

# UGC (User-Generated Content) Creator Business — Workbook

This workbook accompanies each module of the UGC Creator Business course with exercises, worksheets, and checklists you complete as you go. Work through each section after its corresponding module to lock in the concepts and take concrete action steps. By the end, you will have a portfolio, an outreach system, a filming checklist, and a client management workflow ready to use.

## Positioning, Portfolio, and Finding Your Niche

Define your UGC niche, audit your filming environment, and plan your portfolio page before building it.

### Exercise: Niche Selection Decision Exercise

Answer each prompt in writing before scoring your top two niche candidates. This structured reflection prevents choosing a niche based on trend rather than fit.

- List every product category you currently buy, use, or have genuine experience with — minimum 8 categories.
- For each category, rate your filming environment fit on a scale of 1–3: 1 = I have no relevant props or settings, 2 = I have some relevant context, 3 = I have a natural, authentic setting for this category.
- Check Billo and Insense today and count the number of active briefs in each of your top three categories. Record the brief count.
- Based on environment fit AND brief count, which one or two niches have the highest combined score? Write your niche statement: 'I create UGC video ads for [category] brands targeting [audience].'

### Worksheet: Portfolio Planning Worksheet

Fill in each field before building your portfolio page. This ensures your page answers the three questions brands ask in under 60 seconds.

Niche statement (one line, e.g. 'UGC video ads for health supplement brands')

---

Primary deliverable format (vertical 9:16 / horizontal 16:9 / both)

---

3 product ideas for spec ads (products you already own or will buy for under \$25 each)

---

Portfolio platform chosen (Stan.store / Notion / Beacons.ai / other)

---

Starting rate anchor to display ('Starting from \$\_\_\_')

---

Preferred contact method (email address / booking link URL)

---

Portfolio page URL once live

---

---

### Checklist: Portfolio Launch Checklist

- Choose one portfolio platform and create an account
- Film at least 3 spec ads following the hook-body-CTA structure (products you own)
- Edit all 3 spec ads to under 60 seconds with captions
- Upload videos to portfolio page with descriptive titles
- Add your niche statement as the page headline
- Add a 'Starting from \$\_\_\_' pricing anchor
- Add your email address or booking link prominently
- View your portfolio on mobile to confirm it loads correctly
- Send the portfolio link to one trusted person and ask: 'Does this clearly tell you what I do and how to hire me?'

## Outreach, Pitching, and Closing Brand Contracts

Build a targeted outreach list, draft your pitch template, and set up the contract and payment process before your first send.

### Worksheet: Brand Outreach Target List Worksheet

Complete this worksheet to build your first 20-brand outreach list using the Meta Ad Library and LinkedIn. Populate every row before sending a single pitch.

Brand name

---

Product / product line targeted

---

Outreach channel (email / Instagram DM / LinkedIn)

---

Contact name (if found)

---

Contact email or profile URL

---

Signal observed (e.g. '7 active Meta ads in skincare category')

---

Date pitched

---

Follow-up date (Day 5)

---

Response received (yes / no / pending)

---

Outcome (booked / declined / no response)

---

---

## Exercise: Pitch Drafting Exercise

Use the 4-line pitch structure to write three customized pitch versions before sending any outreach. Writing multiple versions helps you internalize the structure and identify which approach fits different brand types.

- Write a cold email pitch for a mid-size DTC supplement brand you identified in the Meta Ad Library. Use the 4-line structure: context, credibility, offer, CTA. Keep it under 120 words.

---

- Rewrite the same pitch as an Instagram DM under 5 lines for a smaller brand where the founder likely monitors the account.

---

- Write a LinkedIn message pitch targeting an agency creative strategist. Lead with your understanding of their client type rather than your own background.

## Checklist: Contract and Payment Setup Checklist

- Choose a contract tool (Dubsado free trial / HoneyBook / Google Doc template)
- Add deliverable description, quantity, and timeline fields to your contract
- Set usage rights scope: platform, duration, paid vs. organic, exclusivity terms
- Define revision policy: two rounds included, additional rounds billed separately
- Set deposit amount: 50% due before filming
- Set final payment terms: balance due on file delivery
- Add late payment clause: 1.5% monthly interest after 14 days
- Add clause: usage rights transfer only upon receipt of full payment
- Set up a payment method (PayPal, Stripe, Wise, or e-transfer depending on client location)
- Send your contract template to yourself and review it as a client would

## Filming and Editing Professional UGC Ads

Prepare your filming environment, plan your ad scripts, and set up your editing workflow before your first paid brief.

### Exercise: Hook Writing Practice

Write hooks for an imaginary product in your chosen niche using all four hook categories. This builds your hook library you can adapt for real briefs.

- Choose a product in your niche. Write a problem-first hook (name a specific pain point in one sentence, under 8 seconds spoken aloud).

---

- Write a result-first hook for the same product (lead with a specific, believable outcome).

---

- Write a curiosity-gap hook for the same product (subvert an expectation or make a counterintuitive claim).

---

- Film yourself delivering all three hooks on your phone. Watch back with headphones. Which sounds most natural and credible? Note why.

## Worksheet: Filming Environment Audit Worksheet

Walk through every room or outdoor space available to you and rate each for lighting, audio, and background relevance. Identifying your best 2–3 filming locations in advance eliminates last-minute setup problems.

Location name (e.g. 'living room south wall', 'kitchen counter', 'bedroom closet')

---

Natural light source (window direction, morning vs. afternoon quality)

---

Background description and relevance to your niche (clean / relevant / distracting)

---

Audio quality (echo level: low / medium / high; background noise sources)

---

---

Suitability for talking-head segments (yes / no / with adjustments)

---

---

Suitability for product close-up shots (yes / no / with adjustments)

---

---

Overall rating (1–5)

---

---

One adjustment needed to improve this location (e.g. 'move bookshelf', 'add curtain to reduce echo')

---

### Checklist: Pre-Filming and Delivery Checklist

- Read brief fully and note all required claims, restricted claims, tone, and CTA language
- Write a full script for the hook, body, and CTA before filming
- Test audio with a 10-second clip and play back with headphones
- Confirm window light is front-facing or 45 degrees — not behind you
- Lock phone focus and exposure by tapping the screen before each clip
- Film at least 2–3 takes of each segment — never rely on a single take
- Capture product close-ups and b-roll during the same session
- Edit to full draft and review once at full speed before exporting
- Name exported file: [BrandName]\_[Product]\_[AdType]\_v1\_[Date].mp4
- Organize delivery folder: final video + raw clips subfolder
- Send delivery with a 1–2 sentence note on the creative decisions made

## Scaling, Client Management, and Building Recurring Revenue

Set up your client communication system, plan your retainer conversion approach, and map your 90-day income targets.

### Exercise: Retainer Conversion Script Exercise

Draft and refine the three messages you will use to convert repeat project clients into monthly retainers. Writing these in advance means you can send them confidently without hesitation.

- Write the retainer proposal email you will send after a client's second re-order. Include: what you are proposing, the per-video rate discount, the minimum commitment period, and what they get in return.
- A client responds and asks why they should commit for 3 months instead of ordering as-needed. Write a 3-sentence response that addresses this without being pushy.
- Write the referral request line you will add to your standard post-delivery follow-up email (2–3 sentences, specific ask, mentions the incentive you are offering).

---

### Worksheet: 90-Day Revenue Planning Worksheet

Fill in this worksheet at the start of each 30-day period to set income targets, plan outreach volume, and track whether your pipeline is on pace.

Month (1 / 2 / 3)

---

Monthly revenue target (\$)

---

Average rate per video deliverable (\$)

---

Number of deliverables needed to hit target

---

---

Active retainer clients (count) and monthly value (\$)

---

---

Per-project clients needed beyond retainers

---

---

Number of outreach pitches planned (to generate needed clients at 3–8% reply rate)

---

---

New platform briefs to apply for (Billo / Insense / JoinBrands)

---

---

Actual revenue earned at month end (\$)

---

---

Variance vs. target (positive / negative \$) and primary reason

---

### Checklist: Weekly Operations Checklist

- Monday: send 10–15 new outreach pitches to qualified brands
- Monday: respond to all pending briefs on UGC platforms within 24 hours
- Monday: send any outstanding invoices or follow up on overdue payments
- Tuesday–Wednesday: batch film all active project footage
- Thursday: edit all filmed footage and export deliverables
- Friday: send all pending deliverables with creative context notes
- Friday: follow up on deliveries sent 3 days prior to confirm receipt
- Friday: review the week — note which outreach channel produced replies
- End of month: update your rate card based on capacity and demand signals
- End of month: reach out to past clients with a check-in or retainer proposal

### Your Action Plan

1. Choose your primary UGC niche using the environment fit + brief count scoring method from Section 1
2. Buy 1–2 products in your niche under \$25 each and film 3 spec ads following the hook-body-CTA framework
3. Edit all 3 spec ads with captions and export at 1080x1920 MP4
4. Build your portfolio page on Stan.store or Notion and publish it with a starting rate anchor and contact link
5. Create accounts on Billo, Insense, and JoinBrands and submit your profile with portfolio link
6. Build your first 20-brand outreach list using Meta Ad Library and the brand target worksheet
7. Write 3 pitch versions (email, DM, LinkedIn) using the 4-line structure before sending any outreach
8. Set up your contract template with deposit terms, revision policy, usage rights, and payment due dates
9. Send 10–15 personalized pitches in your first week and schedule Day 5 follow-ups immediately
10. After your first paid delivery, initiate a retainer conversation with the client within 30 days if they show satisfaction









