

How to set up a successful influencer program

Download this worksheet to establish criteria and terms for potential influencer creator partners and to discover the tools and services you'll need.



**Interactive
worksheet**
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Whether you're building from scratch or converting a collection of campaigns into one unified, scalable program, your answers will serve as a blueprint. Return to this worksheet each time you need to make a critical decision about managing your influencer partnerships.

For best results, collaborate on the worksheet's questions with the internal teams and agencies that will contribute to your influencer program.

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 tenets of my brand message or mission do my partners need to reflect?

(sustainability, customer obsession, kindness, innovation, etc.)

Program overview (cont.)

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?

Customer profile

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

(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 [WFH] professionals, etc.)

8. Where are my main markets?

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

Partnerships expectations

9. Which social platforms are a priority? Do I want my partners to create static or video content?

(static images for Instagram and reuse, short-form videos for TikTok, longer form videos for YouTube, etc.)

10. Where will my influencer content drive users?

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

Partnerships expectations (cont.)

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

(vanity links/tracking URLs, UTM, embed codes, etc.)

12. How will I compensate influencers? If I'm not providing monetary compensation, will I gift product?

(a standard fixed fee per person, bid fee per person, percentage of sale, fixed price per app install, performance bonus for hitting a designated goal, comped event attendance, etc.)

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

14. Will I require partner exclusivity?* Within which competitive set and for how long?

(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.*

Partnerships expectations (cont.)

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

(full out-of-home and digital usage rights [including paid social, digital ads, and email marketing], organic and paid social rights, organic social reposting rights for six months with option to renew, etc.)

16. 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):

Final sign-off requirements:

Days needed to review:

Edit/review process:

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

Program management

17. Which teams will need to internally collaborate? What's the projected time commitment and do they have the bandwidth to contribute? What are the costs of using these teams? What are the expected benefits?

Internal teams: *(marketing, design, PR, legal, finance, etc.)*

Resource costs:

Time commitment:

Expected benefits:

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

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

19. 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.)

Congratulations!

You have created a solid framework for a successful influencer partnerships program. Treat this worksheet as your North Star, and you'll save yourself time, avoid confusion, and save on spend. Most importantly, you'll have a foundation for sustainable growth and a way forward to get creative with your creators.

Looking for more ideas and guidance? Check out these impact.com resources on influencer partnerships management:

- [Ultimate guide to influencer marketing](#) (ebook)
- [Seven ways to pay influencers today and tomorrow](#) (ebook)
- [What influencers really want](#) (video)