

Quick-Start Video Checklist

Record, Trim, and Share Simple Videos With ScreenPal

For aging in place professionals: occupational therapists, contractors, designers, remodelers, home care agencies, and more.

Why bother with video? Families trust people they can see and hear. A short video shows your face, your voice, and your know-how. It answers questions once, so you do not have to answer them again and again. YouTube is also one of the most used search sites in the world, so video helps new clients find you.

Part 1: Before You Record

- ☐ **Make a free account at screenpal.com**
You can sign up with your email or your Google account.
- ☐ **Use a computer with a microphone**
Most laptops have one built in. A camera is only needed if you want your face on screen.
- ☐ **Pick ONE topic for your first video**
Small and simple wins. Think of one question your clients ask a lot.
- ☐ **Write 3 bullet points on a sticky note**
This keeps you on track so you do not ramble.
- ☐ **Close email and extra tabs**
No pop-ups or private info should show on your screen.
- ☐ **Sit facing a window for light**
Do not sit with the window behind you. You will look dark.
- ☐ **Do a 10-second test recording**
Play it back. Can you hear yourself clearly?

Part 2: Record

- ☐ Go to screenpal.com and sign in
- ☐ Click the button to start a recording
The first time, it asks to install a small launcher. Say yes. This only happens once per computer.
- ☐ Choose what to record: Screen, Webcam, or Both
- ☐ Drag the dashed frame around the part of your screen to show
Or choose full screen.
- ☐ Check your microphone
Watch the sound bar move when you talk.
- ☐ Click Rec
A short countdown starts. Then talk naturally.
- ☐ Made a mistake? Click Pause.
Take a breath, then click to resume. You do not have to start over.
- ☐ Click Done when you are finished

Say *this with me*: *You do not have to be perfect. Your clients want to hear you, not a TV news anchor.*

Part 3: Trim

Trimming means cutting off the parts you do not want. Most videos need nothing more than this.

- ☐ Click Edit (or edit video) after you finish
Your video opens in a preview.
- ☐ Trim the awkward start
That is the moment you reached for the mouse.
- ☐ Trim the end
That is the moment you reached to click Stop.
- ☐ Cut out long silent spots if you want
Choose the part on the timeline, then cut it.
- ☐ Play it back one time
Make sure it sounds right.

Note: Some editing tools need a paid plan. The basic trim is all most videos need.

Part 4: Save and Publish

- ☐ Give your video a clear name
Example: How a Grab Bar Is Installed
- ☐ Choose where it goes
Save to your ScreenPal account, save to your computer as a video file, or upload to YouTube or Google Drive.
- ☐ Pick a folder you will remember
Many people use the Downloads folder.
- ☐ Click Publish and wait until it finishes
- ☐ Play the finished video once
Check the picture and the sound.

Part 5: Share It

- ☐ Open your ScreenPal account and find your video
- ☐ Click the three dots and choose Share
You get a link you can send, plus an embed code for your website.
- ☐ Open Details to download an MP4 file
This is a copy of your video you can keep on your own computer.
- ☐ Send the link to the person who asked
Or post it on your website, email, or social media.

Five Videos You Can Make This Week

Check the box when you have made it.

- ☐ **Quote walkthrough**
Open your estimate on screen and explain each line. Families love this.
- ☐ **Before-and-after tour**
Scroll through project photos while you explain what changed and why.
- ☐ **Answer your top question**
Example: Will a grab bar damage my tile? Record once. Send it forever.
- ☐ **Welcome video for your website**
Webcam only. About 60 seconds. Say who you are and who you help.
- ☐ **Staff or subcontractor training**
Show how you want a checklist or form filled out.

Tips and Wrap-Up

- ☐ Keep client videos under 3 minutes.
- ☐ Sit facing a window for natural light.
- ☐ Close email so pop-ups do not show.
- ☐ Do a 10-second test before every real recording.
- ☐ Write 3 bullet points so you do not ramble.
- ☐ Good light and clear sound matter more than a fancy background.

Your homework: Make one video this week. Just one. Record, Trim, Share.

Good to know: Button names and what the free plan includes can change over time. Do a practice run first, and follow what you see on your screen. ScreenPal is a separate company. This checklist is a teaching guide and is not connected to or endorsed by ScreenPal.

My first video topic:

Where I will share it:

I will record it by (date):
