ We have considered who may be missing from the story.



### THINK BEYOND THE EXPERT

Sometimes the most memorable interview is not the person with the biggest title. It is the person with the most meaningful connection to the story.



# LOCATIONS & VISUAL STORYTELLING

## 4. Locations and Visual Opportunities

*Documentaries are visual stories. Interviews alone rarely tell the whole story*

- ☐ We have identified primary filming locations.
- ☐ We have confirmed whether permission is required at each location.
- ☐ We understand any location restrictions.
- ☐ We have considered lighting, sound, accessibility, and available space.
- ☐ We have identified meaningful environments connected to the story.
- ☐ We have considered opportunities for observational or candid filming.
- ☐ We have identified important activities, events, or moments we hope to capture.
- ☐ We have backup options if a planned location becomes unavailable.



★ Together, they help create the visual language of your documentary. ★

### ASK YOURSELF

What could we show the audience instead of simply telling them?

# ARCHIVAL MATERIALS

## 5. Photos, Video & Historical Materials

*Existing materials can add context, credibility, emotion, and history to a documentary.*

- ☐ We have identified photographs that may help tell the story.
- ☐ We have identified existing video footage.
- ☐ We have considered newspaper articles, letters, documents, recordings, or other historical materials.
- ☐ We know who owns or controls the materials we hope to use.
- ☐ We have begun discussing permission or licensing where appropriate.
- ☐ We understand that finding an image online does not automatically mean we have permission to use it.
- ☐ Important materials are being organized and backed up.

### HELPFUL TIP

Create an Archival Wish List early. Do not wait until editing begins to discover that an important item cannot be located or licensed.

## RIGHTS, RELEASES, & PERMISSIONS

*Documentary production involves more than storytelling. It also involves the right to use what you film.*

## 6. Legal & Permissions

- ☐ We have appropriate appearance or participant release forms available.
- ☐ We understand when location releases may be needed.
- ☐ We have considered permissions for privately owned locations.
- ☐ We are tracking archival licensing and usage permissions.



- ☐ We have considered music licensing needs.
- ☐ We understand that logos, artwork, photographs, music, video clips, and other copyrighted materials may require review.
- ☐ We have identified any potentially sensitive legal or privacy issues.
- ☐ We know when professional legal guidance may be appropriate.

**Educational note:**

This checklist is educational and is not a substitute for legal advice.

# PRODUCTION LOGISTICS

## 7. Schedule, Crew, and Equipment

*Even a powerful story can be difficult to capture without solid production planning.*

- ☐ We have created a preliminary production schedule.
- ☐ Key participants have confirmed availability.
- ☐ Filming locations have been coordinated.
- ☐ Travel requirements have been identified.
- ☐ Crew needs have been determined.
- ☐ Camera, audio, and lighting requirements have been considered.
- ☐ Appropriate backup equipment has been planned.
- ☐ Batteries, media, storage, and power needs have been considered.
- ☐ Weather or other potential disruptions have been considered.
- ☐ We have contingency plans for important filming days.

**PRODUCTION REALITY**

**Plan carefully. Stay ready to adapt.**



**BEFORE**  
USING IT, ASK:



Did we  
create it?



Do we  
own it?



Do we have  
permission  
to use it?



## PEOPLE



The right team  
and the right voices.

## PLACE



The right location  
to tell the story.

## EQUIPMENT



The right tools  
to capture it well.

## TIME



The right timing  
to make it happen.



KINDNESS FACTOR  
PRODUCTIONS

STORY FORWARD

# BUDGET & RESOURCES

## 8. Match the Plan to the Resources

*Your production plan and your available resources need to support one another.*

- ☐ We have developed a preliminary production budget.
- ☐ We understand the major cost categories.
- ☐ Travel expenses have been considered.
- ☐ Crew costs have been considered.
- ☐ Equipment costs have been considered.
- ☐ Insurance needs have been considered.
- ☐ Archival and licensing costs have been considered.
- ☐ Post-production costs have been considered.
- ☐ Contingency funds have been considered.
- ☐ We understand what funding is currently available.
- ☐ We know which portions of production may depend on future funding.



**KEEP IN MIND**

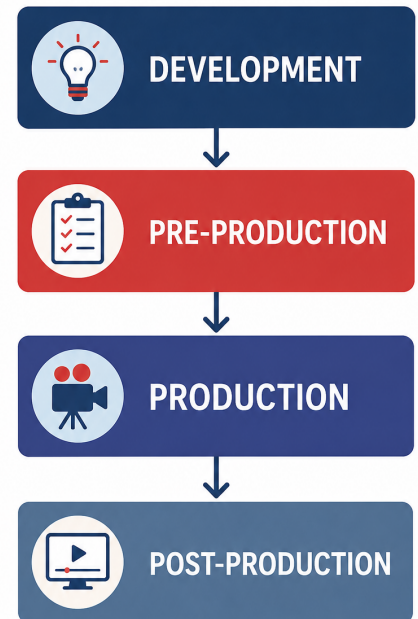
You may not need every dollar on day one.  
Documentary production often happens in phases.  
Funding can, too.

# PEOPLE FIRST

## 9. Safety & Care

**The responsibility of documentary filmmakers extends beyond getting the shot.**

- ☐ We have considered the physical safety of participants and crew.
- ☐ We have considered whether any subject matter may be emotionally difficult for participants.
- ☐ We understand any special accessibility needs.
- ☐ We have planned appropriate breaks and realistic filming schedules.
- ☐ Participants know whom to contact with questions or concerns.
- ☐ We have discussed how sensitive situations should be handled.
- ☐ Our production approach respects the dignity of the people whose stories we are telling.



  
*Resources can be secured as the project moves forward.*



**ONE PRINCIPLE  
WORTH REMEMBERING**  
**THE STORY MATTERS.  
THE PEOPLE IN THE  
STORY MATTER MORE.**

# FINAL PRE-PRODUCTION CHECK

## Before the First Camera Rolls

*Before your first major filming day, confirm the essentials are in place.*

- ☐ Story direction is clear.
- ☐ Primary participants are confirmed.
- ☐ Locations are confirmed.
- ☐ Schedule is distributed.
- ☐ Crew is confirmed.
- ☐ Equipment is ready.
- ☐ Releases and permissions are prepared.
- ☐ Travel arrangements are complete.
- ☐ Interview preparation is complete.
- ☐ Archival priorities have been identified.
- ☐ Data storage and backup plans are ready.
- ☐ Emergency and contingency plans are understood.
- ☐ Everyone knows where they need to be and when.





# LEAVE ROOM FOR THE STORY

## You are Preparing, Not Predicting

*Before your first major filming day, confirm the essentials are in place.*

Preparation is essential. But documentaries have a way of revealing things you could never have planned.

A conversation takes an unexpected turn. A new person enters the story. An ordinary moment suddenly becomes the moment that defines the film.

Good pre-production does not eliminate those surprises. It gives you the freedom to recognize them when they happen.

**You can prepare**  
**the path** without  
knowing exactly where  
the story will lead.





# FROM STORY TO IMPACT

The **Story Forward™** Framework helps you decide how to move your project forward with clarity and confidence.



## THE STORY FORWARD™ FRAMEWORK

Every documentary begins with a story. Every successful documentary begins with a plan.

The Story Forward™ Framework is our proven approach to helping storytellers move confidently from idea to impact. Whether you're just getting started or preparing for production, each stage builds on the one before it.



This checklist helps you understand what needs to happen before and around production.



# TWO DIFFERENT VIEWS, ONE GOAL



# KEEP MOVING YOUR STORY FORWARD

The **Before You Film: Documentary Pre-Production Checklist** is part of the **Story Forward<sup>™</sup> Resource Library**, available within the LEARN stage of the **Story Forward<sup>™</sup> Framework**.

Use it to identify what is ready, what still needs attention, and what questions should be answered before production begins.

And remember:

You do not need to know exactly where the story will lead.

You simply want to be prepared when it takes you there.



## LET'S BRING YOUR STORY TO LIFE.

Request your Discovery Call and take the next step toward creating a **documentary that inspires**.

 Crafting inspiring stories that connect us. With Kindness, Everybody Wins.



From initial concept development through production and final delivery, we guide you through the process of creating a documentary that connects, inspires, and makes a lasting impact.

Because every meaningful story deserves to be told.

Have a story work exploring? **Reach out to request a 30 minute complimentary discovery call.**



[thekindnessfactor.com/discovery-request](https://thekindnessfactor.com/discovery-request)

[www.thekindnessfactor.com](https://www.thekindnessfactor.com)

From initial concept development through production and final delivery, we guide you through the process of creating a documentary that connects, inspires, and makes a lasting impact.

Because every meaningful story deserves to be told.

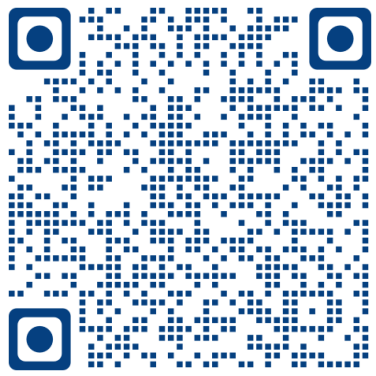
Have a story work exploring? **Reach out to request a 30 minute complimentary discovery call.**



## LET'S BRING YOUR STORY TO LIFE.

Request your Discovery Call and take the next step toward creating a **documentary that inspires.**

 Crafting inspiring stories that connect us. **With Kindness, Everybody Wins.**



[thekindnessfactor.com/discovery-request](https://thekindnessfactor.com/discovery-request)

[www.thekindnessfactor.com](https://www.thekindnessfactor.com)

### Educational Use Only

This resource is provided for general educational and informational purposes only. It is not intended as legal, financial, accounting, tax, or other professional advice. Examples and recommendations are illustrative and may not apply to every production.