



Training Video

Script Templates

Universal Script Template

Scene	Narration	On-screen / Visuals
1	Open with a situation your learner will recognize. A moment, a mistake, a gap. Something that makes them think "that's me."	Avatar. Title card with video name.
2	Why does this matter? Name the consequence of not addressing it for the learner, their team, or the business.	On-screen text reinforcing the stakes.
3	State what the learner will be able to do by the end of this video. Be specific. One observable action, not a theme.	On-screen text listing the outcome.
4	Introduce your first key point in one sentence.	On-screen text.
5	Show it in context. A screen recording, a scenario, a before/after. Don't just repeat the point. Illustrate it.	Screen recording, animation, or scenario visual.
6	Introduce your second key point.	On-screen text.
7	Show it in context.	Screen recording, animation, or scenario visual.

8	Introduce your third key point.	On-screen text.
9	Show it in context.	Screen recording, animation, or scenario visual.
10	Name the most common mistake. Be specific. Vague warnings don't change behavior.	On-screen text naming the mistake.
11	Explain what to do instead, and why it matters.	On-screen text with the correct behavior.
12	Optional. Add a knowledge check or decision prompt after a key step or before the next action, where it reinforces the most important behavior.	Question on screen. Learner selects a response before continuing.
13	Tell the learner exactly what to do next and where to get help. One action, one resource.	On-screen text with link or resource. Avatar closes the video.

Completed Example

Scenario: New CRM Rollout

Learning Objective: This video is for sales team members who currently don't know how to use the new CRM. After watching, sales team members should be able to log a customer interaction, set a follow-up reminder, and pull a pipeline report so that follow-ups don't fall through the cracks and deals are tracked consistently from day one.

Scene	Narration	On-screen / Visuals
1	Starting next Monday, the sales team moves to a new CRM. If you've ever lost a deal because a follow-up fell through the cracks, this video is for you.	Avatar. Title card: "Your guide to the new CRM."
2	Missed follow-ups cost deals. The new CRM is designed to prevent that, but only if you know how to use it from day one.	On-screen text: "Log it. Track it. Close it."
3	By the end of this video, you'll be able to log a customer interaction, set a follow-up reminder, and pull a pipeline report.	On-screen text listing the three tasks.
4	First: log every customer interaction the same day it happens.	On-screen text: "Step 1: Log the interaction."
5	Open the CRM, select the relevant contact, and click "Log Activity." Choose the interaction type: call, email, or meeting. Add your notes and hit save.	Screen recording of the log activity flow, timed with narration.

6	Next: set a follow-up reminder before you close the contact record.	On-screen text: "Step 2: Set the reminder."
7	On the contact page, select "Add Task." Set a due date, assign it to yourself, and add a short note so you remember the context when it surfaces.	Screen recording of the add task flow.
8	Finally: use the pipeline report to stay on top of where every deal stands.	On-screen text: "Step 3: Check your pipeline."
9	Go to the Reports tab, select "Pipeline by Stage," and filter by your name. Export as a CSV or share directly with your manager.	Screen recording of the reports tab, highlighting the filter and export options.
10	The most common mistake is logging activities after the fact, two or three days later, when the details are fuzzy. The second is skipping the follow-up task entirely. If it's not in the CRM, it doesn't exist.	On-screen text: "Log same day." "Always set a task."
11	Log the interaction before you move on to the next call. Set the task before you close the record. Two habits, every time.	On-screen text reinforcing both behaviors.
12	Quick check: you've just finished a call with a prospect. What do you do first? A) Send a follow-up email. B) Log the interaction in the CRM. C) Update the pipeline report.	Question on screen with three response options. Correct answer: B. Brief on-screen feedback for each choice.

13	That covers everything you need for day one. If you run into issues, the IT helpdesk has a dedicated CRM support channel. You'll find the link in your onboarding portal.	On-screen text with helpdesk link. Avatar closes the video.
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