



# Best Practices With Loom

In this document are strategies you can use to your advantage when recording Loom videos, sharing them with your prospects, and following up with prospects if they don't reply back to your initial message with the video.

Enjoy!

## Recording the Loom

The whole purpose of the Loom video is to provide free value to prospects while putting your expertise on display.

This can be in the form of auditing their email flows or website, pointing out some things you notice with their social presence, or a quick analysis of their email opt-in pop up.

*Bottom line, no matter what service you offer, the Loom is an opportunity to put your knowledge and skills on display in a video so the prospect is intrigued enough to get on a call with you.*

It's best practice to save any talk about pricing or testimonials for the call!

## Opening The Video

Start the video with a clear agenda of what will be covered in it.

If you're outlining 3 strategies prospects can implement, start the video by saying "Hey NAME, XXX here from KnowledgeX. In this video I'll be going over 3 strategies you can implement to generate COMPANY more revenue."

Then, go into the 3 strategies you lay out for them. This way, the prospect doesn't feel overwhelmed and knows exactly what to expect for the video.



Some other ways to open the video:

*“The two insights i want to share with you on this video is”*

*“The reason I’m creating this video for you is”*

*“I happened to notice X about your website, here’s a strategy I recommend to fix it”*

## The Bulk of The Video

Instead of pitching your services, as mentioned above, focus the video fully on actionable strategies the prospect can implement into their own business.

Of course, the goal of a Loom is to get a call booked... But by providing free value, you prove you know what you’re talking about and earn their trust.

Use the middle of the video to go into more detail on the “3 strategies” you introduced at the beginning of the video.

## Ending the Video

Before wrapping up the video, make sure the prospect knows a clear next step to take after they watch it.

To make sure they’re aware of the next step, wrap up the video with a call-to-action.

A few examples:

*“You likely found something in the video you can apply right away... Happy to hop on a quick call to explain further if you’re open to it.”*

*“If you’d like to discuss any of this in more detail, the next best step is to hop on a quick call. Feel free to let me know what times work for you, or book directly using my calendar link.”*



## Sending The Video Via Email

Once the video is recorded, the next step is sending it to the prospect in a way that makes sure they actually see your email, open the video, and watch it the whole way.

### Embedding the Video Properly

Instead of sending the video as a link, make sure you send it as a formatted thumbnail so the prospect can see a preview of the video. [Here's a video showing you how to do that.](#)

### Titling The Loom

Make sure you title the Loom video as either “for NAME”, “strategies for COMPANY”, or something along those lines rather than leaving it as a generic title. This adds an extra step of personalization. To do this, simply click the title line on Loom once you finish recording the video.

### The Email Message

Sending the thumbnail should do the trick to get prospects to view it, but make sure you entice them even further with a quick message.

Here's a great opener: “Below is your custom video... towards the middle of the video you'll notice STRATEGY.” Insert a strategy you discussed in the video, this will get them to open it and watch until at least the part where you talk about that strategy.

Also make sure to tie your messaging back to your initial email conversation. If the prior conversation was about optimizing their landing page for example, mention that in this email as well.



A few other pointers here:

- Put all text above the email thumbnail, otherwise prospects probably won't see them.
- NEVER apologize for any sort of delay or lateness unless the video is sent 5+ days after. A 1-3 day time delay is no problem, apologizing diminishes your message.

## Following Up

The reality of cold outreach is not every prospect will view the video and reply back right after your first email. Instead of moving on, make sure you follow up with them until you get a reply!

## In Summary

The entire purpose of the Loom video is to get prospects interested in what you're selling. These videos lead to extremely qualified, high-intent calls that have a higher chance of closing compared to calls that come from regular cold email.

Be sure to use actionable strategies in the Loom video itself, format it properly in the email, and then continue following up with the prospect until they reply back to you expressing interest or telling you they're not interested.

Hope this was helpful!