

The SaaS Influencer Campaign Planner: A Step-by-Step Checklist

Phase 1: Infrastructure & Tracking Setup

- ☐ **Define your target revenue milestone:** Explicitly choose whether this campaign targets free trials, Product-Qualified Leads (PQLs), or immediate expansion revenue.
- ☐ **Select your attribution model:** Configure either First-Touch (for short trial-to-paid windows under 7 days), Last-Touch (quick setups), or Multi-Touch (for complex enterprise sales cycles) inside your tracking platform.
- ☐ **Audit your CRM custom fields:** Ensure your CRM has dedicated active fields for "referral source" and "influencer ID" before any creator links go live.
- ☐ **Set up subscription event automation:** Map your affiliate/influencer software to your payment gateway (like PayPro Global) to automate payouts the moment a trial converts to a paid subscription.

Phase 2: Influencer Sourcing & Competitor Auditing

- ☐ **Filter creators by ICP role:** Look past follower counts and verify that the creator's audience consists of active buyers like Founders, CTOs, or Growth Leads.
- ☐ **Run a 90-day competitor YouTube search:** Search for competitor reviews and tutorials, filtering by the last 90 days to see who is actively buying sponsorships.
- ☐ **Map competitor campaign positioning:** Categorize whether competitors are paying for dedicated tutorials (Core Tool Approach) or subtle workflow integrations (Infrastructure Ecosystem Approach).
- ☐ **Audit competitor backlinks:** Use SEO tools (Ahrefs or SEMrush) to search competitor domains for outbound links containing custom creator UTM parameters or coupon codes.

- ☐ **Apply the weighted scoring matrix:** Score potential creators across Audience Alignment (40%), Content Intent (30%), Engagement Quality (20%), and Purchase Signals (10%) before signing contracts.

Phase 3: Partner Onboarding & Campaign Guardrails

- ☐ **Draft a standardized creative brief:** Build a brief template that clearly outlines the core user problem, required features, and the primary call to action.
- ☐ **Lock in the 90-second workflow rule:** Include a non-negotiable term in your contracts requiring the creator to show your product live on screen within the first 90 seconds of the video.
- ☐ **Define negative guardrails:** List specific phrases, competitor comparisons, or legacy tools that the creator must absolutely avoid mentioning.
- ☐ **Issue standardized tracking assets:** Provide each creator with a clean, trackable UTM link and a uniform discount code to keep attribution clean.

Phase 4: Content Structure & Landing Page Optimization

- ☐ **Enforce the Problem-Setup-Outcome workflow:** Ensure the creator structures their video to show a painful manual process (0–2 mins), your software solving it (2–7 mins), and the polished final result (7–10 mins).
- ☐ **Build custom matching landing pages:** Ensure the landing page copy explicitly mirrors the messaging and visual identity used by the influencer.
- ☐ **Align page friction with creator audience:** Use low-friction 1-click signups for high-volume creator traffic, and use more detailed, technical use-case documentation pages for niche developer audiences.
- ☐ **Incorporate social proof on landing pages:** Embed video snippets of the creator using the product or display relevant technical documentation depending on the cohort.

Phase 5: Cohort Testing & Scaling

- ☐ **Group creators into distinct cohorts:** Segment your active partners into specific thematic groups (e.g., DevOps, Indie Hackers, Growth Marketers).
- ☐ **Run a 60-day performance window:** Collect signup and conversion data for each cohort over a strict two-month period.
- ☐ **Calculate your Cohort Performance ROI:** Use the tracking formula: $(\text{Total ARR Generated by Cohort} / \text{Total Cost of Cohort Partnerships}) * 100$ to identify your most profitable segments.
- ☐ **Double down on top-performing micro-influencers:** Transition the creators with the highest trial-to-paid conversion rates into long-term brand ambassadors.
- ☐ **Troubleshoot conversion leaks:** If trials are high but payments are low, audit your in-app onboarding; if traffic is low, revisit your creator-to-landing-page messaging alignment.