

Video Made Simple

A Workbook for Aging in Place Professionals

Plan, record, trim, and share short videos with ScreenPal, a free screen recording tool. No fancy gear. No video skills needed.

This workbook belongs to:

Name: _____

Business: _____

Start date: _____

Created by Esther Kane, CAPS, C.D.S.
AgingInPlaceDirectory.com

How to Use This Workbook

This workbook goes with the Quick-Start Video Checklist. The checklist tells you **what to click**. This workbook helps you decide **what to say** and **who to say it to**.

You can work through it in order, or jump to the section you need. Print it and write in it, or keep it by your computer while you record.

What you will do

- ☐ Pick clear goals for your videos
- ☐ Set up your free ScreenPal account
- ☐ Learn the three ways to record
- ☐ Record, trim, and publish your first video
- ☐ Share it with a link, an embed code, or a file
- ☐ Plan five videos you can make this week
- ☐ Build a simple 30 day plan you can keep up

One rule: Done is better than perfect. Your first video will not be your best video. That is fine. Make it anyway.

Good to know: ScreenPal is a separate company. Button names and plan features can change. Do a practice run and follow what you see on your screen. This workbook is a teaching guide and is not connected to ScreenPal.

Section 1: Why Video Works for Your Business

Think about the last time a client called with a question. Chances are, you have answered that same question many times. A video lets you answer once and send the link every time after.

What video can do for you

- ☐ Shows your face and voice, so families feel they know you before they call
- ☐ Explains hard things, like a quote or a home change, in a way that is easy to follow
- ☐ Saves you time by answering the same questions once
- ☐ Helps new clients find you, because many people search for answers on YouTube
- ☐ Trains staff and helps the same way every time

The question clients ask me MOST is:

What I wish clients understood before they call me:

If I had a video for that, I would send it to:

Section 2: Your Video Goals

Check the goals that matter most to you. Then circle your top one.

- ☐ Get more phone calls and emails from new clients
- ☐ Help clients say yes to a quote or plan with more confidence
- ☐ Answer common questions without long phone calls
- ☐ Show my work before and after
- ☐ Introduce myself on my website
- ☐ Train staff or subcontractors
- ☐ Share what I know with referral partners and other professionals

My TOP goal is:

Who will watch my videos? (Example: adult children of older parents, homeowners in their 60s and 70s, doctors who refer to me)

How will I know it is working? (Example: more calls, fewer repeat questions, more link clicks)

Section 3: Get Set Up

This part takes about ten minutes. You only do most of it once.

- ☐ Go to screenpal.com
- ☐ Click Sign Up and create a free account
Use your email or your Google account.
- ☐ Click the button to start the screen recorder
- ☐ Say yes when it asks to install the small launcher
The first time can take a few minutes. That is normal. On later videos it is fast.
- ☐ Look at the recorder window
You should see a dashed frame, a Rec button, and a few options.

My account notes

Item	My notes
Email used to sign up	
Web browser I use	
Computer I will record on	
Microphone I will use (built in, headset, or other)	

Anything that went wrong, and how I fixed it:

Section 4: Know the Three Ways to Record

Before you press Rec, you choose what the recorder will capture. There are three choices.

Choice	What it records	Good for
Screen	Whatever is on your computer screen, plus your voice	Walking through a quote, photos, a website, or a form
Webcam	Just you, from your computer camera, plus your voice	A welcome video or a short answer to a question
Both	Your screen with a small picture of you in the corner	Teaching, when you want clients to see you and the screen

Other settings to know

- ☐ **Size:** Drag the dashed frame around part of your screen, or choose full screen.
- ☐ **Narration:** This is your microphone. Watch the sound bar move when you talk.
- ☐ **Time limit:** The free recorder has a time limit for each recording. Check what yours says on screen. Short videos are best anyway.
- ☐ **Computer sound:** Recording sound that plays on your computer may need a paid plan. Check what your account offers.

For my first video, I will record (circle one): Screen Webcam Both. Why:

The part of my screen I want to show is:

Section 5: Record Your Video

Follow these steps in order. Check each one off as you go.

- ☐ Open the recorder and choose Screen, Webcam, or Both
- ☐ Set the frame around what you want to show
- ☐ Check the microphone bar moves when you talk
- ☐ Take a slow breath
- ☐ Click Rec and wait for the countdown
- ☐ Talk naturally, like you are talking to one client
Use your three bullet points. Do not read a script word for word.
- ☐ Need a break or made a mistake? Click Pause
Breathe, then click to resume. You do not need to start over.
- ☐ Click Done when you finish

Your 10-Second Sound Check

Do this before every real recording.

- ☐ Record 10 seconds. Say your name and what the video is about.
- ☐ Play it back.
- ☐ Can you hear every word?
- ☐ If not, move closer to the microphone or try a different one, then test again.

Your Three Bullet Points

Write them here, then copy them onto a sticky note and put it by your screen.

1.

2.

3.

Section 6: Light, Sound, and Calm

People worry about the background. It matters much less than they think. What matters most is your information, then the light, and then the sound.

Quick room check

- ☐ I am facing a window or a lamp
Do not sit with the bright window behind you.
- ☐ The room is quiet
Turn off the TV, the radio, and fans if you can.
- ☐ My phone is silent
- ☐ Email and chat are closed
No pop-ups and no private client info on screen.
- ☐ The part of the screen I am showing is tidy
Close extra tabs and files.
- ☐ I have water nearby
- ☐ I smiled before I pressed Rec
It shows in your voice.

Where in my home or office is the best spot to record?

What could get in my way (noise, pets, interruptions), and what will I do about it?

Remember: Your clients want to hear *you*, not a TV news anchor. A warm, clear, real voice wins every time.

Section 7: Trim Your Video

Trimming means cutting off the parts you do not want. Most videos need only two cuts: the start and the end.

- ☐ Open your video in the editor
- ☐ Cut off the awkward start, when you reached for the mouse
- ☐ Cut off the awkward end, when you reached to stop
- ☐ Cut out any long silent spots (dead air) if you want
- ☐ Play the whole video back one time
- ☐ Does it sound right? If yes, you are done.

Some editing tools need a paid plan. Start with the free trim. You can always upgrade later if you find you need more.

My trim notes

Video name	What I cut	Time cut (start / end)

What I noticed about myself when I watched my video:

One thing I will do differently next time:

Section 8: Save, Publish, and Share

When you are happy with your video, you choose where it lives.

Choice	What it means	I will use it for
ScreenPal account	Your video stays in your account. You get a link to send.	
File on my computer	A video file (MP4) you can keep, email, or put in a slide show.	
YouTube or Google Drive	You send your video straight to one of those sites.	
Embed code	A bit of code that puts the video on your own web page.	

Publish steps

- ☐ Give the video a clear name that says what it is about
- ☐ Choose where to save it
- ☐ If saving to my computer, pick a folder I will remember
- ☐ Click Publish and wait for it to finish
- ☐ Click Done, then play the finished video once

Share steps

- ☐ Open my ScreenPal account and find the video
- ☐ Click the three dots and choose Share
- ☐ Copy the link, or the embed code for my website
- ☐ Open Details if I want to download the MP4
- ☐ Send the link to the person who needed it

Section 9: Plan Five Videos You Can Make This Week

Pick at least one. Plan it here. Keep each client video under three minutes.

Video idea	My topic and who it is for	Date I will record it
1. Quote walkthrough Show your estimate on screen and explain each line.		
2. Before-and-after tour Scroll through project photos and explain what changed and why.		
3. Answer a top question Example: Will a grab bar damage my tile?		
4. Welcome video Webcam only. About 60 seconds. Who you are and who you help.		
5. Staff or helper training Show how you want a checklist or form filled out.		

The first one I will make is number ____ because:

Section 10: Video Planner #1

Use one page for each video you plan. Copy this page if you need more.

Video title:

Who is this for?

The ONE thing I want them to know or do after watching:

My three bullet points

How I will start (say my name and what this video is about):

How I will end (a clear next step: call me, click the link, book a visit):

Before I press Rec

- ☐ Sound check done
- ☐ Room check done
- ☐ Sticky note ready
- ☐ Under 3 minutes

Section 11: Video Planner #2

Use one page for each video you plan. Copy this page if you need more.

Video title:

Who is this for?

The ONE thing I want them to know or do after watching:

My three bullet points

How I will start (say my name and what this video is about):

How I will end (a clear next step: call me, click the link, book a visit):

Before I press Rec

- ☐ Sound check done
- ☐ Room check done
- ☐ Sticky note ready
- ☐ Under 3 minutes

Section 12: My Top Client Questions

Every question on this list can become a short video. Write the questions you hear most. Then check them off as you record answers.

Question clients ask	Video made? (date)	Link saved here

Section 13: Where Will My Videos Live?

A video only helps if people see it. Check every place you will use yours.

- ☐ On my website, on the home or contact page
- ☐ Sent in a reply email when a client asks a question
- ☐ In my email signature or newsletter
- ☐ On social media, such as Facebook, LinkedIn, or YouTube
- ☐ In a slide show or class
- ☐ In my training for staff or subcontractors
- ☐ In a text message to a family member who needs an answer
- ☐ Shared with a referral partner, such as a doctor or social worker

My favorite place from the list, and why:

A person who would love one of my videos:

What I will say when I send it to them:

Section 14: My 30 Day Video Plan

Small and steady beats big and rare. Aim for one video each week for four weeks.

Week	Video I will make	Where I will share it	Done
Week 1			
Week 2			
Week 3			
Week 4			

What might get in my way, and my plan for it:

Who can I ask to hold me to it?

Section 15: Look Back and Keep Going

Fill this in after your first month.

- ☐ I made at least one video
- ☐ I trimmed it and listened to it from start to finish
- ☐ I shared it with at least one person
- ☐ Someone replied, called, or clicked

What went well:

What was hard:

What I will do next month:

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

Notes
