

# Loom & Async Video Communication — Workbook

This workbook turns the course into a working async-video practice. You will set up Loom, record and ship real videos against a structure, measure what landed in the analytics, and write the team norms that make the habit stick. Work through one section per course module, and use the templates to plan, track, and standardise your videos.

## Getting Set Up and Recording Your First Loom

Install Loom, learn the recording modes, and ship a clean first video using a pre-flight routine.

### Checklist: Setup checklist

Complete every item before recording your first video. Tick each one as you go.

- Created a Loom account with my work email
- Installed the desktop app or Chrome extension (or both)
- Granted Screen Recording, Camera, and Microphone permissions in system settings
- Pinned Loom so it is one click away
- Tested all three modes: Screen + Cam, Screen Only, and Cam Only
- Confirmed my microphone input is the device I actually want to use

### Worksheet: My recording environment audit

Fill in each field honestly, then fix anything marked as a problem before your first real video.  
Microphone I will use (built-in / earbuds / external mic)

---

Distance from mic to mouth

---

---

Light source and its position relative to my face

---

---

What is visible in my camera background

---

---

How I will silence notifications (macOS Focus / Windows Do Not Disturb)

---

---

Default capture choice (single window / full screen) and why

---

### Exercise: Record your first 90-second Loom

Run the pre-flight checklist, then record a Screen + Cam video introducing yourself and walking through one tool or document you use daily. Keep it under 90 seconds. Watch it back once and note what you would change.

- Did I start with energy and a clear first sentence, or a filler word?

---

- Was my audio clear and free of background noise?

---

- Did anything private or distracting appear on screen?

- 
- What one thing will I change in my next recording?
- 

## Recording Videos People Actually Watch

Apply a repeatable structure, control length, and use on-screen tools to direct attention.

### Worksheet: Hook, Context, Walkthrough, Ask planner

Before your next real video, write each part in one or two sentences. Read the hook and ask out loud before recording.

Hook (who I am, what this video does, estimated length)

---

Context (only the background the viewer needs)

---

Walkthrough (the 2 to 4 things I will show, in order)

---

Ask (the single next step I want, and by when)

---

Who is this for (name the primary viewer)

---

Target length

---

---

### Exercise: The two-take challenge

Record a 2 to 4 minute update or feedback video using your planner. Give yourself at most two takes, then ship whichever is better. Resist a third take.

- Did I front-load the point in the first 15 seconds?

---

- Did I name the length so the viewer knew what to expect?

---

- Did I end with exactly one clear ask?

---

- How did letting go after two takes feel, and what did it save me in time?

---

### Checklist: On-screen clarity checklist

Use this while recording any screen walkthrough to keep viewers following along.

- I narrated what I was about to do before doing it
- I paused my cursor on each element I mentioned
- I used the drawing tool or click highlighting on key items
- I scrolled slowly and stopped, rather than darting around
- I kept the whole video under five minutes (or added chapters)

## Editing, CTAs, and Polishing the Final Video

Tighten recordings with editing, then add the CTA, chapters, thumbnail, and captions that drive response.

### Checklist: Pre-share polish checklist

Run this on every video before you share the link. Aim to finish in two minutes for a short video.

- Trimmed dead air from the start and the end
- Cut any major fumble from the middle and previewed the join
- Ran Remove Filler Words (if on a plan that supports it) and reviewed the result
- Wrote a specific title, not Untitled recording
- Set a clean custom thumbnail
- Added a call-to-action button or stated the ask clearly
- Added chapters if the video runs longer than a few minutes
- Glanced at the auto transcript and fixed names or jargon

### Exercise: Edit and package a recording

Take a recording from Module 2 and fully package it: trim, run filler-word removal, set a title and thumbnail, add a CTA, and turn on captions. Time how long the editing takes.

- How long did editing actually take versus re-recording?

---

- What did the CTA prompt the viewer to do, and is it the right next step?

---

- Does the thumbnail look intentional in a Slack or email preview?

---

- Did the filler-word removal clip anything I needed to fix?

---

### Worksheet: CTA and title design

Plan the package elements for a specific video you will send this week.

Video title (specific and searchable)

---

Thumbnail choice (frame or moment I will use)

---

CTA button label (Book a Call / Reply / Open Doc / other)

---

CTA destination link

---

Chapter titles (if applicable)

---

Spoken closing ask that matches the button

---

---

## Sharing, Analytics, and Team Workflows

Share securely, learn from viewer analytics, and write the norms that make async video last.

### Worksheet: Pre-share privacy check

Complete this for any video that touches client data, pricing, or confidential work before you copy the link.

What does this video reveal on screen

---

Who should be able to see it

---

Permission setting I will use (workspace / specific people / password / link)

---

Did I record a single window to avoid exposing other tabs

---

Should downloads be disabled (yes / no)

---

Is link expiry needed (yes / no)

---

### Exercise: Read your analytics

Pick a video you sent at least two days ago. Open its activity panel and study the data, then plan one concrete improvement for your next video.

- Who watched, and did the key people watch?
  - Where did the engagement graph drop off, and why might that be?
  - What reactions or comments did it get, and what do they tell me?
  - What single change will make my next video tighter where viewers dropped off?
- 

### Worksheet: Team norms draft

Draft your team's async-video standards. Share this as a one-page guide.

Naming convention (e.g. Project Topic Date)

---

Where videos live (workspaces / folders by team, client, or project)

---

Default privacy setting for internal videos

---

Default privacy setting for client videos

---

Response etiquette (is a reaction or comment a valid reply)

---

Decision rule for video versus text versus meeting

---

---

## Checklist: Make-it-stick checklist

Use this over the first month to embed the habit across the team.

- A lead or manager is sending updates and feedback as Looms consistently
- The one-page norms guide is written and shared
- Good example videos are recognised publicly
- Folders or workspaces are set up and in use
- We scheduled a 30-day review of what is getting watched and which meetings were replaced

## Your Action Plan

1. Install Loom on desktop and as a browser extension, and grant all required permissions.
2. Print the pre-flight checklist and keep it at your desk for two weeks.
3. Record and ship one real Loom every working day for one week, using the Hook, Context, Walkthrough, Ask structure.
4. Apply the two-take rule and stop chasing perfect recordings.
5. Package every video with a specific title, custom thumbnail, captions, and a single CTA before sharing.
6. Set the correct privacy permission on every video by matching it to the content.
7. Review the analytics on three sent videos and identify where viewers drop off.
8. Draft and share a one-page team norms guide covering naming, storage, privacy, and the video-versus-text-versus-meeting rule.
9. Lead by example: send your own updates as video for four weeks and recognise good examples publicly.
10. Hold a 30-day review to confirm which meetings have been replaced and tune the norms.









