

# UGC & Creator Marketing — Workbook

This workbook turns the course into a working system you can run this month. Each section maps to a course module and moves you from deciding which collaboration model fits, through briefing and sourcing creators, locking down licensing, and finally testing and benchmarking the content in paid. Fill it in as you commission your first batch, and the templates at the end will track every creator, licence, and test result in one place.

## Choosing your model

Pin every creator spend to a named goal and pick the collaboration model that serves it most cheaply.

### Exercise: Name the goal before the tactic

Pick one real objective you have for the next 60 days. Work through the prompts in order, and only at the end name the collaboration model. If you cannot answer the first prompt in one sentence, you are not ready to spend.

- What is the single business outcome you want, stated in one sentence (for example more profitable Meta ads, direct sales on a tight budget, or awareness with a specific local audience)?

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- Are you primarily buying footage you control, performance tracked by code or link, or access to a creator's audience?

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- Given that answer, which model fits: UGC creators, an affiliate or ambassador program, or creator collaborations with usage rights?

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- What is the cheapest version of that model that could still hit the goal, and what does it cost?

### Worksheet: Model decision sheet

Complete one row per goal you are considering this quarter. Leave the recommended budget split as a number you decide, not a formula, and revisit it after your first batch.

Goal (one sentence)

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What you are buying (footage / performance / reach)

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Chosen model (UGC / affiliate / collaboration)

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Why this model beats the alternatives

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Target cost per result or KPI

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Planned budget for this goal

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Success looks like (specific number)

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### Checklist: Before you commit a single dollar

- The goal is written in one sentence and is a business outcome, not an activity
- You can state whether you are buying footage, performance, or reach
- The chosen model is the cheapest one that still serves the goal
- You have not defaulted to influencer marketing just because it is the familiar tactic
- A target KPI or cost-per-result number is set so you can judge the spend later

### Briefing and sourcing creators

Write briefs that return usable footage and source a first batch through marketplaces, search, and outreach.

### Worksheet: Seven-section creator brief

Fill every field before sending the brief to any creator. The do-not list and raw-footage request are not optional. Reuse this filled sheet as the template you paste to each creator, adjusting only the hook and talking points.

Objective and where it runs (e.g. paid Meta ad to first-time buyers)

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Hook option 1 (exact opening line)

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Hook option 2 (exact opening line)

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Hook option 3 (exact opening line)

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Core message / single claim to land

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Proof to show on camera

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Shot list (specific moments needed)

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Talking points in creator's own words (not a script)

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Technical specs (9 by 16, lighting, captions, min length)

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Do-not list (claims, competitors, words to avoid)

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Raw uncaptioned footage requested (yes/no)

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### Exercise: Source three creators per route

Spend 30 minutes building a shortlist across all three sourcing routes in parallel. For each candidate, watch two or three of their existing videos before adding them. Capture answers to the prompts for at least nine creators total.

- Which marketplace candidates did you find (Billo, Insense, or TikTok Creator Marketplace) and at what quoted rate?

- Which creators surfaced from hashtag and content search in your niche, and what makes their style a fit?
- Which of your own happy customers or small creators already mention you and could be paid to create?
- For each candidate: can they hold attention in the first two seconds, is delivery natural, and is lighting and audio acceptable?

### Checklist: Ready-to-commission gate

- The brief has all seven sections filled, including hooks and a do-not list
- Raw uncaptioned footage is explicitly requested alongside any edit
- You are commissioning five to ten videos, not one or two, so you can test
- Each shortlisted creator was vetted on two to three existing videos, not on follower count
- Per-video budget including basic paid usage rights is set (target 150 to 250 US dollars)
- A backup creator is lined up for each route in case someone goes quiet

## Licensing, rights, and relationships

Lock down the four licensing terms, set up whitelisting, and keep every deal compliant and re-bookable.

### Worksheet: Usage rights term sheet

Complete one per creator agreement and keep it with the signed licence. If any of the four core terms is blank, you do not yet have the right to run the content as a paid ad. Record the expiry date prominently so it does not lapse mid-campaign.

Creator name and handle

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Scope of use (organic only / paid ads too)

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Duration (3 / 6 / 12 months / perpetuity)

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Platforms and territories (e.g. Meta and TikTok ads worldwide)

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Exclusivity (none / named competitors / period)

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Whitelisting granted (Meta Partnership Ads / TikTok Spark / none)

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Right to edit and re-cut (yes/no)

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Licence start date

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Licence expiry date

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Renewal or extension fee agreed

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### Exercise: Set up one whitelisting permission

Pick your single best creator and arrange creator-account ads end to end, then write down each step so the next one is faster. Treat whitelisting access as separate from the content licence.

- On which platform are you whitelisting, Meta Partnership Ads or TikTok Spark Ads, and why?  
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- What exact step does the creator take to grant access (partnership tools permission, or generating a Spark code for the specific video)?  
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- What end date did you set so creator-account access matches the usage-rights expiry?  
\_\_\_\_\_
- How will you keep the original post's likes and comments as social proof when boosting?  
\_\_\_\_\_

### Checklist: Compliance and relationship guardrails

- Every paid or gifted collaboration uses a clear label (hashtag ad or paid partnership), not buried hashtags
- Disclosure is required in both the brief and the contract
- Free product is disclosed too, not just cash deals
- All four licence terms (scope, duration, platforms, exclusivity) are on paper before any ad runs
- Every licence expiry is diarised with a renew-or-pause reminder
- Top-performing creators are flagged for re-booking with their best video noted

## Deploying and benchmarking

Run structured creative tests, read the three metrics that matter, and benchmark UGC against studio work monthly.

### Exercise: Design one clean creative test

Set up a single test that isolates one variable. Decide the variable, the variations, and the stop rule before you launch, then commit to letting it run to a fair sample before judging.

- Which one variable are you isolating first (hook, angle, creator, or format) and why that one?  
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- What are the specific variations, and what is held identical across them?  
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- What budget and impression or time threshold will each creative reach before you judge it (e.g. 1,000 to 2,000 impressions or its cost target)?  
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- Where will you log the test so this round's learning feeds the next brief?  
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### Worksheet: Creative scorecard

Record results per video after the test reaches a fair sample. Read thumbstop, then hold, then cost per result, and write the diagnosis in plain words. Leave any calculated fields blank for you to fill from your ads manager; do not estimate.

Video / creator

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Variable tested (hook / angle / creator / format)

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Spend

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Impressions

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Thumbstop rate (3-sec plays / impressions)

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Hold rate (deep views / impressions)

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Cost per result

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Diagnosis (hook / body / offer or page issue)

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Decision (scale / iterate / retire)

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### Checklist: Monthly engine cadence

- A fresh batch of five to ten UGC videos is briefed and booked from your roster plus a couple of new creators
- New creative is tested against your current best performers and a studio control
- Thumbstop, hold, and cost per result are pulled and compared to last month's winners
- Winners get more budget and fatigued creative is paused
- Every learning is written back into the next round of briefs
- Each creative was judged only after a fair sample, never killed after a few hours

### Your Action Plan

1. Write the one-sentence goal for your next 60 days and choose the collaboration model that serves it most cheaply
2. Complete the seven-section brief in full, including three hook options, a do-not list, and a raw-footage request
3. Source nine creators across marketplaces, hashtag search, and your own customers, vetting each on two to three existing videos
4. Book a first batch of five to ten videos at 150 to 250 US dollars each including basic paid usage rights
5. Set up the creator tracker and move every commission through the six stages, planning the timeline backwards from go-live with a buffer
6. Sign a licence for each creator covering scope, duration, platforms, and exclusivity, and diarise every expiry
7. Arrange whitelisting on your single best creator via Meta Partnership Ads or TikTok Spark Ads with an end date matching the licence
8. Launch one structured test that isolates a single variable, and let each creative reach a fair sample before judging
9. Score every video on thumbstop, hold, and cost per result, and benchmark against a studio control
10. Scale the winners, retire fatigued creative, and feed the learnings into next month's briefs to repeat the loop









