

Influencer & Creator Brand Deals — Workbook

This workbook gives you the exercises, worksheets, and checklists to implement every stage of the brand deal cycle — from building your media kit to closing renewals. Work through each section alongside the corresponding course module. By the end, you will have a live rate card, a signed contract template, and a complete post-campaign reporting system ready to use.

Positioning Yourself as a Brand Partner

Gather your metrics, build your media kit, and set a rate card you can defend with data.

Exercise: Metrics Audit

Pull the last 90 days of analytics from every platform you use. Calculate your engagement rate for each platform using the formula $ER = (\text{total engagements} / \text{total followers}) \times 100$. Then compare your results to the benchmark ranges in Lesson 1.

- What is your ER on your primary platform, and how does it compare to the niche benchmark? What does this tell you about your pitch positioning?

- Which of your last 10 posts generated the most meaningful audience comments (purchase intent, questions, or emotional responses)? What made those posts different?

- Are there audience demographic data points that would be especially compelling to a specific type of brand? List 2-3 brands where your demographics are a near-perfect match.

- What is the one metric you are most proud of, and the one you would not lead with in a pitch? How will you address the weaker number proactively?

Worksheet: Media Kit Data Sheet

Fill in every field below before opening Canva or your design tool. Having all data in one place prevents the common mistake of publishing a media kit with placeholder numbers.

Creator name / handle

Niche (2-4 words)

Bio (3 sentences: who, what, for whom)

Platform 1 name

Platform 1 follower/subscriber count

Platform 1 average reach per post

Platform 1 engagement rate (%)

Platform 2 name

Platform 2 follower/subscriber count

Platform 2 average reach per post

Platform 2 engagement rate (%)

Audience age distribution (e.g., 18-24: 22%, 25-34: 48%)

Audience top 3 countries and percentages

Audience gender split (%)

One compelling lifestyle/psychographic stat

Past brand partners (list names)

Best-performing post/video title and its stats

Second best-performing post/video title and its stats

Contact email for brand inquiries

Booking link or calendly URL

Checklist: Rate Card Launch Checklist

- Calculate your CPM floor for your primary platform using: $(\text{average reach} / 1,000) \times \text{niche CPM floor}$
- Set a flat rate for each deliverable type you offer (dedicated video, integration, story set, newsletter send)
- Add usage rights pricing as a named line item (6-month limited, 12-month limited, unlimited perpetual)
- Add a rush premium rate (20-30% surcharge for deliveries under 7 business days)
- Add an exclusivity pricing tier (standard 30-day window, extended 60-90 day window)
- Format your rate card as a one-page PDF matching your media kit visual style
- Test-send your rate card to a trusted peer creator and ask if the rates feel defensible
- Upload rate card to Google Drive with shareable link (never send as an email attachment)

Pitching and Outreach

Build a 20-brand prospect list, write your pitch template, and set up a follow-up system.

Worksheet: Brand Prospect Research Sheet

For each brand prospect you identify, fill in the fields below. Aim for 20 completed rows before sending your first outreach. Use Hunter.io for email verification and LinkedIn for contact role.

Brand name

Brand product or service (one line)

Why this brand fits your audience (one sentence)

Contact first name

Contact last name

Contact role/title

Contact email (verified via Hunter.io Y/N)

Alternative contact method (LinkedIn URL / IG DM handle)

Evidence of existing creator budget (competitor sponsorship / affiliate program / agency)

Proposed deliverable for this brand

Estimated rate for that deliverable

Outreach date

Follow-up 1 date (day 5)

Follow-up 2 date (day 12)

Status (Prospect / Outreach Sent / Follow-up 1 / Follow-up 2 / Reply Received / Call Booked / Deal Closed / Cold)

Exercise: Pitch Email Draft and Critique

Write your cold pitch email using the five-part structure from Lesson 5: specific hook, creator credential, audience fit proof, proposed deliverable, CTA. Then review it against the critique questions below before sending to any real prospect.

- Read your opening line aloud. Does it reference something specific about the brand, or could it be copied-pasted to any company? Rewrite it until it could only apply to this one brand.

- Count the sentences in your pitch. If it exceeds 150 words, identify which sentence can be cut without losing a key selling point.

- What is the single CTA at the close? Is it a low-friction ask (15-minute call or rate card) or a high-friction ask (sign a contract today)? Revise if needed.

- Read your pitch as if you are the brand manager receiving it. What is the first objection that comes to mind? Revise one line to pre-empt that objection.

Checklist: Outreach System Setup

- Install Mailtrack (free) or HubSpot Sales Free to track email open rates
- Create a Gmail or Outlook template folder with your pitch email and two follow-up variants
- Set calendar reminders for follow-up day 5 and day 12 at the moment you send each pitch
- Create a shared or private Google Sheet as your brand deal CRM with columns: brand, contact, status, fee, publish date, exclusivity end, last contact date
- Test your pitch email link to your media kit — confirm it opens correctly on mobile
- Send your pitch template to yourself first and read it on a phone screen to check formatting

Contracts and Negotiation

Acquire a contract template, map your non-negotiables, and practice negotiation scenarios.

Worksheet: Contract Terms Checklist

Before signing any brand deal contract, verify the presence and acceptability of each clause below. For each clause, mark whether it is present, acceptable, needs revision, or missing.

Scope of work — present (Y/N) / acceptable (Y/N) / notes

Total fee amount — stated clearly (Y/N)

Payment schedule — 50% upfront included (Y/N) / payment due date

Invoice or payment method specified

Publish date or date range — present (Y/N)

Revision rounds included — number stated

Usage rights — defined scope and duration

Usage rights — additional fee applied (Y/N) / amount

Exclusivity — competitor category defined narrowly (Y/N)

Exclusivity window — start date / end date

Exclusivity premium applied for windows over 30 days (Y/N) / amount added

FTC disclosure clause — present (Y/N)

Kill fee percentage — stated / under what conditions

Dispute resolution clause — jurisdiction specified

Governing law — state/province specified

Signatures required from both parties (Y/N)

Exercise: Negotiation Scenario Practice

Work through each scenario below and write your actual response — the words you would say or type. Treat this as rehearsal so you do not have to improvise under pressure during a real negotiation.

- Scenario: You quoted \$1,800 for a YouTube integration. The brand replies: "Our budget is \$900 — can you work with that?" Write your exact response (use scope-trading, not a rate cut).
- Scenario: A brand wants 90-day exclusivity in the "personal finance" category included at no extra charge. Write your counter-response that narrows the exclusivity definition and prices the window.
- Scenario: The brand wants usage rights to run your content as paid Meta ads for 6 months at no additional cost. Write your response including the rate add-on amount and rationale.
- Scenario: You have already delivered the content and published it. The brand emails saying they are cancelling the second payment due to "internal budget changes." Write your formal response referencing the contract.

Checklist: Contract Acquisition and Setup

- Acquire a creator-specific contract template (The Contract Shop, Kalli Collective, or Legal Zoom)
- Have the template reviewed by an attorney if you will use it for deals over \$5,000
- Set up a free HelloSign or DocuSign account for digital signature collection
- Create a contracts folder in Google Drive or Dropbox organized by year and brand
- Add your standard payment terms to your email signature or proposal template so brands see them before the contract stage
- Test the full contract send-and-sign flow with yourself as a test recipient before using with a real brand

Delivering and Renewing Brand Deals

Produce on-brief sponsored content, report campaign results, and pitch renewals with data.

Exercise: Ad Read Script Workshop

Write a full 60-second ad read for a fictional or real product you would genuinely recommend to your audience. Use the five-part structure: transition, personal hook, product benefits, social proof, CTA with promo code. Time yourself reading it aloud and refine until it sounds natural.

- Describe your transition sentence: how does the ad read connect to your video or podcast content on that day? Is the connection genuine or forced?

- What is the personal anecdote or use case you are using for the hook? Is it something your audience has seen you live out, or does it sound scripted?

- Say the CTA aloud three times. Is the promo code easy to remember and spell? Would a listener in the car be able to recall it 20 minutes later?

- Record yourself delivering the ad read and play it back. At which point does your voice sound least natural? Rewrite that section until delivery is fluid.

Worksheet: Post-Campaign Performance Report Template

After every sponsored post or campaign, fill in the fields below within 14 days of the publish date. Use these numbers to populate your client-facing PDF report.

Brand name

Campaign name or description

Content publish date(s)

Live content URL(s)

Deliverables completed (list each)

Total reach (platform-reported)

Total impressions

Total engagements (likes + comments + shares + saves)

Engagement rate for this campaign (%)

Your 90-day average ER for comparison (%)

Performance vs average (above/below by what %)

Link clicks (bio link or description URL)

Promo code redemptions (if shared by brand)

Top 3 audience comments referencing the product (quote them)

Content view or listen duration (if available)

What worked well (your qualitative assessment)

What to improve next time

Proposed next collaboration idea

Proposed next collaboration rate

Checklist: Renewal and Relationship Management

- Send post-campaign performance report within 14 days of content going live
- Include a specific renewal proposal in the same email as the performance report
- Update your pipeline CRM with final deal metrics, publish date, and renewal status
- Add the brand contact to a quarterly touchpoint calendar (send a relevant article or content update every 90 days)
- Review all active exclusivity windows — confirm no conflicts with upcoming prospect outreach
- Check if your monthly sponsored content ratio is under 25-30% of total output — if over, pause new deals until ratio rebalances
- If the brand renewed: negotiate a multi-campaign rate with a bundled package discount (10-15%) in exchange for 3-month commitment
- Archive the final contract, invoice, and performance report in your brand deal folder for tax and portfolio documentation

Your Action Plan

1. Pull 90 days of analytics from every platform and calculate your ER for each — do this before anything else, as all downstream pricing depends on it
2. Complete the Media Kit Data Sheet worksheet and build a one-to-two page PDF media kit in Canva using your existing brand colors
3. Build your rate card: CPM-floor calculation for primary platform, flat rates per deliverable, usage rights line items, rush and exclusivity premiums
4. Research 20 brand prospects using competitor sponsorship intelligence, affiliate program searches, and LinkedIn contact lookup — fill your CRM before sending a single email
5. Write and critique your pitch email template using the five-part structure; test on a trusted peer before real outreach
6. Acquire a creator contract template from The Contract Shop or Kalli Collective and set up a DocuSign account for signature collection
7. Work through all four negotiation scenarios in Section 3's exercise so you have rehearsed responses ready before your first live negotiation
8. Write and record a 60-second ad read script for your niche; use the recording to refine delivery before your first live sponsored integration

9. After your first published sponsorship, complete the Post-Campaign Performance Report worksheet and deliver a PDF report to the brand within 14 days
10. Pitch renewal in the same email as the performance report — include a specific content idea and an updated rate justified by campaign data

