

# Viral Marketing & Word-of-Mouth — Workbook

This workbook turns the course's frameworks into hands-on instruments for your own product or brand. Each section pairs with a course module and gives you exercises, worksheets, and checklists you complete using your real data, real customers, and real campaigns. Work through it sequentially for best results — each section builds on the one before.

## The Science of Spread

Establish your baseline viral metrics and identify which psychological sharing triggers are most relevant to your product.

### Exercise: Calculate Your Viral Coefficient

Pull 30 days of data from your analytics platform and work through the K-factor formula. Be honest with the numbers — a K below 0.1 is common and is a useful baseline, not a failure.

- What is your average number of invitations or shares sent per active user in the last 30 days? (Check referral link clicks, forward events, or social share button taps.)  
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- What percentage of people who received an invitation or saw a share actually signed up or converted?  
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- Calculate  $K = (\text{invitations per user}) \times (\text{conversion rate})$ . Write your K-factor here, then set a 90-day target K.  
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- Which of the three levers — breadth, message quality, or landing conversion — has the most room to improve? What is one specific change you could test this month?  
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### Worksheet: STEPPS Trigger Audit

For each of the six STEPPS triggers, score your product or brand's current activation strength from 1 (not present) to 5 (strongly activated). Then identify your top two and write one tactic to strengthen each. Social Currency score (1–5) and evidence

Triggers (environmental cue) score and evidence

Emotion score and primary emotion your product creates

Public visibility score and where your product is visible in the wild

Practical Value score and most-shared useful content or feature

Stories score and best customer story you currently use

Top two triggers selected for focus

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Tactic to strengthen Trigger 1

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Tactic to strengthen Trigger 2

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### Checklist: Viral Loop Identification Checklist

- Map every point in the user journey where another person sees, receives, or interacts with output from your user
- Classify each touchpoint as: inherent virality, incentivized referral, word-of-mouth pull, or content virality
- Identify whether each touchpoint currently has a share prompt or brand mark
- Select the highest-traffic touchpoint with no current share mechanism and flag it for immediate improvement
- Confirm your primary viral loop type and document it as the focus for this month's growth work
- Schedule a 1-hour mapping session with one product team member to validate your loop diagram

## Referral Loop Engineering

Design or redesign your referral program with dual-sided incentives, friction audit, and a documented testing plan.

### Exercise: Design Your Referral Offer

Before selecting an incentive, anchor the design in what your best users value most. Work through these prompts to arrive at a dual-sided offer that is product-aligned, not generic.

- List the three things your best users (highest retention, highest NPS) value most about your product. Be specific — 'saves time' is not specific; 'reduces the weekly reporting cycle from 4 hours to 20 minutes' is.

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- Which of those three things can you give more of as a referral reward? Write a draft referrer offer and a draft referee offer that both map to that value.

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- What is your estimated referral CAC at a 5% referral reach rate and a 25% invite-to-signup rate? Is the incentive cost justified at your current LTV?

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- Write the one-line referral message a user would see when they initiate a share. Make it include the specific value, the specific reward, and a sense of who benefits.

### Worksheet: Referral Friction Audit

Walk through your own referral flow as a first-time user and document every friction point. Rate each step from 1 (no friction) to 3 (significant barrier) and assign an owner and a resolution deadline.

Step 1 description and friction score

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Step 2 description and friction score

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Step 3 description and friction score

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Step 4 description and friction score

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Step 5 description and friction score

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Highest-friction step identified

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Root cause of highest friction

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Proposed fix for highest friction

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Owner responsible for the fix

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Deadline for fix implementation

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Total steps in current flow (target: 3 or fewer to share)

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### Checklist: Referral Program Launch Checklist

- Dual-sided incentive is product-aligned (not generic cash or gift card for a SaaS product)
- Referral share prompt appears at the peak-satisfaction moment, not in settings
- Dedicated referral landing page names the referrer and shows the offer above the fold
- Pre-written share message is provided — user can share in one click without writing their own
- Referrer sees a progress dashboard (invitations sent, conversions, reward status)
- Reward fulfillment happens within 24 hours of qualifying event (not days or weeks)
- UTM parameters are set on all referral links for accurate attribution
- Experiment log is created with baseline K-factor and target K-factor recorded

## Word-of-Mouth Seeding and Community Amplification

Build your node map, identify micro-influencer candidates, and design your first evangelist program.

### Exercise: Build Your Network Node Map

Identify your top connectors, mavens, and salespeople in your existing audience using the behavioral signals covered in the course. This exercise produces a seeding shortlist you can act on this week.

- Export your email list sorted by engagement score. Who are the top 20 users by: (a) emails opened and replied to, (b) reviews or testimonials written, (c) referrals made without prompting? List their names and engagement signal.
- Cross-reference that list with any community platforms (Slack, Discord, Reddit, LinkedIn groups related to your niche). Who from your list is also active there?
- For the top five names on your combined list, write one sentence about what makes each person credible to their peers in your niche. This becomes your outreach rationale.
- Draft a three-sentence outreach email to your top node: explain why you chose them specifically, what you are offering (early access, direct team line, co-creation), and one concrete ask.

### Worksheet: Micro-Influencer Evaluation Scorecard

Use this scorecard to evaluate each micro-influencer candidate against the four fit filters. Score each filter 1–3. Total score guides selection priority.

Creator handle / name

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Platform and follower count

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Audience fit score (1–3) and basis for score

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Content authenticity score (1–3) and notes

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Engagement rate (calculated) and quality score (1–3)

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Category authority score (1–3) and topic evidence

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Total fit score (sum of four filters)

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Proposed offer for this creator (free product / access / commission)

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Primary call to action for this activation

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UTM link or promo code to assign

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### Checklist: Evangelist Program Launch Checklist

- Top 10 vocal users identified by name and contact
- Program name chosen (Ambassadors, Champions, Insiders, or custom)
- Private community space created (Slack channel, Discord, or equivalent)
- Personal invitation drafted and sent — not a mass email, individual outreach
- Early feature access mechanism is in place before first group call
- One specific ask per quarter defined and communicated to the group
- Recognition mechanism planned (public shout-out, case study, spotlight post)
- Quarterly review date scheduled to assess ambassador program impact on referrals and NPS

## Building Shareable Moments and Running the 90-Day Experiment

Engineer at least one shareable product moment and design your full 90-day viral growth experiment plan.

### Exercise: Find and Design Your Shareable Product Moment

Use user interview data or behavioral analytics to locate the peak experience in your product, then design the share prompt that converts that moment into word-of-mouth.

- List three moments in your product where users feel the strongest positive emotion. For each one, describe what just happened in the product and what the user typically does next.

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- For your top moment, describe what a sharable artifact would look like: a card, a link with a preview, a downloadable image, a pre-written post. What information would it include? What would the recipient see?

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- Write the share prompt copy that appears at that moment. It should be 15 words or fewer, feel natural (not like an ad), and make sharing feel socially positive for the user.

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- How will you track shares from this moment? Describe the UTM structure or share-event tracking you will implement.
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### Worksheet: 90-Day Viral Growth Experiment Plan

Complete this plan before beginning your experiment. Share it with at least one colleague to stress-test your assumptions. Every field should be filled before launch.

Experiment name

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Viral mechanism chosen (referral / shareable moment / influencer seed / content virality)

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Hypothesis: if we [do X], then [metric Y] will increase from [baseline] to [target] in [timeframe]

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Primary success metric and current baseline value

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Target value for primary metric at Day 90

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Minimum viable version description (what is the simplest version you can test?)

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Phase 1 (Days 1–30): actions and owner

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Phase 2 (Days 31–60): first A/B test variable and hypothesis

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Phase 3 (Days 61–90): scale criteria and documentation plan

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Review dates: Day 30 check-in, Day 60 pivot decision, Day 90 results read-out

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Tracking setup: UTM structure, dashboard link, alert threshold

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Failure criteria: if this metric is below X at Day 45, we pivot

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### Checklist: Content Shareability Audit Checklist

- Every content piece published this month is tagged with its primary STEPPS trigger before publication
- At least one piece per month includes original data or proprietary research your audience cannot find elsewhere
- Every long-form piece includes at least one shareable artifact: a named framework, a visual, a template, or a quotable statistic
- Headlines are reviewed against the specificity checklist: number, insight signal, personal relevance, or social proof anchor
- Share prompts appear inside content at the moment of peak value delivery (not just at the end)
- All shared links are UTM-tagged and source attribution is verified in your analytics dashboard
- Content experiment log is updated after each publish with share rate and referral conversion data

### Your Action Plan

1. Calculate your current K-factor this week using 30 days of referral and share data; record the baseline before making any changes
2. Complete the STEPPS Trigger Audit and choose two triggers to engineer into your next content piece or product feature
3. Run a friction audit on your current referral flow by walking through it yourself as a new user; count every step and identify the single biggest barrier
4. Identify your top 10 vocal users by engagement signal and referral history; draft personalized outreach to the top five this week
5. Evaluate three to five micro-influencer candidates using the scorecard; activate the top two with

free access and a one-page product truth document (not a script)

6. Map your product's use flow and mark every point where another person sees or receives output from your user; flag the highest-traffic unmarked point as your next share-prompt sprint

7. Design one shareable product moment: identify the peak experience, draft the share prompt copy, define the shareable artifact, and set up UTM tracking

8. Build your 90-day viral growth experiment plan in the worksheet; choose one mechanism, define the hypothesis, set the baseline and target, and calendar the three review dates

9. Launch your minimum viable experiment to 20 percent of your user base in Week 3 and schedule your first data review for Day 14

10. Complete your experiment log entry at Day 90: actual vs. target K-factor, what you learned, the next experiment queued, and the referral program or viral mechanic you are committing to long-term











