

Enterprise Procurement Checklist

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

Purpose: Put commercial, risk, rights and access dependencies on the production path.

Use when: Supplier onboarding begins and again before resources or locations are committed.

Owner: The client procurement or project owner, with the production lead maintaining the working status.

Not for: Replacing the client's current legal, tax, insurance, security or procurement requirements.

This is a working project checklist, not legal, tax, insurance or procurement advice. Apply the client's current requirements and signed agreements.

Business and scope

- ■ Business unit and budget owner named.
- ■ Primary objective, audience and distribution documented.
- ■ Every required deliverable counted.
- ■ Target dates and immovable milestones recorded.
- ■ Client and vendor responsibilities visible.
- ■ Assumptions and exclusions reviewed.
- ■ Change-control owner and process confirmed.

Commercial authorization

- ■ Supplier exists under the correct legal entity.
- ■ Supplier portal registration complete.
- ■ MSA status confirmed, if applicable.
- ■ SOW aligns with the approved brief.
- ■ NDA status confirmed before confidential discovery.
- ■ Purchase order or other work authorization issued.
- ■ Payment and invoicing requirements confirmed.
- ■ Correct tax form submitted through the approved channel.
- ■ Expenses and advance commitments authorized.

Insurance and risk

- ■ Required policy types and limits supplied by client or location.
- ■ Certificate holder wording confirmed.
- ■ Additional-insured requirements confirmed.
- ■ Endorsements supplied where required.
- ■ Automobile coverage reviewed if vehicles are involved.
- ■ Workers' compensation requirement reviewed.
- ■ Drone or specialty-operation coverage reviewed.
- ■ Venue or property owner has accepted the documents.

Security, data and access

- ■ Visitor and crew registration complete.
- ■ Escort and access owner assigned.
- ■ Equipment screening and loading path confirmed.
- ■ Restricted rooms, screens, products and people identified.
- ■ Network and device rules documented.
- ■ Footage storage and transfer method approved.
- ■ Sensitive-footage reviewers assigned.
- ■ Return or deletion requirements documented.
- ■ Portfolio and behind-the-scenes use decided.

Locations and permits

- ■ Exact production footprint mapped.
- ■ Property owner or public authority confirmed.
- ■ Location agreement approved.
- ■ Permit application submitted to the correct authority.
- ■ Permit approval received.
- ■ Parking, signage, notice and staffing complete.
- ■ Public and emergency access plan confirmed.
- ■ Permit conditions appear on the call sheet.

People and permissions

- ■ Employees, executives, customers and talent listed.
- ■ Participant scheduling owner assigned.
- ■ Appearance releases approved and executed where required.

- ■ Professional talent terms match intended use.
- ■ Voice and likeness uses documented.
- ■ Minor or guardian requirements addressed if applicable.
- ■ Accessibility and accommodation needs included.

Media and rights

- ■ Music source and intended license identified.
- ■ Stock and archival material cleared.
- ■ Photography and artwork cleared.
- ■ Product interfaces and third-party marks reviewed.
- ■ Territory, duration and channel use documented.
- ■ Paid-media use documented.
- ■ Raw footage and project-file terms documented.
- ■ License and release records included in final handoff where agreed.

Accessibility and localization

- ■ Accessibility owner has stated the requirements.
- ■ Caption type and file format confirmed.
- ■ Transcript required or excluded.
- ■ Audio description or media alternative reviewed.
- ■ Player or platform requirement confirmed.
- ■ Target languages and markets named.
- ■ Translation and linguistic review owner assigned.
- ■ Graphics and runtime account for localized text.

Review and delivery

- ■ Working project owner and final approver named.
- ■ Required reviewers mapped to specific decisions.
- ■ Feedback consolidation owner named.
- ■ Review platform and deadlines agreed.
- ■ Included rounds and new-scope process confirmed.
- ■ Picture-lock meaning agreed.
- ■ Master, version, caption and transcript files listed.
- ■ Naming, transfer and acceptance check agreed.

- ☐ Archive or retention terms confirmed.

Readiness decision

Work may begin: [yes / no / conditional]

Open conditions: []

Owner: []

Decision 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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