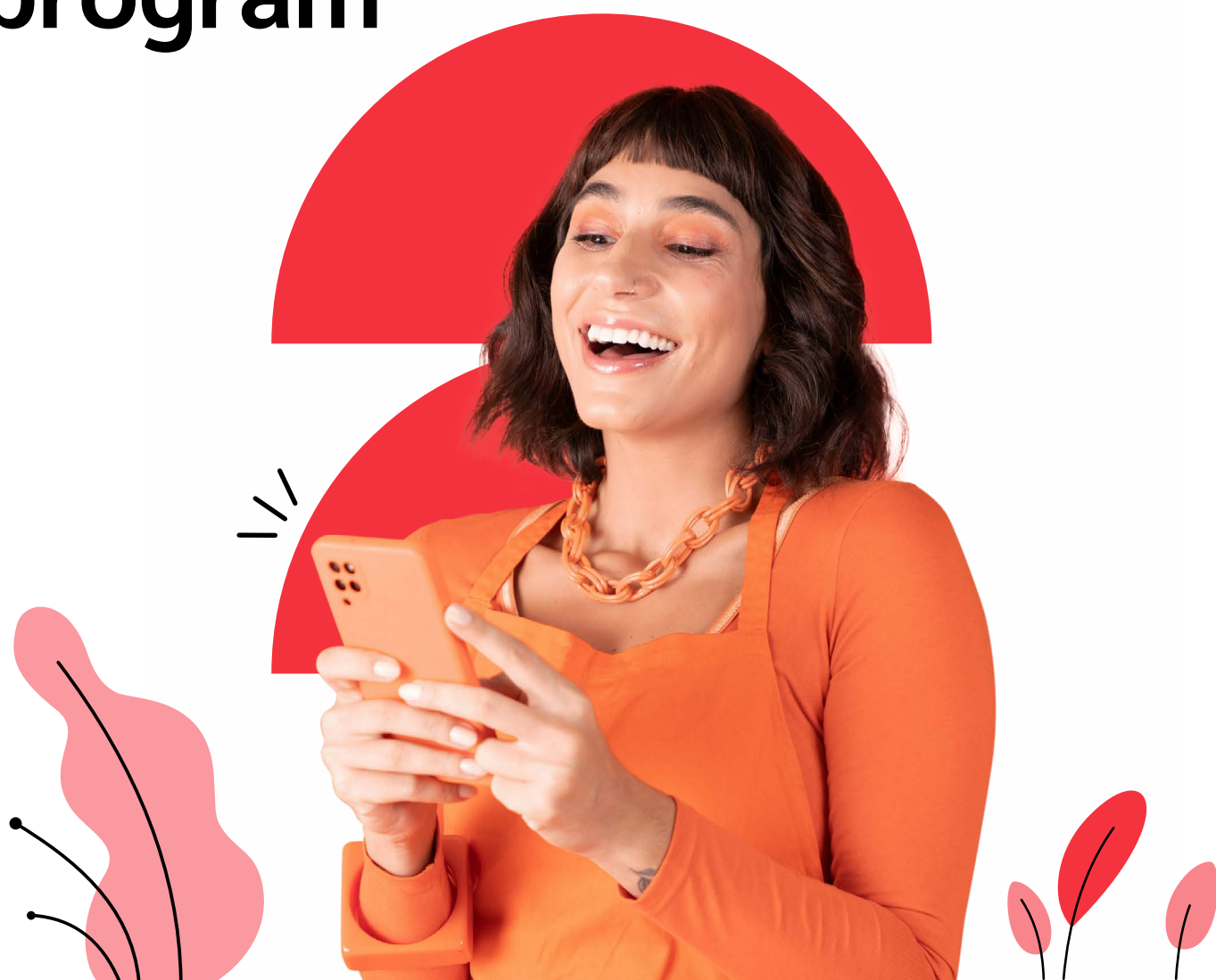
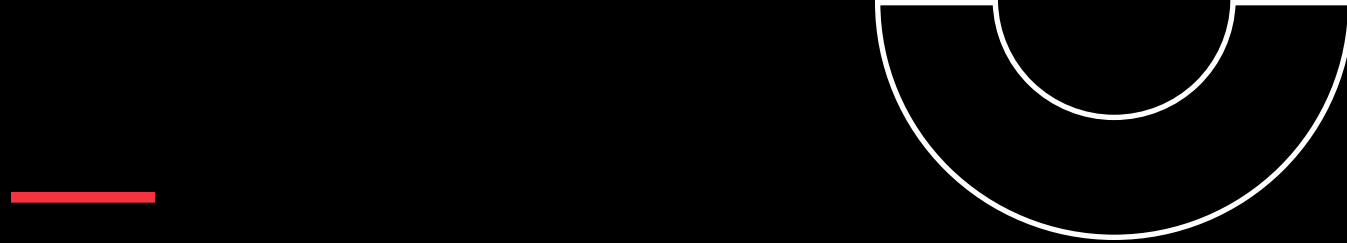


Step-by-step worksheet

Building a successful influencer marketing program





This step-by-step worksheet is designed to help your brand establish clear criteria for recruiting content creator partners while identifying the tools and services critical to your success.

Use this worksheet as a blueprint to:

- **Define** your program overview
- **Identify** ideal customer profiles
- **Manage** partner expectations
- **Outline** a management strategy

Worksheet tips:

- **Collaborate with internal teams and agencies** to answer key questions and refine your influencer strategy.
- **Revisit regularly** to guide decisions and optimize performance.

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Program overview

1. Which type of influencer program am I interested in running?

(sponsored content, product sampling, events, content creation, ambassadorship, strategy, influencer agency of record, etc.)

2. What are my brand's content/program themes?

(holiday sales, product launches, general evergreen content, social responsibility, etc.)

3. Which principles of my brand's mission or message should my partners embody?

4. What are my goals and objectives for influencer partnerships?

- ☐ Increase brand awareness
- ☐ Drive traffic
- ☐ Drive brand engagement
- ☐ Drive sales
- ☐ Drive user actions (i.e., app installations, form submissions, etc.)
- ☐ Generate content
- ☐ Other

5. What are my key performance indicators (KPIs) to measure the success of my influencer partnerships?

- ☐ Impressions
- ☐ Engagement
- ☐ App downloads
- ☐ Social media followers
- ☐ Product sales
- ☐ Reach
- ☐ In-store traffic
- ☐ Return on ad spend (ROAS)
- ☐ Other

6. What is my investment level? Do I have any budget allotments or restrictions?

7. Is your influencer strategy focused primarily on:

- ☐ Building an ongoing creator community
- ☐ Executing distinct, time-bound campaigns
- ☐ A hybrid approach

If hybrid, what percentage of resources will you allocate to:

Community building: %

Campaign execution: %



8. How will you maintain creator relationships between campaign activations?

(e.g., exclusive creator events, early product access, regular check-ins, etc.)





Customer profile

9. Who is the target audience for my program and products? (Think about your target's demographic, geographic, and psychographic attributes.)

(e.g., A baby product targeted to new moms in big cities, a cleaning product targeted to new pet owners, a subscription service targeted to Gen Z/millennial work-from-home professionals, etc.)

10. Where are my main markets?

(United States, Canada, Europe, specific cities within the United States, etc.)

11. Beyond traditional influencers, what types of creators will your program include?

- ☐ Industry experts/thought leaders
- ☐ Employee advocates
- ☐ Customer creators/brand fans
- ☐ Professional content creators (photographers, videographers)
- ☐ Educational content creators
- ☐ Entertainment-focused creators
- ☐ Other: _____

12. How will your approach (compensation, guidelines, expectations) vary across different creator types?

(Consider how strategies might differ between, for example, a subject matter expert vs an entertainment creator)

Partnerships expectations

13. Which social platforms are a priority, and what platform-specific features will your program leverage? Platform priorities:

- ☐ Instagram
- ☐ TikTok
- ☐ YouTube
- ☐ Pinterest
- ☐ Twitch
- ☐ LinkedIn
- ☐ Other: _____

Platform-specific features to leverage: (e.g., TikTok Shop integration, Instagram Collabs, YouTube Shorts, Pinterest Shopping, etc.)

14. Where will my influencer content drive users to?

(Blogs, brand sites, product pages, retailers, etc.)



15. Which tracking technology do I expect my partners to use?

(Vanity links/tracking URLs, UTMs, embed codes, etc.)

16. How will I compensate influencers? If monetary payment isn't an option, should I offer products as gifts instead?

(Options can include flat fees, commission based on a percentage of sales, or a hybrid model. Other possibilities include a fixed rate per app installation, performance bonuses for meeting specific targets, complimentary event access, and more.)

17. If I'm sharing products with my partners, will I ship them? Is international shipping included?



18. Do I require partner exclusivity?* If so, what are the terms and duration?

(e.g., Partners not permitted to work with another yoga brand for nine months, no competitor-sponsored content three days before content launch and three days after activation, etc.)

**Note: Exclusivity may significantly drive up influencer fees.*

19. What are my expectations around content usage rights?*

(e.g., Full digital usage rights [including paid social, digital ads, and email marketing], organic and paid social rights, organic social reposting rights for six months with the option to renew, etc.)

**Note: Usage rights may significantly drive up influencer fees.*



20. Does content need to be approved before it goes live? If so, what will the content review process look like? Does it need to go through legal or other reviewers?

Reviewer(s):

Days needed to review:

Final sign-off requirements:

Edit/review process:

21. How will your program maintain regulatory compliance while preserving authentic creator voices?

- ☐ Provide pre-approved disclosure language templates
- ☐ Create a disclosure guideline document
- ☐ Implement approval processes for disclosure placement
- ☐ Conduct regular compliance training for creators
- ☐ Partner with the legal team for ongoing guidance
- ☐ Other: _____

22. What guidelines will you provide creators with to maintain authenticity while promoting your brand?

(e.g., sharing personal experiences with the product, using their natural voice and style, integrating products organically into their regular content, etc.)





Data strategy and privacy

23. How will you integrate creator-driven traffic into your first-party data strategy?

- ☐ Custom landing pages with data capture
- ☐ Unique discount/promo codes
- ☐ Personalized UTM parameters
- ☐ Creator-specific QR codes
- ☐ Other: _____

24. What privacy considerations must you address when tracking creator-referred customers?

(Consider relevant regulations like GDPR, CCPA, etc. and how they impact your tracking capabilities)

25. How will you communicate data collection practices to creators and their audiences?

(e.g., transparency in creator briefs, disclosure in campaign materials, etc.)





Program management

26. Which teams will need to collaborate internally? How much time will this require, and do they have the capacity to contribute? What are the associated costs of involving these teams, and what benefits can be expected in return?

Internal teams:

(Marketing, design, PR, legal, finance, etc.)

Time commitment:

Resource costs:

Expected benefits:

27. How often will the management team meet to assess the program and keep stakeholders aligned?

(Bi-weekly, monthly, quarterly, etc.)



28. How will the project management team support enduring influencer partnerships and ensure long-term success?

(Identify future opportunities and optimization strategies, invest in creator relationships, prioritize terms and activations that reward long-term partnerships, etc.)





AI and technology integration

29. Which aspects of your influencer program will incorporate AI or automation tools?

- ☐ Creator discovery and vetting
- ☐ Content performance prediction
- ☐ Automated brief generation
- ☐ Real-time performance analytics
- ☐ Content repurposing/optimization
- ☐ Comment moderation and engagement
- ☐ Contract and payment processing
- ☐ Other: _____

30. How will you balance automated processes with human relationship management?

(Consider which touchpoints require personal attention vs which can be effectively automated.)

Transform your strategy into action

Congratulations! You've developed a comprehensive blueprint for your influencer program. Now it's time to activate your strategy:

1. Prioritize your next steps

- Identify the 3 most critical elements from your worksheet
- Set implementation deadlines for each priority
- Assign team members to lead each initiative

2. Build your creator recruitment plan

- Use your audience and platform insights to create ideal creator profiles
- Develop outreach templates based on your program goals
- Set clear timelines for creator onboarding

3. Develop your measurement dashboard

- Create a tracking system for your identified KPIs
- Establish baseline metrics and target goals
- Schedule regular performance reviews based on your management cadence

4. Schedule a program launch meeting

- Share this completed worksheet with all stakeholders
- Align on expectations, responsibilities, and timelines
- Address potential challenges before they arise

Revisit it quarterly to refine your approach and keep your program aligned with industry changes and your business objectives.



Strengthen your influencer management skills using these guides:

The ultimate guide to influencer marketing in 2025 (blog)

Influencer partnerships: How to manage the full life cycle (infographic)

2025 influencer rate guide: what content creators charge per post (blog)

Five steps to building a successful influencer marketing strategy (infographic)

How brands can drive more results with creator campaigns (video)

The ultimate guide to influencer tiers: from nano creators to megastars (ebook)

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