

Patreon & Creator Membership Monetization — Workbook

This workbook guides you through the key decisions and actions required to launch and grow a Patreon membership. Complete each section alongside the corresponding course module to build your membership page, content calendar, and growth system in real time. Every exercise is designed to produce a deliverable you can use immediately — not just notes.

Membership Strategy and Tier Design

Research your niche, set your MRR target, and design your three-tier benefit stack before building your Patreon page.

Exercise: Audience Conversion Math Exercise

Use your actual follower counts and estimated engagement levels to calculate a realistic 90-day patron target and monthly MRR goal before you launch.

- List each platform where you have an audience, your follower count, and your estimated engagement rate (high = 3%+ comments/shares per post; medium = 1–3%; low = under 1%).

- Apply the conversion rate to each platform: high engagement \times 2%, medium \times 1%, low \times 0.3%. Sum the results. This is your realistic first-90-day patron estimate.

- Multiply your patron estimate by your planned average tier price. Is this MRR target meaningful to you? If not, what audience size or price point would make it meaningful?

- Identify your single highest-engagement platform. This is where your launch announcement should land first.

Worksheet: Competitor Tier Research Worksheet

Visit 8–10 Patreon pages in your niche using Graphtheon.com and Patreon Explore. Record the data below to inform your own pricing and benefit design.

Creator name / Patreon URL

Niche / content category

Tier 1 name and price (\$)

Tier 1 benefits (list)

Tier 1 patron count (if shown)

Tier 2 name and price (\$)

Tier 2 benefits (list)

Tier 2 patron count (if shown)

Tier 3 name and price (\$)

Tier 3 benefits (list)

Estimated monthly MRR (from Graphtron)

Notes: What makes this page strong or weak?

Checklist: Tier Design Launch Readiness Checklist

- Researched at least 8 competitor Patreon pages in my niche
- Identified the most-populated price tier across competitors
- Set Tier 1 price at \$5 or higher with one specific, time-bound benefit
- Set Tier 2 price at \$10–\$15 with Tier 1 benefits plus one exclusive format
- Set Tier 3 price at \$25–\$50 with a seat cap of 20–30 and high-touch access
- Written each tier description using the 'specific benefit + delivery cadence + emotional payoff' formula
- Confirmed that every tier benefit is deliverable on a consistent schedule

Exclusive Content Systems

Build your 90-day exclusive content calendar, production workflow, and patron onboarding sequence before your first exclusive post goes live.

Worksheet: 90-Day Exclusive Content Calendar

Map your three exclusive content formats to specific weeks across months 1–3. Fill in every row before you launch so your production schedule is locked.

Month

Week number (1–4)

Post type (Early Access / Behind-the-Scenes / Q&A / Other)

Content title or topic

Production date (when you will create it)

Scheduled publish date on Patreon

Tier access (All patrons / Tier 2+ / Tier 3 only)

Status (Planned / In Production / Scheduled / Published)

Exercise: Welcome Message and Onboarding Copy Exercise

Write your Patreon welcome message and Start Here pinned post before your launch day. Both should be live on day one.

- Draft your welcome message using the five-line framework: (1) personal thanks with name variable, (2) benefit confirmation with specific cadence, (3) immediate action with a link to your best existing exclusive post, (4) Discord invitation, (5) direct personal close.
- List the five best existing exclusive posts (or posts you will create before launch) that belong in your Start Here pinned post. For each, write one sentence summarising why a new patron should read or watch it first.
- Write the headline for your Start Here pinned post. It should communicate orientation, not just welcome — something like 'New here? Everything you need in one place.'

Checklist: Pre-Launch Content Readiness Checklist

- 90-day calendar filled with at least 12 scheduled posts across 3 months
- At least 3 exclusive posts created and ready to publish on launch day
- Behind-the-scenes video template (intro graphic, music, end card) created in video editor
- Q&A collection post template written and ready to publish on month 1 day 1
- Welcome message written and entered in Patreon Settings > Creator tools > Welcome message
- Start Here pinned post created with links to at least 3 exclusive posts
- Batch production day blocked in calendar for months 1, 2, and 3
- Emergency 'missed post' text template drafted and saved

Audience Conversion and Promotion

Write your launch announcement copy, map your cross-platform promotion plan, and build the email funnel integration before your public launch date.

Exercise: Launch Announcement Copy Exercise

Write the five pieces of launch copy you will need: the soft-launch email, the public announcement post, the social media caption, the YouTube mid-roll script, and the follow-up social proof post.

- Write your soft-launch email (Day -2) using the Story frame: why you are starting the membership, what problem it solves for your most engaged fans, and a single CTA with the early access link. Target 200–300 words.
- Write your public announcement social post (Day 0) in the format that fits your primary platform (thread, caption, or community post). Include: what the membership is, one specific tier benefit, and the founding-patron incentive. Under 150 words.
- Write your YouTube mid-roll script (20–30 seconds) mentioning one specific Tier 2 benefit and the Patreon URL. Read it aloud — it should not sound like an ad.
- Draft your Day 5 social proof follow-up post: number of founding patrons, a quote or paraphrase from one patron about why they joined, and a final CTA with the founding-patron deadline.

Worksheet: Cross-Platform Promotion Plan

Map every promotion action you will take across your platforms during the 7-day launch window and the ongoing evergreen promotion schedule.

Platform

Audience size

Estimated conversion rate (%)

Estimated patrons from this platform

Launch week action (e.g., pinned post, mid-roll mention, email blast)

Evergreen ongoing action (e.g., end-screen, newsletter footer, monthly community post)

Link or CTA format used on this platform

Date of first promotion action

Checklist: Launch Week Promotion Checklist

- Soft-launch email sent to email list 48 hours before public announcement
- Public announcement posted simultaneously across all active platforms
- Patreon link added to every platform bio and link-in-bio page
- YouTube end screen updated to include Patreon CTA card
- Pinned comment with Patreon link added to the 3 most recent YouTube videos
- Patreon link added as the first link in YouTube video descriptions on all recent videos
- Newsletter footer updated with current patron count and Patreon link
- Follow-up social proof post published on Day 5 with founding patron count

Retention, Analytics, and Growth

Set up your monthly analytics review process, build your churn response playbook, and plan your first tier upgrade campaign.

Worksheet: Monthly Analytics Review Worksheet

Fill in this worksheet at the end of each month to track your four core Patreon metrics and identify the one growth or retention action you will take next month.

Month

MRR this month (\$)

MRR last month (\$)

MRR change (\$)

Total active patrons

New patrons this month

Cancelled patrons this month

Net new patrons

Churn rate this month (cancelled / start-of-month patrons × 100)

Most common cancellation reason (from survey or DM feedback)

Patrons on annual plan

Average patron lifespan (months)

One action to take next month based on this data

Exercise: Churn Response Playbook Exercise

Build a simple decision tree for responding to each type of patron churn so you have a ready response for every cancellation scenario.

- Month-1 churn: What will you change in your onboarding sequence if more than 15% of new patrons cancel within 30 days? Write a specific action (e.g., 'I will add a Day 3 DM check-in to all new patrons' or 'I will create a second Start Here post for Tier 2 specific to their benefits').
 - Consistent month-3 churn: What content quality or delivery issue would you investigate first? Write 2–3 hypotheses and the data you would look at to test each one.
 - Failed payment churn: Write the exact DM you will send to patrons with failed charges. Keep it under 50 words, warm, and action-focused with a link to update their payment method.
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Checklist: Month-3 Growth and Retention Checklist

- Completed monthly analytics review for months 1, 2, and 3
- Exported patron history CSV and calculated average patron lifespan
- Sent personal DM to at least 5 silent patrons (no engagement in 30+ days)
- Posted at least one patron poll in month 2 or 3
- Delivered monthly Q&A on schedule in all three months
- Monitored failed payment dashboard and sent outreach to all failed-charge patrons
- Enabled annual billing in Patreon settings
- Promoted annual billing option to existing patron base at least once
- Identified 5–10 Tier-1 patrons who have been members for 3+ months as upgrade candidates
- Drafted tier upgrade campaign DM and exclusive preview post for month 4

Your Action Plan

1. Complete the Competitor Tier Research Worksheet with data from at least 8 Patreon pages in your niche before setting any prices
2. Calculate your realistic 90-day patron target using the Audience Conversion Math Exercise and use this number as your launch goal
3. Design your 3-tier structure using the Supporter-Insider-Partner framework with benefits written to the specificity test standard
4. Create at least 3 exclusive posts before your launch date so new patrons have content to engage with immediately
5. Write and enter your Patreon welcome message and create your Start Here pinned post before the launch day

6. Fill in your 90-day content calendar and block all production days in your calendar before going public
7. Execute the 5-step launch sequence: soft launch (Day -2), community post (Day -1), public announcement (Day 0), follow-up (Day 3), final CTA (Day 7)
8. Set up your Discord server with the Patreon integration and at least three channels before your first patron joins
9. Conduct your first monthly analytics review at day 30 and identify one specific retention action to take in month 2
10. Run your first tier upgrade campaign at month 4 by selecting long-tenured Tier-1 patrons and creating a Tier-2 preview post

