

Budget and Scope Worksheet

A companion resource for The Enterprise Video Production Playbook by William Cook

Purpose: Show which production choices create cost and what changes when scope moves.

Use when: Building an estimate, normalizing proposals or testing a reduction.

Owner: The project and budget owners, completed with the production lead.

Not for: A fixed package, market benchmark, quote or substitute for the final SOW.

Project definition

Primary objective: []

Primary audience: []

Working budget range: []

Launch date and reason: []

Project owner: []

Scope drivers

Creative development

- Brief status: [approved / draft / open]
- Concepts or directions required: []
- Script, treatment, storyboard, interview or shot-list needs: []
- Creative approver: []

Production

- Shoot days: []
- Working hours: []
- Locations and company moves: []
- Participants / talent: []
- Crew responsibilities: []
- Camera, lighting, sound and specialty equipment: []
- Art, wardrobe, hair/makeup, props or vehicles: []
- Travel, parking, access and permit needs: []

- High-consequence contingency: []

Post-production

- Editorial approach and estimated source material: []
- Graphics / animation / VFX: []
- Color / sound / music: []
- Captions / transcript / audio description: []
- Language versions: []
- Review group and included rounds: []

Deliverables

Deliverable	Required / optional	Runtime	Ratio / spec	Rights / channel	Due
[]	[]	[]	[]	[]	[]

Cost comparison

Scope element	Base	Option A	Option B	Notes / consequence
Creative development	[]	[]	[]	[]
Pre-production	[]	[]	[]	[]
Crew	[]	[]	[]	[]
Equipment	[]	[]	[]	[]
Locations / permits	[]	[]	[]	[]
Talent / art / wardrobe	[]	[]	[]	[]
Travel / logistics	[]	[]	[]	[]
Post-production	[]	[]	[]	[]
Versions / localization	[]	[]	[]	[]
Rights / licensed material	[]	[]	[]	[]
Contingency / other	[]	[]	[]	[]
Total	[]	[]	[]	

Trade-off test

For each proposed reduction, answer:

- What cost or time does it remove?
- Which objective, quality, risk or deliverable changes?

- Can the production still perform its primary job?
- Who accepts the trade-off?

Assumptions and exclusions

Item	Assumption / exclusion	Owner to confirm	Decision date	Cost or schedule effect
[]	[]	[]	[]	[]

Approval

Approved option: []

Budget owner: []

Scope owner: []

Material open item: []

Date: []

From *The Enterprise Video Production Playbook* by William Cook. Published by Luma Creative. Adapt this working document to your organization's requirements.

Use this worksheet with the book's chapter guidance and the requirements of your organization. It is not legal, tax, insurance or procurement advice.

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