

THE UGC PLAYBOOK

FOR CREATORS

After-the-Deal UGC Delivery & Handover Checklist

Turn delivery into renewals, referrals, and repeat work.

AFTER-THE-DEAL UGC DELIVERY & HANDOVER CHECKLIST

After-the-Deal UGC Delivery & Handover Checklist

Turn delivery into renewals, referrals, and repeat work. This checklist keeps delivery crisp, reduces back-and-forth, and naturally sets up renewals, retainers, and referrals without adding work.

How to Use It

1. Duplicate this checklist for every brand.
2. Tick items top-to-bottom as you package files, send the handover, and schedule follow-ups.
3. Paste the email/DM templates as-is and swap the [brackets].
4. Log key dates (delivery, usage start/end, follow-ups) in your tracker.

TA) Final Quality Check (before exporting)

- ☐ Matches brief, target persona, and claims.
- ☐ Hook < 3s • Total 20–35s (unless agreed otherwise).
- ☐ Clear audio (no hiss/hum), no copyrighted music.
- ☐ Framing steady; no distracting background; brand/product clearly visible.
- ☐ Lighting consistent; color balanced; skin tones natural.
- ☐ Spelling checked in on-screen text/captions.
- ☐ No competitor logos or trademarked assets in frame.
- ☐ Any on-screen “results” are truthful; add “results may vary” if needed.
- ☐ Captions accurate; punctuation for readability.
- ☐ File spec correct (see B).

B) Export & File Spec (copy this into your package)

- Format: MP4, 1080×1920, 23.98–30fps, ≤ 50MB per asset.
- Audio loudness around -14 LUFS (not mandatory, just safe).
- Deliver: 1 hero, 2 hook variants, 1 cut-down (10–12s).
- Include: .SRT captions + thumbnail/cover image.
- Optional crops if agreed: 1:1 and 16:9.
- Naming: [Brand]
[Product]Hero/HookA/HookB/Cutdown[Creator][v1].mp4
- Thumbnail: [Brand]_[Product]Thumb[v1].png
- SRT: [Brand]_[Product]Hero[v1].srt

C) Delivery Folder Structure (ready to zip)

```
/[Brand]_[Project]_Deliverables_[YYYY-MM-DD]/  
├── 01_Video/  
│   ├── [..Hero/HookA/HookB/Cutdown..].mp4  
│   └── SRT/  
│       └── [..matching .srt files..]  
├── 02_Thumbs/  
│   └── [thumbnail files]  
├── 03_Photos/ (if included)  
├── 04_Docs/  
│   ├── Usage_Summary.txt  
│   ├── Content_Map.csv  
│   └── Ad_Specs_Card.pdf  
└── ReadMe_Start-Here.txt
```

Usage_Summary.txt template (paste in):

- Deliverables: [e.g., 2× 20–30s videos + 2 hooks + 1 cut-down]
- Term: 3 months organic (included) + 30 days paid on [platforms] starting [DD/MM]
- Whitelisting: [Allowed? Y/N. If Y: 30 days included/not included]
- Exclusivity: [None / Category / Until DD/MM]
- Revisions: 1 round minor revisions included
- File specs: MP4 1080×1920, SRT, thumbnail
- Renewal options: 1 platform £[] • 2 platforms £[] • All major £[] (per 30 days)
- Contact: [your email] • Portfolio: [link]

Content_Map.csv columns: Asset | Hook/Angle | CTA | Length |
Notes

D) Handover Email (copy/paste)

Subject: Final files + simple next step for [Brand]

Hi [Name],

Your files are ready here: [folder link]. Inside you'll find:

- Videos: 1 hero + 2 hook variants + 1 cut-down (10–12s)
- Captions: SRT files
- Thumbnail: cover image
- Docs: Usage summary, ad specs, and a content map

Usage recap: 3 months organic + 30-day paid usage for [platforms], starting [DD/MM].

Easy next step (pick one):

- Extend paid usage 30 days → £[amount]/platform
- Add 2 extra hooks for A/B testing → £[amount]
- Quick call to plan [season/event] ads → [calendar link]

Invoice: I'll send 50% balance now; files remain available via link.

Shout if you need alternate crops or a different thumbnail—happy to help.

Thanks again!

— [Your Name]

[Signature + Portfolio link]

6) 30-Day Snapshot + Renewal (Day 30)

Subject: 30-day snapshot + simple renewal

Hi [Name], hope the launch has gone well! Quick pulse check (if available):

- 3-sec hold: [x%] | View-through: [x%] | CTR: [x%]
- Here are renewal options for the next 30 days of paid usage:
- Lite: Renew 1 platform → £[amount]
- Core (popular): Renew 2 platforms → £[amount]
- Scale: All major platforms → £[amount]
- Happy to invoice whichever you choose.
- — [Your Name]

(No metrics? Replace with “If you’re seeing good performance, the simplest next move is renewing usage for another 30 days on your best platform for £[amount].”)

7) Seasonal Idea Drop (Day 45)

Subject: 3 quick ideas for [Season/Event]

Hi [Name], three bite-size concepts you can plug in next week:

1. Hook: “[pain] ends here.” Beat: demo in 2 steps.
2. Hook: “I switched to [Product] for [result].” Beat: 3 reasons.
3. Hook: “Before → After in [time].” Beat: challenge format.

I can film 2 concepts + 2 cut-downs for £[amount]. 48–72h turnaround if needed.

— [Your Name]

E) Same-Day Admin (tick these right after sending)

- ☐ Send final invoice with agreed terms (Net-7 for agencies or as agreed).
- ☐ Log usage start/end dates; set calendar reminders -5 days before expiry.
- ☐ Note deliverables/version in your tracker; attach folder link.
- ☐ Back up project to 2 locations (cloud + local).
- ☐ If product must be returned, confirm return label or keep policy.

F) 7–30 Day Care Plan (light-touch, value-first)

- Day 7 — Performance pulse (no pressure):
 - ☐ DM/email: “Want me to cut a 10s retargeting version from Hook B?”
- Day 14 — Bonus micro-win (optional):
 - ☐ Share 1 unannounced cut-down or thumb variation.
- Day 21 — Idea nudge:
 - ☐ Send 3 hook starters based on early comments (“people keep asking about X”).
- Day 30 — Renewal:
 - ☐ Offer Lite/Core/Scale paid-usage renewal options; link invoice.

G) Renewal & Whitelisting Blocks (drop-in text)

30-Day Paid Usage Renewal (choose one):

- Lite: 1 platform → £[]
- Core (popular): 2 platforms → £[]
- Scale: All major platforms → £[]
- Whitelisting add-on (30 days): +£[]

If brand requests whitelisting:

“Happy to enable whitelisting/Spark. Send your ad account ID and I’ll approve the request (or I can generate a Spark code).

Whitelisting is £[] per 30 days per asset, billed with usage.”

H) Troubleshooting (when things wobble)

- “Can we change the script after delivery?”
- → “Happy to—this is a new concept/reshoot at the creation rate, or we can do a minor edit if it’s script-accurate.”
- “We need perpetual paid usage.”
- → “Perpetual paid usage is priced at 4–6× the 30-day all-platform rate. Most teams prefer monthly renewals or a 12-month license at a reduced monthly rate.”
- Ghosting after delivery
- → Send a 30-day renewal template + invoice link; calendar a polite reminder 48h later.

1I) Testimonial & Referral (when there's a win)

- Testimonial ask (2 lines):
 - “Could you approve one of these 2-liners?”
 - • “[Creator] cut our CPA by [x%] in week one.”
 - • “[x%] higher CTR vs. control—fast and on-brand.”
- Referral ask:
 - “If anyone in your network needs UGC, this blurb makes intros easy:
 - “[Creator] creates conversion-focused UGC with smart hooks and clean licensing. Portfolio: [link].”

J) Portfolio & Rights (protect yourself)

- ☐ Confirm permission to share assets in your portfolio (or anonymize).
- ☐ Use a watermarked version for portfolio if still in paid usage.
- ☐ Store signed SOW/usage terms with the project.

One-Line Footer (add to your PDFs)

- Spec: MP4 1080×1920 ≤50MB • Hook <3s • Deliver 1 hero + 2 hooks + 1 cut-down • Include .SRT + thumbnail • Name files clearly
- Log usage start/end + set renewal reminder.



AFTER-THE-DEAL UGC DELIVERY & HANDOVER CHECKLIST

WWW.THEUGCPLAYBOOK.COM