

CONTENT CREATION · CONTENT STRATEGIST

YouTube Channel Build Checklist

A short guide to deciding whether a client should have a channel, and if so what it is for, what goes on it, and how often. The first section talks some readers out of it.

THE DECISION THIS TEMPLATE PROTECTS

Whether this client should build a YouTube presence at all, and if so, what job it does.

ROLE Content Creation · shared with Social Media	COURSE PLACEMENT Main Course Module 3 · Channel and format strategy	REVISION Version 1.0 Current as of 19 August 2026
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Work section zero honestly before anything else. Most agency YouTube proposals fail at the capacity question and nobody asks it until year two. If the client clears section zero, the rest of the checklist is a sequence, not a menu.

BEFORE YOU START, YOU NEED

- An honest read of the client's subject-matter supply and production capacity.
- Whether the buying decision involves research.
- A budget conversation that assumes twelve months, not three.

01 Section zero · Should this client have a channel?

Four disqualifiers. Any one of them ends the exercise, and ending it is the service.

DISQUALIFIER	TEST	PRESENT?
No sustainable subject-matter source	Can somebody credible give two hours a month for a year?	

DISQUALIFIER	TEST	PRESENT?
No production capacity	Can they ship consistently at an acceptable standard?	
The buying decision involves no research	Do buyers ever look things up before choosing?	
The budget assumes results inside two quarters	Has anyone said the word 'viral' yet?	

If a disqualifier is present, recommend against and say why in writing. A channel abandoned after seven videos costs more than the money: it is a public record of something the client gave up on.

02 One • The channel's job

Pick one. A channel serving three jobs serves none, and the tell is a channel whose videos have no relationship to each other.

JOB	WHAT SUCCESS LOOKS LIKE	CHOSEN?
Demand creation	People who did not know they had the problem	
Objection handling	Fewer stalls in the sales conversation	
Trust proof	Prospects arrive already convinced of competence	
Support deflection	Measurably fewer repeat support questions	
Talent attraction	Better applicants who already understand the work	

03 Two • Content archetype mix

Derived from the job, not from what is trending. Three archetypes, in a deliberate ratio.

ARCHETYPE	WHAT IT DOES	SHARE	EXAMPLES FOR THIS CLIENT
Searchable	Answers a question people type. Compounds slowly, lasts		
Subscriber-serving	Serves the people who already follow. Builds relationship		

ARCHETYPE	WHAT IT DOES	SHARE	EXAMPLES FOR THIS CLIENT
Reach	Occasional, discovery-oriented. Unreliable by design		

04 Three • Frequency, derived not chosen

The question is not how often to post. It is the fastest cadence this client can hold for a year without the quality collapsing.

INPUT	REALITY
Hours of expert time available per month	
Production hours available per month	
Approval turnaround	
Topics currently in the bank	
Derived cadence	

Halve the number you first arrive at, then commit to it. Channels die from missed weeks, not from slow ones.

05 Four • The unglamorous eighty per cent

Most channels fail on packaging and the opening, not on production value. Budget attention accordingly.

- **The title is a promise.** Write it before the video, and if you cannot, the video has no point yet.
- **The thumbnail is the same promise, visually.** It should be legible at the size of a thumbnail, which is the only size it will ever be seen at.
- **The first thirty seconds delivers on the promise** rather than introducing the brand.
- **The video pays off the title.** A gap between promise and delivery is punished immediately and permanently.

FOR THE NEXT THREE VIDEOS, WRITE THE TITLE FIRST

06 Five • Format and cost floor

FORMAT	COST PER VIDEO	SUSTAINABLE AT OUR CADENCE?	SUITS OUR JOB?
Talking head			
Screen recording or walkthrough			
Edited with b-roll			
Interview or conversation			

Match format to capacity, not to aspiration. A consistent talking-head channel beats a beautifully produced one that stops in March.

07 Six • Review gates

GATE	WHAT WE WILL LOOK AT	CONTINUE IF	CHANGE IF	STOP IF
Day 90				
Day 180				
Day 365				

Agree the stop condition at the start, in writing. It is much harder to agree one at month eight, when somebody's reputation is attached.

JUDGMENT PROMPTS

1.

If the client's most knowledgeable person left tomorrow, does this channel survive?

2.

Is the chosen job the one the client wants, or the one you can measure?

3.

Are you recommending a channel because it is right, or because it is a large line item?

WHAT THIS TEMPLATE WILL NOT DO FOR YOU

- It will not make a channel grow. Nothing on paper does.
- It will stop you building one that was never going to work, which is worth considerably more than it feels like at the time.
- It does not cover production craft, editing, or paid promotion of video.
- Platform discovery behaviour changes. Check the review date on this document before relying on section two.

THE DEFENSIBLE OUTPUT

A go or no-go recommendation in writing, and if go, a one-page channel charter naming the job, the mix, the derived cadence and the stop condition.

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