

# Influencer Marketing for Brands — Workbook

This workbook turns the course into a working influencer program you can run. Each section mirrors a course module with exercises, fill-in worksheets, and checklists, and the templates give you reusable trackers for sourcing, ROI, and creator briefs. Work through it in order and you will finish with a vetted shortlist, signed-deal terms, and an ROI dashboard.

## Strategy and the Influencer Landscape

Lock your objective, platform, creator tier, budget split, and target benchmarks before contacting anyone.

### Exercise: Define Your One Campaign Objective

Pick a single primary objective for your next campaign and reason it all the way through to the metric you will be judged on. Avoid choosing more than one primary goal.

- What is the one primary objective: awareness, engagement, traffic, conversions, or content generation?  
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- Which platform best fits that objective and where your buyers actually spend time, and why?  
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- Which creator tier fits the goal and budget, and what is the trade-off you are accepting?  
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- What single headline metric will define success for this campaign?  
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### Worksheet: Budget Allocation Planner

Fill in each field to split your total program budget across fees, amplification, seeding, and contingency. Confirm the parts add up to the total.

Total program budget  
\_\_\_\_\_

Paid amplification reserve (10 to 20 percent)  
\_\_\_\_\_

Product seeding and shipping reserve (5 to 10 percent)  
\_\_\_\_\_

Creator fees pool (remainder)  
\_\_\_\_\_

Fee split across tiers (nano / micro / mid / macro)  
\_\_\_\_\_

Contingency reserve (about 10 percent)  
\_\_\_\_\_

Number of creators this funds  
\_\_\_\_\_  
\_\_\_\_\_

## Checklist: Pre-Launch Strategy Checklist

- Primary objective named and written down
- Target audience defined by age, gender, and location
- Platform chosen to match audience and content type
- Creator tier and rough rate range identified
- Budget split across fees, amplification, seeding, and contingency
- Target benchmarks set for engagement rate, CPE, and ROAS

## Finding and Vetting Creators

Source a wide candidate list, vet for authentic reach and brand fit, and screen out follower fraud.

### Exercise: Calculate and Judge Engagement Rate

Choose three candidate creators. For a recent post on each, gather the numbers and compute engagement rate using likes plus comments plus saves and shares, divided by followers, times 100. Then judge each against the benchmark for its tier.

- For each creator, what are the followers, likes, comments, and saves on a recent post?

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• What engagement rate does each creator produce, shown as a percentage?

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• How does each rate compare to the benchmark for its tier and platform?

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• Which candidates pass this first filter and move to full vetting?

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### Worksheet: Creator Vetting Scorecard

Complete one scorecard per shortlisted creator. Rate each factor and write a short note, then give an overall go or no-go decision.

Creator handle and platform

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Follower count and tier

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Engagement rate vs benchmark

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Audience demographics match (yes / partial / no)

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Comment quality (real conversation / generic / spammy)

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Brand-safety and recent-controversy check

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Estimated fake-follower percentage from audit

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Overall decision (go / hold / no-go)

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### Checklist: Fake-Follower Red-Flag Checklist

- Engagement rate is wildly out of line with follower count
- Comments are mostly generic, one-word, or single-emoji
- Follower growth shows sudden vertical spikes, not a smooth curve
- Audience is concentrated in countries unrelated to the creator's market

- [ ] High follower count but very few likes, saves, or shares
- [ ] Creator declined to share native analytics screenshots
- [ ] Audit tool flags fake-follower share above 20 to 25 percent

## Outreach, Negotiation, and Contracts

Reach out professionally, negotiate scope and rights, and lock an FTC-compliant written deal.

### Exercise: Draft a Personalized Outreach Message

Write a complete outreach message to a real shortlisted creator using the five-part structure from the course. Keep it short and specific.

- Which specific recent post will you reference as your personal hook?

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• In one line, who are you and why does your brand fit this creator's audience?

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• What is the offer, and how will you signal that it is paid?

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• What is the low-friction next step you will ask for, and what is the deadline?

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### Worksheet: Deal Terms Negotiation Sheet

Use this sheet to plan and record the terms of a single deal before you sign. Price each lever separately so the total is transparent.

Creator handle and quoted base rate

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Deliverables (posts, Stories, formats, counts)

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Usage rights term and uplift amount

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Exclusivity or non-compete period and premium

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Whitelisting or partnership-ad rights (yes / no / price)

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Payment schedule (for example 50 percent up front)

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Total agreed fee

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### Checklist: Contract and FTC Compliance Checklist

- [ ] Scope of work spells out exact deliverables, platforms, and counts
- [ ] Timeline covers draft dates, go-live date, and how long content stays up
- [ ] Compensation and payment schedule are stated
- [ ] Usage and licensing rights are defined by channel and duration
- [ ] Exclusivity and non-compete terms are included or noted as none
- [ ] FTC disclosure is a contractual obligation with exact wording supplied
- [ ] Approval process, revision limit, and non-performance clause are present

## Campaign Execution and Measuring ROI

Brief creators, launch with full tracking, and report defensible ROI to decide what to scale.

### Exercise: Compute Your Campaign ROI

Using a real or planned deal, work through the core metrics. Show the math for each so the result is defensible to a stakeholder.

- Given spend and impressions, what is the CPM?

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- Given spend and total engagements, what is the CPE?

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- Given attributed orders and average order value, what is the attributed revenue?

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- What are the resulting ROAS and ROI percentage, and is the creator above your benchmark?

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### Worksheet: Attribution Setup Worksheet

Complete this for each creator before launch so every result is trackable. Use a consistent UTM convention across all creators.

Creator handle

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UTM source / medium / campaign values

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Final tracking link

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Unique promo or discount code

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Affiliate link and commission rate (if any)

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Platform-native tracking used (link sticker, Spark Ads, insights)

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### Checklist: Go-Live Day Checklist

- Draft caption and concept approved with disclosure included
- Correct tracking link and promo code are in the post
- Post is published at the agreed date and time
- Disclosure is clear, conspicuous, and placed up front
- Paid Partnership or platform ad label is enabled where required
- Brand account is engaging with early comments
- Live post screenshot saved for records

## Your Action Plan

1. Write down one primary objective and the single metric you will report on.
2. Choose the platform and creator tier that fit your audience and goal.
3. Set your total budget and split it across fees, amplification, seeding, and contingency.
4. Source 50 to 100 candidate creators into the discovery tracker.
5. Vet each shortlisted creator with the scorecard and run fraud checks, keeping 10 to 20.
6. Send personalized outreach and follow up once after five to seven days.
7. Negotiate deliverables, usage rights, and exclusivity, then sign a written contract with an FTC disclosure clause.
8. Brief each creator and set up UTM links and unique promo codes before launch.

9. Launch, verify disclosures and tracking on go-live day, and engage with comments.
10. Calculate CPM, CPE, ROAS, and ROI, then scale winners, renegotiate the middle, and cut the bottom.









