

YouTube Marketing — Workbook

This workbook is a hands-on companion to the YouTube Marketing course. Work through each section after completing the matching module — the exercises, worksheets, and checklists are designed to produce real deliverables you will use to launch and grow your channel, not just notes you read once.

Channel Strategy and Niche Positioning

Complete these activities to lock in a defensible niche, define your ideal viewer, and produce a written 12-week content plan before recording your first video.

Exercise: Niche Viability Scoring

For each of your top 3 candidate niches, score each factor out of 10 and total the score. The niche with the highest total (and no score below 5 on Monetization Density) is your starting point. Use TubeBuddy or VidIQ free tier for keyword volume data before scoring.

- List your 3 candidate niches. For each, what is your honest score (1–10) for Search Demand, CPM/Monetization Density, Content Depth (can you produce 50+ videos?), and Competition Gap?

- Which niche scored highest overall? What is the one risk factor you identified, and how will you mitigate it?

- Write one sentence describing the specific viewer you are making this channel for — include their job, main frustration, and the single transformation your channel delivers.

Worksheet: Channel Positioning Brief

Fill in every field to create your one-page channel brief. Keep it pinned in your workspace and review it before writing each new script. This document is the filter for every creative decision.

Channel name (or working title)

Primary niche (3–5 words)

Content pillars (list 3–4 broad sub-topics)

Ideal viewer: age range + occupation

Ideal viewer: primary frustration (exact words they use)

Ideal viewer: desired transformation after watching your channel

Positioning statement: I make [content type] for [ideal viewer] who is frustrated by [gap in existing content]

Top 3 competitor channels and their single biggest weakness

Your credibility signal (why should a viewer trust you on this topic?)

Upload schedule: day of week + frequency

Checklist: 12-Week Content Plan Readiness Checklist

- Identified and scored 3 candidate niches using the viability scorecard
- Selected a primary niche with Search Demand score 7+ and Monetization Density 6+
- Defined 3–4 content pillars for the chosen niche
- Written a one-sentence positioning statement and tested it with at least 2 real people
- Listed 15 video topics per content pillar (60 topics minimum)
- Tagged each topic as Search (S) or Browse (B) and assigned a keyword volume score (H/M/L)
- Selected 12 topics for the first 12 weeks, distributing across all pillars
- Written a working title for each of the 12 planned videos
- Confirmed upload schedule (specific day + frequency) and added it to calendar
- Created a shared content planning spreadsheet and shared access with any collaborators

YouTube SEO and Keyword Research

Build a validated keyword bank, write optimised metadata for your first 5 videos, and establish a thumbnail design system before your first upload.

Exercise: Keyword Bank Build

Use the keyword research workflow from Module 2 to build a 30-keyword bank for your channel. For each keyword, record the tool score, competition level, and search intent before ranking them. Complete this exercise using TubeBuddy or VidIQ on a real YouTube search session.

- List 10 keywords from YouTube autocomplete for your primary niche. For each, record the TubeBuddy or VidIQ keyword score (0–100) and whether competition is Low, Medium, or High.

- Which 5 keywords from your list score 40–70 with Low or Medium competition? These are your priority targets for the first 5 videos.

- Search each of your 5 priority keywords on YouTube. Describe the top result: channel size, video age, and the biggest content gap you identified in that video that your version will fill.

Worksheet: Video Metadata Template (first 5 videos)

Complete all fields for each of your first 5 planned videos. Write the full description in a document editor first, then paste into YouTube Studio on upload day. Do not leave any field blank before upload.

Video 1 — Primary keyword

Video 1 — Title (under 60 characters, keyword front-loaded)

Video 1 — Description (first 100 characters including primary keyword)

Video 1 — Tags (list 8–12 tags: primary keyword, variations, category terms)

Video 1 — Chapter timestamps (format: 0:00 Introduction / 1:30 Section 1...)

Video 2 — Primary keyword

Video 2 — Title

Video 2 — Description (first 100 characters)

Video 2 — Tags

Video 2 — Chapter timestamps

Video 3 — Primary keyword

Video 3 — Title

Video 3 — Description (first 100 characters)

Video 3 — Tags

Video 3 — Chapter timestamps

Checklist: Pre-Upload SEO Checklist

- Primary keyword appears in the first 5 words of the title
- Title is under 60 characters (check on mobile to confirm no truncation)
- Description first 100 characters contain the primary keyword and a clear benefit statement
- Description body mentions the primary keyword 2–3 times naturally
- Description includes chapter timestamps for every major section
- 8–12 tags added: exact keyword phrase first, then variations and category terms
- Custom thumbnail uploaded (not auto-generated) at 1280×720 minimum
- End screen configured to recommend a related video and subscribe button
- At least one card link inserted at the key engagement point in the video
- Language and category correctly set in upload settings

Scripting and Video Production

Write your first full script using the HOOK–HOLD–CTA framework, establish a minimum viable production setup, and build a reusable editing workflow.

Exercise: First Full Script Draft

Write a complete script for your first planned video using the HOOK–HOLD–CTA framework. Aim for 1,200–1,400 words (approximately 10 minutes at 130 words per minute). Read every line aloud after writing it — if it feels unnatural to say, rewrite it. Time yourself recording the hook section to confirm it runs under 30 seconds.

- Write your Hook (0:00–0:30, approx. 75 words): open with the payoff or result, state the problem in the viewer's own language, and create one curiosity gap. Do NOT open with "Hey guys, welcome back."

- Outline your three Hold sections with a bullet-point breakdown of each section's key point, specific tactic or example, and named tool or framework. Convert one section to full script and read it aloud.

- Write your CTA (final 60 seconds, approx. 130 words): include a subscribe prompt tied to a specific benefit, a link to one related video on your channel, and one optional lead magnet or offer mention.

Worksheet: Production Setup Audit

Assess your current recording setup against each component. For gaps identified, note the specific action and estimated cost to address. Prioritise audio upgrades above all other investments.

Microphone: current setup (built-in / USB mic / XLR mic / phone mic with case) and audio quality self-rating 1–10

Microphone gap identified (if any) and recommended upgrade with price

Camera: current setup (smartphone model / webcam / dedicated camera) and video quality self-rating 1–10

Lighting: current setup (none / natural window light / ring light / softbox) and adequacy rating 1–10

Background: current setup and whether it is visually clean and branded

Room acoustics: echo level (none / mild / significant) and treatment applied or planned

Editing software: current tool and experience level (beginner / intermediate / advanced)

Thumbnail design tool and current template status (none / in progress / complete)

Checklist: Video Production Workflow Checklist

- Script fully written, read aloud, and timed to confirm target video length
- Thumbnail template open and ready to customise before recording (create thumbnail before editing, not after)
- Recording environment checked: microphone test recording reviewed, lighting confirmed, background tidy
- Script broken into note-card prompts or teleprompter format for natural delivery
- B-roll or screen recording segments identified in script and planned before recording session
- Recording session batched with at least one additional video to reduce setup overhead
- Edit completed: all pauses over 0.5 seconds cut, captions added, B-roll inserted every 60–90 seconds
- Chapter timestamps written and verified against final video edit
- Export settings confirmed: 1080p minimum, H.264 codec, 8 Mbps+ bitrate
- Thumbnail finalised with correct font size, contrast colour, and max 4 words of overlay text

Monetization and Channel Growth Systems

Activate your pre-YPP monetization stack, set up your weekly analytics review habit, and document the production systems that will let you scale output without burning out.

Exercise: Monetization Stack Mapping

Map out your monetization strategy across three time horizons: right now (before YPP), upon reaching 1,000 subscribers, and at 10,000 subscribers. For each revenue stream, identify the specific product or partner, the estimated revenue at that stage, and the one action required this week to activate or prepare it.

- List 2–3 affiliate programs relevant to your niche that you could join today (check Amazon Associates, ShareASale, Impact.com, or the direct affiliate programmes of tools you use). For each, state the commission rate and what product you would link to in your first 5 videos.
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• What is the simplest digital product you could create in under 5 hours that your ideal viewer would pay \$9–\$29 for? Describe it in one sentence. What platform would you use to sell it (Gumroad, Lemon Squeezy, or other)?

• Write a 3-sentence "work with me" or "hire me" pitch based on the expertise your channel demonstrates. Where will you link to it (description, pinned comment, channel banner)?

Worksheet: Weekly Analytics Review Sheet

Complete this sheet every Monday for the first 12 weeks. Fill in the actual metric values from YouTube Studio. The Trend column should note whether the metric improved, declined, or held flat versus the prior week. Leave the Benchmark columns blank — they are for your own reference targets, not pre-set values. Week number and date range

Total views (last 28 days)

Watch time in hours (last 28 days)

Average view duration in minutes

Impressions click-through rate %

New subscribers (last 28 days)

Subscriber conversion rate (new subs per 1,000 views)

Top performing video this week (title + view count)

Biggest audience retention drop-off point this week (video title + timestamp + cause)

One content or optimisation change to test next week based on this data

Checklist: Channel Growth Systems Activation Checklist

- Affiliate links set up for at least 2 relevant products and added to video description template
- Lead magnet created (checklist, template, or guide) and linked via a free tool such as Gumroad or ConvertKit
- Email list configured with a welcome sequence of at least 2 emails
- YouTube Channel page optimised: custom banner, channel description with keyword in first sentence, links to website and social
- Weekly analytics review scheduled as a recurring calendar event every Monday
- Analytics tracking spreadsheet created with the 6 core metrics and a row per week
- Community tab post published (activates at 500 subscribers — draft the first 4 posts in advance)
- Production system documented: topic pipeline, script template, thumbnail template, upload checklist all in one shared workspace
- Batch recording schedule confirmed in calendar for the next 3 sessions (4 videos per session)
- Repurposing workflow drafted: which platform receives each content format derived from a long-form video

Your Action Plan

1. This week: score your top 3 niche candidates using the viability scorecard and select one; write your channel positioning statement and test it with 2 real people
2. This week: install TubeBuddy or VidIQ free tier and build a 30-keyword bank; highlight the 5 priority keywords for your first 5 videos
3. This week: complete the Production Setup Audit worksheet; order any audio upgrade identified as a gap (prioritise microphone over camera)
4. This week: open a spreadsheet and create your thumbnail template in Canva, Adobe Express, or Photoshop — design one test thumbnail before recording your first video
5. Week 2: write your first complete script using HOOK–HOLD–CTA, read it aloud and time it, revise any section that feels unnatural
6. Week 2: record your first batch of 2–3 videos in a single session; write your metadata (title, description, tags, chapters) for each before editing
7. Week 2: join at least 2 affiliate programs and create your lead magnet digital product; add both links to your video description template
8. Week 3: publish your first video; schedule the weekly analytics review for every Monday at the same time
9. Week 4: review analytics for the first video; note the single biggest retention drop-off point and apply one specific fix in your next script
10. Month 2: publish your first Community tab post; begin testing 2 thumbnail variants per video and track CTR to identify your highest-performing design elements

