



Written Scripts: Change Management Communication with Loom Video

i In this example, we'll dive into the journey of a Revenue Operations leader who is leading the charge in transitioning to a new CRM system as part of a broader sales process improvement effort.

The “Announcement” [🔗](#)

Template	Sample Script
Say hello “Hey [recipients]!”	“Hey Team!”
TL;DR- What’s changing? “In this Loom, I’m excited to announce an important change to our [specific process or tool].”	“In this Loom, I’m excited to announce an important change to our sales process. We are transitioning from our current lead tracking method to a new, more efficient CRM system starting next week.”
Why It Matters “This change is important because [...reason].” <ul style="list-style-type: none">• ...it will improve efficiency• ...it aligns with our strategic goals• ...it addresses current challenges• ...it enhances our capabilities	“This change is important because it will significantly enhance how we manage and track our sales leads. By automating many of our manual tasks, we’ll be able to close deals more efficiently and gain better insights into our customer interactions.”
Set the Stage “I’ve pulled up [resource/visual] to help illustrate the new process.”	“I’ve pulled up our new sales process flowchart in Confluence on my screen to help illustrate how this new system will work.”
Benefits “With this change, you can expect [...benefits].” <ul style="list-style-type: none">• ...better data accuracy• ...streamlined workflows• ...improved collaboration• ...enhanced customer experience	“With this change, you can expect improved data accuracy, streamlined workflows, and an overall enhanced customer experience.”
Next Steps “Here’s what you need to know moving forward:”	“Here’s what you need to know moving forward: By this Friday, you’ll receive an invitation to join the new CRM in your inbox.”

<ul style="list-style-type: none"> • ...key dates • ...training sessions • ...resources available 	
Call to Action “Please [action needed] by [date].”	<i>“Please ensure you verify your email and log in by Monday to get everything set up on your end.”</i>
CTA & Closing “I’ve linked [resource] in the CTA button on this Loom. If you have any questions or need more information, feel free to reach out or drop a comment below. Thanks for watching!”	<i>“I’ve linked a Confluence page with the full project plan in the CTA button if you want to take a closer look. If you have any questions or need more information, feel free to reach out or drop a comment below. Thanks for watching, and let’s make this transition a smooth one!”</i>

The “How-To” [🔗](#)

Template	Sample Script
Say hello “Hey [recipients]!	<i>“Hey Team!”</i>
One sentence TL;DR “In this Loom, I’m going to show you how to [action].”	<i>“In this Loom, I’m going to show you how to set up your profile and notifications in our new CRM system.”</i>
Why it matters “This is [relevant/important] because [...reason]” <ul style="list-style-type: none"> • ...an action is required • ...a milestone or deadline is approaching • ...something has changed • ...it’s table stakes information • ...you may find it helpful or interesting 	<i>“This is important because it ensures you receive the correct alerts and updates, helping you stay informed and on top of your sales activities.”</i>
Your objective “This should help you [...goal]” <ul style="list-style-type: none"> • ...take an action • ...know where to find something • ...have clarity • ...know what to do next • ...see something • ...self-serve a process 	<i>“This should help you customize your settings to best fit your workflow, ensuring that you don’t miss any critical information or tasks.”</i>
Set the Stage “Here I have [what’s on your screen] on my screen, and I’m going to walk you through [steps/process].”	<i>“Here I have the CRM dashboard on my screen, and I’m going to walk you through the steps to set up your profile and notifications.”</i>
Voiceover your screen share Voiceover the steps you’re taking as you do so on your screen	<i>“First, click on your profile icon in the top right corner of the dashboard. Next, select ‘Settings’ from the dropdown menu.</i>

	<p><i>In the settings menu, you'll find options to personalize your profile, such as uploading a profile picture and adding your contact information.</i></p> <p><i>Scroll down to the 'Notifications' section, where you can choose which alerts you'd like to receive and how frequently.</i></p> <p><i>Make sure to save your changes before exiting the settings menu."</i></p>
<p>Call to Action</p> <p>"Now that you've watched this Loom, please [do this thing]."</p> <p>(Optional) "I'll link [resource] in the CTA button on this Loom if you want to take a closer look."</p>	<p><i>Now that you've watched this Loom, please take a few minutes to set up your profile and notifications. This will ensure you're fully prepared to engage with our new CRM system effectively.</i></p> <p><i>I'll link the CRM user guide that's in Confluence in the CTA button on this Loom if you want to take a closer look at other customization options available."</i></p>
<p>CTA & Closing</p> <p>"If you have any questions, drop them in the Loom comments below. Thanks for watching!"</p>	<p><i>"If you have any questions, drop them in the Loom comments below. Thanks for watching!"</i></p>

The "Quick Update" [🔗](#)

Template	Sample Script
<p>Say hello</p> <p><i>"Hey [recipients]!"</i></p>	<p><i>"Hey Team!"</i></p>
<p>TL;DR</p> <p><i>"In this Loom, I'm going to share [update] on [work item]."</i></p>	<p><i>"In this Loom, I'm excited to share some great early wins from our CRM implementation."</i></p>
<p>Why It Matters</p> <p><i>"This update is important because [...reason]"</i></p> <ul style="list-style-type: none"> • ...it affects our timeline • ...there are key changes • ...it's just an FYI • ...it's exciting and I want to share • ...it's crucial for upcoming decisions • ...it impacts something • ...you'll need this information for your tasks • ...I'm blocked or need feedback 	<p><i>"This update is important because it highlights key successes that demonstrate the system's positive impact on our workflow and efficiency."</i></p>
<p>Set the Stage</p> <p><i>"I've pulled up [resource/visual] to show you where we are with [work item]."</i></p>	<p><i>"I've pulled up our project plan in Jira so you can see how we're progressing toward our milestones."</i></p>
<p>Current Status</p> <p><i>"Here's where we currently stand with [work item]."</i></p>	<p><i>"We're progressing smoothly with the integration, and the initial response has been very positive."</i></p>

<p>Recent Developments</p> <p><i>“Since the last update, here’s what has changed or progressed:”</i></p> <ul style="list-style-type: none"> • ...a new milestone has been reached • ...there’s been a shift in priorities • ...we’ve encountered challenges • ...there are new opportunities 	<p><i>“During testing, we’ve seen that the CRM’s automated email feature has reduced the time spent on follow-ups by 25% across the team. Additionally, the integrated task manager has helped reduce missed tasks by 40%, ensuring that we stay on top of client requests more efficiently than before.”</i></p>
<p>Next Steps</p> <p><i>“Moving forward, here’s what to expect:”</i></p> <ul style="list-style-type: none"> • ...upcoming tasks or deadlines • ...who’s responsible for what • ...any required actions from the team 	<p><i>“As we continue, we’ll keep monitoring these improvements and gather more insights to ensure the system meets all our needs.”</i></p>
<p>Call to Action</p> <ul style="list-style-type: none"> • <i>“Please make sure to [action needed from the viewer] by [date or time].”</i> • (Optional) <i>“I’ll link [resource] in the CTA button on this Loom if you want more details.”</i> 	<p><i>“Keep sharing your experiences and insights with us in the meantime. Your feedback is crucial as we move forward.”</i></p>
<p>Closing</p> <ul style="list-style-type: none"> • <i>“If you have any questions or need further clarification, drop them in the Loom comments below. Thanks for watching!”</i> 	<p><i>“If you have any questions or want to share more wins, drop them in the Loom comments below. Thanks for all your hard work and enthusiasm—it’s truly making a difference!”</i></p>