

Influencer Marketing Campaign Checklist

*A comprehensive and strategic approach for
any Influencer Marketing Campaign*

TABLE OF CONTENTS

- ☐ Define your Objective
- ☐ Set SMART Goals
- ☐ Identify your Audience
- ☐ Pick the right Platforms
- ☐ Breakdown your Budget
- ☐ Optimize your channels
- ☐ Lay out the Content Strategy
- ☐ Prepare to Onboard Influencers
- ☐ Reach Out & Qualify
- ☐ Launch Campaign
- ☐ Mitigate Bottlenecks
- ☐ Monitor & Report

DEFINE YOUR OBJECTIVE

- ☐ Increase brand awareness
- ☐ Drive website traffic
- ☐ Boost sales and conversions
- ☐ Enhance customer engagement
- ☐ Grow your social media following
- ☐ Improve public perception & sentiment
- ☐ Influencer & User-Generated-Content

Similar to running an Ad Campaign, you want to **focus on a single objective.**

It's easy to pack many goals into one campaign, which is precisely why many influencer campaigns fail.

SET S.M.A.R.T. GOALS

- ☐ **Specific:** Concrete targets with a single objective
- ☐ **Measurable:** How do you define success? (in numbers)
- ☐ **Achievable:** Are these targets realistic?
- ☐ **Relevant:** is there a direct correlation between your target and your overall marketing goals?*
- ☐ **Time-bound:** what timeframe do you plan to accomplish this?

**Many brands and executives may say that they want followers or impressions, but these goals do not necessarily correlate with sales.*

If your brand wants sales, set your goals around sales.

Personal brands often want followers but will say they just want "to go viral". This has been the bane of my career.

IDENTIFY YOUR AUDIENCE

Demographic Information	
Interests/Hobbies/Lifestyle	
Social Media Behavior	
Favorite social networks	
Types of Content Consumed	
Influencer Preferences	
Purchasing Behavior	
Messaging, Voice and Tone	
Painpoints & Motivations	

Most businesses have this info available and know this instinctively. It’s a good practice to review and confirm the data.

Breakdown of Demographic Information:

- ☐ Age group
- ☐ Gender
- ☐ Location
- ☐ Education
- ☐ Occupation
- ☐ Income range

CHOOSE THE RIGHT PLATFORMS

Based on your objective, you'll need to select the best primary platforms for your influencer campaign.

Though it's a best practice (and negotiation tactic) to ask the influencer to publish to all their relevant channels.

	Content	Price	Notes
TikTok	Vertical Video	💰💰	the hottest platform but can be sporadic with engagement
Instagram	Video, Photo, Stories	💰💰	gold standard for social media influencer campaigns
YouTube	Longform Video	💰💰💰💰💰	drives the most long-term impact
Twitter	Video, Photo, Shares, Blogs	💰	excellent for traffic
Facebook	Video, Photo, Shares, Blogs	💰	excellent for traffic, potential to go viral
Pinterest	Infographics, Photos	💰💰	excellent for traffic and long-term value

Prices will often vary per platform. YouTube tends to be the most expensive but can also drive the most value. Keep this in mind when determining your goals and working out a budget.

OUTLINE YOUR BUDGET

- ☐ Amount for influencer spend
- ☐ Cost of goods and shipping to influencers
- ☐ Cost of any Unboxing services (if applicable)
- ☐ Cost of any additional support/admin for the campaign
- ☐ Sponsored posts and ads (incl. Spark ads for TikTok)
- ☐ Software and tools for searches, tracking, and reporting*
- ☐ Costs for editors and designers if you're focusing on UGC

The bulk cost of a standard influencer campaign will be the influencers. If you're running a gifting/seeding campaign, you can still expect to spend hundreds to thousands on software and shipping, alone.

**Many big-name influencer marketing software will cost \$1,500-3,500 per month. If you're on a tight budget and researching software, look for pricing on the site. If there is no pricing, but an option to "request demo" expect to be "sold" on a very expensive tool during that demo.*

OPTIMIZE YOUR CHANNELS

- ☐ Consistent branding and messaging
- ☐ Update your bio captions to align with campaign
- ☐ Make sure your accounts are Business Accounts
- ☐ Link to offer in your profile / bio*
- ☐ Pin top post (or offer) in your feeds
- ☐ Consider a Chatbot or staff on-hand to engage
- ☐ Check your website pixels (or install)
- ☐ Review your email flows and marketing automations
- ☐ If you don't have SEO, consider buying ads for your brand's name



**Many brands love to use LinkTree or similar apps. If you're focusing on a single direction and objective, you don't want to give people too many choices. Limit your link(s) in a campaign to one single destination (esp. if you're objective is traffic or conversions).*

DEVELOP CONTENT STRATEGY

- ☐ What is the offer?
- ☐ Types of content (videos, carousels, blogs, threads...)
- ☐ Themes and messaging
- ☐ Brand Guidelines (logos, colors, fonts, etc)
- ☐ Tags, hashtags, and keywords
- ☐ CTA (call-to-action) elements
- ☐ Collaboration guidelines for influencers
- ☐ Content examples and wishlists
- ☐ Scripts & shot lists (if applicable)

Influencers tend to be highly creative and visual. They also know their audience better than you and understand the nuances of what works on social media.

Allow them enough creative freedom to align your brand with their audience but also include examples of content that has performed well for you in the past. You can also show examples from other brands.

ONBOARDING PREP

- ☐ Scope of work and deliverables
- ☐ Payment terms and conditions
- ☐ Usage rights and content ownership (if applicable)
- ☐ Exclusivity and non-compete clauses (if applicable)
- ☐ FTC guidelines and disclosure requirements
- ☐ Compliance Do's & Don'ts for influencers

☐ **Influencer Campaign Brief:** use the onboarding prep + creative strategy to create a brief that you can publicly share with potential influencers.

look out for...

- ☐ An authentic following
- ☐ Highly engaged audience
- ☐ Excited about your brand and products
- ☐ A history of high-performing brand collaborations

👉 *This Influencer Quality Checklist was provided by Dan Coughlin of Get Hyped Media, a colleague in the Influencer Industry whom I strongly admire and look up to.*

OUTREACH AND VETTING

- ☐ Influencer research and list building
- ☐ Client or supervisor approval of list
- ☐ Outreach to approved influencers* (include link to creator brief and ask for rates, if interested)
- ☐ Rate confirmation, negotiation, and budget review
- ☐ Follow up with SOW's and agreement
- ☐ Payment information (and processing according to terms)

	URL	Name	Following	Contact	Rate	Background
<input type="checkbox"/>	https://www.instagram.com/arniewatkins/	Arnie Watkins	292,000			Extreme Sports
<input type="checkbox"/>	https://www.instagram.com/lordclout/	"Lord Clout"	262,000			Extreme, TikTok, Viral
<input type="checkbox"/>	https://www.instagram.com/mattwilson123/	Matt	123,000			Extreme, TikTok, Viral
<input type="checkbox"/>	https://www.instagram.com/gagewilson/	Gage Wilson	175,000			Extreme, TikTok, Viral
<input type="checkbox"/>	https://www.instagram.com/saydaya/	Sayda	135,000			Fashion, Producer, Comedy
<input type="checkbox"/>	https://www.instagram.com/jaylenecook/	Jaylene Cook	411,000			Travel, Lifestyle, Nature
<input type="checkbox"/>	https://www.instagram.com/amandataylor/	Amanda Taylor	1,000,000			Travel, Model, Fashion
<input type="checkbox"/>	https://www.instagram.com/michellexuxu/	Michelle Xuxu	61,000			Travel, Lifestyle
<input type="checkbox"/>	https://www.instagram.com/marlonwebb/	Marlon Webb	1,500,000			Comedy, Viral,

If you're not using custom software, you can build lists in Google Sheets or project management tools like ClickUp, Monday, etc.

These lists can expand and be shared internally with clients, supervisors, accounting and team members.

EMAIL TEMPLATE

Hi Influencer,

Compliment + why you'd want them to work with your brand.

Outline basic campaign vision, goal.

If this is something you're open to, would you mind sending me your pricing for the following deliverables:

- Deliverables*
- Timeline*

Offer to follow up with a brief.

Thank you,

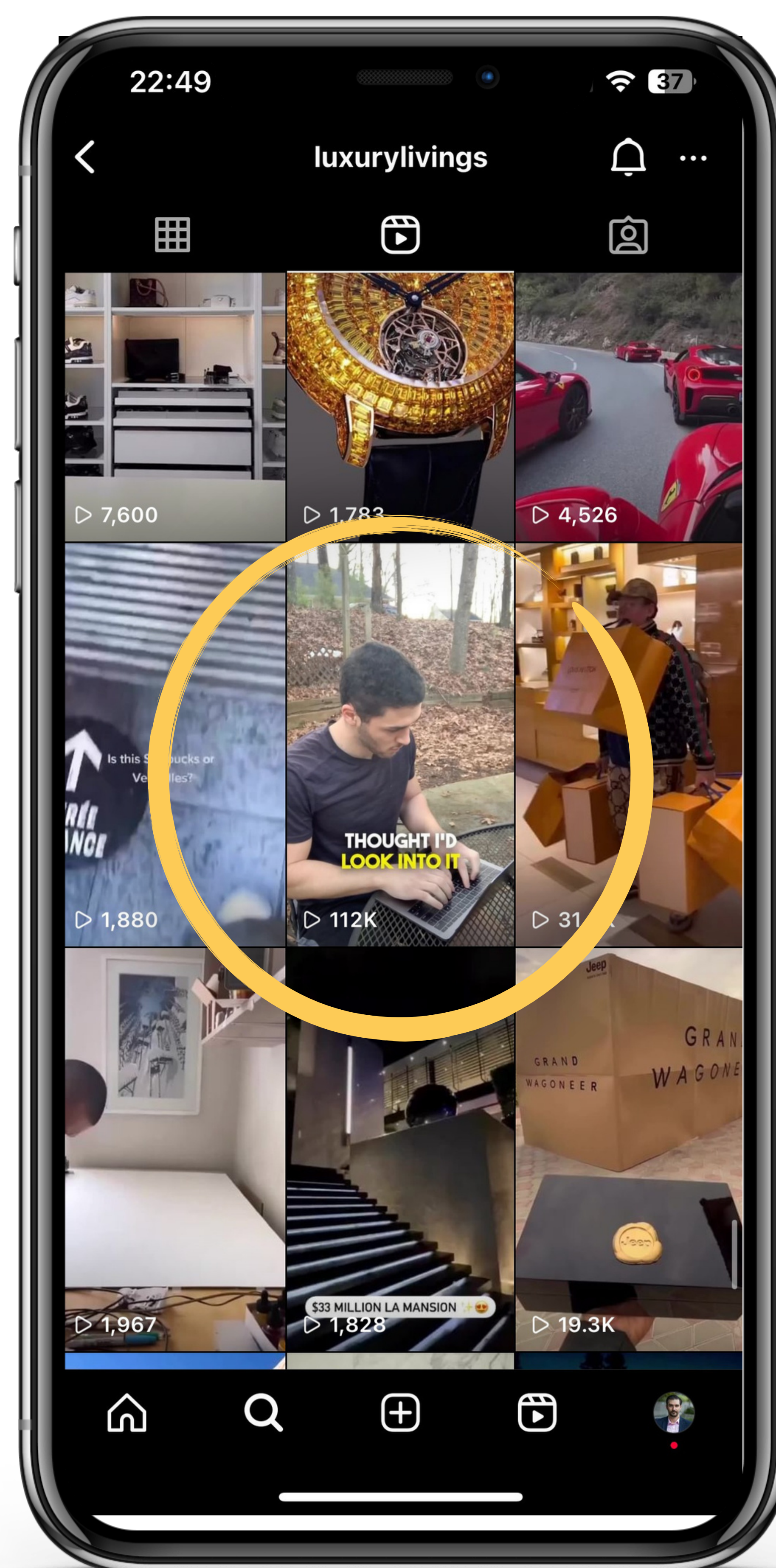
Signature | Brand

Reach out to the influencers on your list via email and DM.

They make their income by promoting for brands and most will be responsive if they'd like to work with your brand.

CAMPAIGN LAUNCH

- ☐ Ongoing communication with influencers
- ☐ Ensure timely and accurate content publishing
- ☐ Track campaign performance in real-time
- ☐ Engage with posts in real-time
- ☐ Engage with your audience and new followers
- ☐ Share posts to stories
- ☐ Listen to feedback from influencers and fans
- ☐ Collect analytics and record proof of posts



COMMON BOTTLENECKS

- Influencer excuses (moving, traveling, it's cloudy...)
- Executive approvals
- "Creative input" from anyone on your team
- Accounting - payments, 1099's, etc
- Legal - approval and revisions for compliance
- Lack of clarity and communication
- Revision requests
- Normal life events (sick, family problems, anything...)

MITIGATING BOTTLENECKS

- ☐ Give influencers earlier deadlines than your deadline
- ☐ Don't piecemeal and send a courtesy reminder
- ☐ Limit team input, don't ask "what do you think/feel"
- ☐ Have all influencer info set up for accounting
- ☐ Give Attorneys editable docs to redline and correct
- ☐ Outline everything in a creator brief and share a "living doc" with realtime updates
- ☐ Limit revisions and be flexible with influencer creativity
- ☐ Be patient and understanding, life is more important than an Instagram post. Communicate with your team

MEASURING & REPORTING

- ☐ KPIs such as engagement, reach, and impressions
- ☐ Conversion rates, website traffic, and sales
- ☐ Outline a process for influencers to report metrics
- ☐ Follower growth and audience demographics
- ☐ Influencer performance comparison
- ☐ Lessons learned and future improvements

If you're using sheets or a project management tool, the influencer list can turn into the campaign list which can also turn into an accounting and analytics spreadsheet.

If you're collecting assets, you can add links from Google Drive, Dropbox in the respective creator rows or upload them into the software.

No matter how perfectly you execute, expect things to get a little messy.

CHECKLIST SIMPLIFIED

Pre-launch

- ☐ Goals, audience, platform and budgets outlines
- ☐ Content Strategy + Creator Brief
- ☐ Influencer Lists
- ☐ Influencer Outreach & Vetting
- ☐ Influencer Onboarding
- ☐ Crisis / Backup plan
- ☐ Establish timelines for everything on this list

Launch

- ☐ Influencer Payments
- ☐ Ongoing communications
- ☐ Approvals and revisions
- ☐ Monitoring and spreadsheet updates
- ☐ Community engagement (brand + influencers = ❤️)

Post-launch

- ☐ Ads & retargeting
- ☐ Chasing stragglers
- ☐ Content permissions (if you want to run ads or repost)
- ☐ Final reporting
- ☐ Turning winning creators into brand ambassadors

ADDITIONAL SUGGESTIONS

- ☐ Focus on one objective
- ☐ Have a clear and enticing offer
- ☐ Ask users to do only 1 thing
- ☐ Stay on brand
- ☐ Don't micro-manage the influencers
- ☐ Have a specific destination, call to action
- ☐ Build a community
- ☐ Follow up with retargeting ads
- ☐ Use influencer content in your ads (with permission)