CoachAccountable's

Guide to Making a Welcome Screencast for New Clients

We want clients to feel comfortable in their new coaching portal: clear about where things are, and tuned into why they matter. A brief video tour that introduces clients to the portal is a powerful way to achieve that.

This guide outlines a simple and effective way to produce such a video tour, and includes a sample script that gives a tidy introduction to key features of CA that will help them feel right at home.

One of the challenges of creating such a video intro is to find the right level of detail. While it can be tempting to go deep into several features, it's best to remain brief. By focusing on the big picture we can instill in our clients the "why" behind CA, which makes exploration to figure out the "how" much more likely.

Here are the platform topics we commonly want to introduce to new clients in a tour:

- Overview & Appointments
- Stream
- Metrics
- Actions
- Session Notes
- Worksheets
- Journal
- Files
- Whiteboards
- My Account page
- Calendar sync
- Lightbulbs for topic specific help

Notice how most of these are simply going down the left menu that the client sees when logged in. Based on your style, you may want to de-emphasize (or remove entirely) certain parts.

The Sample Script:

Welcome to our coaching portal, let me show you around! As a companion to our conversations it will play a large role in you getting the results you came for, and this tour will help you see why.

The system is broken into sections, and you can get around to each of them from this menu on the left. (Here at the top you see me, and this little email button allows you to send me a message whenever.)

First is Overview: this shows the things that are upcoming in our relationship, soonest items first. Over here in the Appointments tab you can see our upcoming appointments. By clicking the gear for one you can set reminders, reschedule, or cancel. You can book with me by clicking this +Appointment button.

Next let's jump to Metrics. Here we'll set up tracking for whatever's important to you. This one is a sample to give you the idea, and we'll work together to define these as games worth playing over the coming weeks and months.

Next is Actions. We'll create a game plan together each week. Having them here will help you take meaningful action that will move you forward. You're also going to see a growing record of accomplishment in the "Past" area.

Next is Session Notes. I'll generally email the notes from our sessions right to you, but this area will become a growing treasure trove of insights that you'll want to revisit now and then.

Next is Worksheets. I'll generally email you new Worksheet assignments which will put you one click away from working on them, but here you'll be able to find any and all outstanding assignments. You'll also be able to review completed ones here.

Next is Journal. Feel free to write up any journal entries about your experiences here; they'll be emailed to me and I'll be happy to comment. You can also mark your entries private, for your eyes only.

Next is Files. This is where you'll find files that I've shared with you. You can also share files with me, either as an upload or a hyperlink.

Next is Whiteboards. These are good for long term goals, easy-access information, and a general place to store ideas to revisit later. Sometimes I'll be sharing these with you, and feel free to create one to share with me.

Finally, back to the Stream area: this is a combined listing of ALL the other things I've just shown you, ordered with the newest up top. From here you can post comments on any particular item, making it easy for you and I to have mini-conversations about a given thing.

Next let me show you the My Account page: from your name here at the top right, you'll find it. Here you can update your information. Little tip: if you enter your cell number the system will allow you to set reminders delivered by text, instead of email, which can be very handy.

Take a moment here to sync your calendar: with a few clicks, our appointments, current AND future, will automatically appear in your calendar of choice.

And that's the gist--what everything is and where to find it. If you need more information about a particular thing, you can click the nearby lightbulb icon, and a help article will pop right up.

Looping back to what I said earlier about you getting what you came for: having me as your coach means getting MORE than just our sessions. This portal is how we're going to capture the gems from the conversations we'll be having, and turn them into an actionable plan. It's how I'm going to be in touch and have your back between sessions. And you're going to see the progress and results unfold right here as we go.

If you haven't already, go schedule your next appointment with me. I'm excited to talk with you and get going in earnest.

The Sample Script *with comments*:

These comments give a little more context about the why behind various parts of this script, and call out places that are ripe for customizing to have the tour better fit with YOUR way of doing things.

Welcome to our coaching portal, let me show you around! As a companion to our conversations it will play a large role in you getting the results you came for, and this tour will help you see why. *Very early on we want to tee up the "why" behind having a platform at all: it gives the lens through which to listen and appreciate the features we'll cover.*

The system is broken into sections, and you can get around to each of them from this menu on the left. (Here at the top you see me, and this little email button allows you to send me a message whenever.) *This sentence is quite optional, but can be nice to set up the understanding that this is a tool for communication.*

First is Overview: this shows the things that are upcoming in our relationship, soonest items first. Over here in the Appointments tab you can see our upcoming appointments. By clicking the gear for one you can set reminders, reschedule, or cancel. You can book with me by clicking this +Appointment button. *You may want to modify this to your specific rules of how and when clients can book with you (e.g. Engagements).*

Next let's jump to Metrics. Here we'll set up tracking for whatever's important to you. This one is a sample to give you the idea, and we'll work together to define these as games worth playing over the coming weeks and months. *Note how we skip Stream on the first pass, because the Stream has more context to make sense after covering all the other items.*

Next is Actions. We'll create a game plan together each week. Having them here will help you take meaningful action that will move you forward. You're also going to see a growing record of accomplishment in the "Past" area.

Next is Session Notes. I'll generally email the notes from our sessions right to you, but this area will become a growing treasure trove of insights that you'll want to revisit now and then.

Next is Worksheets. I'll generally email you new Worksheet assignments which will put you one click away from working on them, but here you'll be able to find any and all outstanding assignments. You'll also be able to review completed ones here.

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Next is Whiteboards. These are good for long term goals, easy-access information, and a general place to store ideas to revisit later. Sometimes I'll be sharing these with you, and feel free to create one to share with me. *This is ripe for tweaking according to how specifically you use Whiteboards with your clients, if at all!*

Finally, back to the Stream area: this is a combined listing of ALL the other things I've just shown you, ordered with the newest up top. From here you can post comments on any particular item, making it easy for you and I to have mini-conversations about a given thing.

Next let me show you the My Account page: from your name here at the top right, you'll find it. Here you can update your information. Little tip: if you enter your cell number the system will allow you to set reminders delivered by text, instead of email, which can be very handy. *You'll want to remove this if you're working with clients in countries not supported for SMS.*

Take a moment here to sync your calendar: with a few clicks, our appointments, current AND future, will automatically appear in your calendar of choice.

And that's the gist--what everything is and where to find it. If you need more information about a particular thing, you can click the nearby lightbulb icon, and a help article will pop right up.

Looping back to what I said earlier about you getting what you came for: having me as your coach means getting MORE than just our sessions. This portal is how we're going to capture the gems from the conversations we'll be having, and turn them into an actionable plan. It's how I'm going to be in touch and have your back between sessions. And you're going to see the progress and results unfold right here as we go. *This is worth touting loud and proud as a genuine differentiator. The sentences that follow are generally true but you may wish to further tailor these ideas to fully align with your style.*

If you haven't already, go schedule your next appointment with me. I'm excited to talk with you and get going in earnest. *Or suggest they do whatever else is fitting to actually use the system. Courses are great here for pre-loading in whatever bits they should interact with during their first run.*

Tips for Producing the Screencast

Writing up a script, either the above verbatim, or with light edits, or something completely different, is an excellent way to get your thoughts clear on what you want your clients to get. When it comes to actual delivery, you can read it word for word or just riff naturally (treating the script more like a loose guide).

It's easy to get carried away thinking this needs to be a formal, professionally produced video, but that's not required! You simply narrating as you click around while logged in one of your clients is sufficient. (In fact, skipping fancy production values can give your video a certain gritty authenticity that resonates better.)

If you've got screen recording software of choice under your belt (Camtasia has been my go to for years), you're already good to go. If you don't, Loom or screencast-o-matic will have you up and recording screencasts with your narration in no time.