

THE UGC PLAYBOOK

FOR CREATORS

Relationship Builder Template

Turn one-off deals into repeat paid brand collaborations
with this simple but powerful relationship-building
system..

WWW.THEUGCPLAYBOOK.COM



RELATIONSHIP BUILDER TEMPLATE

Turn one-off deals into repeat paid brand collaborations with this simple but powerful relationship-building system.

How to Use It

1. Pick your active brand → plug in names, dates, deliverables.
2. Follow the 90-day cadence below. It's light, professional, and value-first.
3. Copy the templates (email/DM) as written, swap in the [brackets].
4. Track touchpoints in your Notion/Sheet (fields provided).
5. Every message should give one clear next step (renewal, call, or quick yes/no).

The 90-Day Relationship Cadence (copy/paste)

- Day 0 — Kickoff: Thank-you + expectations + next steps.
- Day 2 — Check-in: “Anything to add?” (reduces scope creep later).
- Day 7 — Preview: 10-sec rough cut or first still (builds trust).
- Day 14 — Delivery: Files + usage recap + next-step options.
- Day 21 — Micro-win: Share 1 actionable idea or bonus cut-down.
- Day 30 — Light Report: Simple results snapshot + renewal nudge.
- Day 45 — Idea Drop: Seasonal concept or A/B hook options.
- Day 60 — Renewal: 3 options (Lite/Core/Scale) + calendar link.
- Day 75 — Retainer Pitch: Monthly package with clear ROI angle.
- Day 90 — Celebrate: Quick thank-you, testimonial + referral ask.

(If timelines shift, keep intervals; adjust dates.)

Core Templates (Email/DM)

(Use email for formal comms; DM for quick pings. Keep subject lines short.)

1) Kickoff / Onboarding (Day 0)

Subject: Locked in: [Project] for [Brand] ✓

Hi [Name],

Excited to get started! Here's the plan:

- Deliverables: [e.g., 2x 20–30s UGC videos + 1 cut-down each]
- Usage: [3 months organic + 30 days paid for TikTok + Meta]
- Timeline: [Key dates — first preview on DD/MM, final by DD/MM]
- What I need: [Product, brief, do/don't claims, ad specs, drive link]

Quick yes/no: Any extra must-say messages you want included?

Thanks,

[Signature + Portfolio link]

2) Light Check-In (Day 2)

Subject: Anything to add before I roll camera?

Hi [Name], quick one—any last minute talking points, offers, or claims to include?

If not, I'll film to brief and share a preview on [DD/MM].

— [Your Name]

3) 10-Second Preview (Day 7)

Subject: 10-sec peek 👁️

Hi [Name], here's a 10-sec rough of Hook A (no color/sound mix yet).

Gut-check: Does this hook feel on-brand? If you prefer a calmer opener, I have Hook B.

Locking the direction today so we hit final by [DD/MM].

— [Your Name]

(Attach vertical MP4 or Loom link)

4) Delivery + Next Step (Day 14)

Subject: Final files + next steps for [Brand]

Hi [Name], final files are in the folder: [link].

Included:

- [#] x main videos (1080×1920, MP4)
- [#] x cut-downs (10–12s)
- .SRT captions + thumbnail
- Usage recap: [3 mo organic + 30-day paid for TikTok + Meta, starts DD/MM]
- Optional next step (pick one):
- Extend paid usage 30 days → £[amount]/platform
- Add 2 extra hooks for A/B testing → £[amount]
- Schedule quick call to plan [seasonal/event] ideas → [calendar link]
- Great working with you!
- — [Your Name]

5) Micro-Win Value Nudge (Day 21)

Subject: Quick win for your next ad 🧠

Hi [Name], noticed your audience responds to [benefit/angle].

Here's a 15-sec cut-down tailored to that angle: [link].

If you'd like, I can produce two more hooks this week for £[amount] so you can A/B test.

— [Your Name]

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]

8) Renewal / Retainer Offer (Day 60)

Subject: Keep momentum: monthly content options

Hi [Name], if you'd like consistent testing, here are monthly options:

- Lite: 3 videos + 2 cut-downs | 30-day paid usage (1 platform) → £[amount]
- Core: 6 videos + 4 cut-downs | 30-day paid usage (2 platforms) → £[amount]
- Scale: 10 videos + 6 cut-downs | usage (2 platforms) + 10 photos → £[amount]
- I can reserve a priority slot for [Month]. Want me to send a draft SOW?
- — [Your Name]

9) Testimonial + Case Study (any time after good results)

Subject: 2-line testimonial (copy/paste friendly)

Hi [Name], would you be open to a 2-line testimonial? Here are options you can edit:

- “The UGC from [Your Name] cut our CPA by [x%] in week one.”
- “We saw [x]% higher CTR vs. our control. Fast turnaround, on-brand.”

Also, may I quote the metrics in a mini case study? I'll keep it anonymised if preferred.

— [Your Name]

10) Referral Ask (after a win or kind feedback)

Subject: Quick favour?

Hi [Name], if anyone in your network needs UGC, an intro would mean a lot.

To make it easy, here's a 2-line blurb you can paste:

"[Your Name] creates conversion-focused UGC. Smart hooks, fast delivery, and usage handled properly. Portfolio: [link]."

I've got 2 slots open next month. Thank you!

— [Your Name]

11) Dormant Brand Re-Activation (90+ days)

Subject: Re-starting tests for Q[]

Hi [Name], how are things? If you're refreshing creatives for Q[], I can deliver 3 new hooks aligned to [season/new offer]. Same fast turnaround as last time.

Want me to pencil you in for [week]?

— [Your Name]

12) Usage Renewal Reminder (timed to license end)

Subject: Usage renewal for [Asset] (ends [DD/MM])

Hi [Name], the 30-day paid usage for [Asset] ends on [DD/MM].

Renewal options: 1 platform £[], 2 platforms £[], all major £[].

Reply with your pick and I'll invoice today to keep ads uninterrupted.

— [Your Name]

Mini-CRM Fields (paste into Notion/Sheets)

- Brand / Contact / Role / Email / LinkedIn
- Deal status: Lead • In progress • Delivered • Renewal pending
• Retainer
- Deliverables: [type/qty] • Usage: [term + platforms]
- Key dates: Kickoff / Preview / Delivery / Usage end date
- Next action + date (always have one)
- Signals: (fast replies, budget, legal strictness)
- Score (1–5): Keep/sunset
- Notes: wins, objections, preferences

Value-Adds Library (sprinkle, don't smother)

- Bonus cut-down (10–12s) once per brand, unannounced.
- Naming convention cheat-sheet for files (saves their ops time).
- Ad spec card (1080×1920, ≤50MB, .SRT available) to avoid re-renders.
- 3 hook starters tailored to their ICP.
- Usage tracker line in your emails so renewals feel normal, not salesy.

3-Option Renewal Block (paste anywhere)

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

Professional Boundaries (protect the relationship)

- One revision included (script-accurate). Extra rounds £[].
- 50% deposit to book; balance on delivery (files unlock on payment).
- No perpetual paid usage by default; renew monthly or quote 12-month license.
- No competitor exclusivity unless priced (+20–200% depending on scope).

One-Page “Relationship Dashboard” (copy structure)

Columns: Brand | Contact | Last touch | Next action | Deliverables | Usage end | Renewal option | Status | Notes.

Rule: Never leave a brand without a scheduled next action.



RELATIONSHIP BUILDER TEMPLATE

WWW.THEUGCPLAYBOOK.COM