

# YouTube Strategy Playbook for Finance Educators

Find the money questions people already search, copy the title pattern that beats channel averages, plan 30 days. Fill the bracketed prompts.

## 1. Your channel on one page

Fill this before anything else. Every other section refers back to it.

### Who you teach

*[e.g. first-job earners who want to invest \$200 a month]*

### The money moment they hit before they search

*[e.g. first paycheck, first budget, a raise, a job loss]*

### The three topics you explain better than anyone

*[e.g. budgeting on a low income, index funds, tax on side income]*

### Your compliance line

*[what you never promise in a title, e.g. returns, dates, specific products to buy]*

### Current channel average views (last 20 videos)

*[number; this is the baseline every result is measured against]*

### Where a viewer goes next

*[newsletter, course, calculator, community; one link per description]*

## 2. Why finance channels stall

- Teaching in syllabus order: lesson seven gets 3% of lesson one's views because YouTube ignores the order.
- Generic or promotional titles: how to invest competes with a million videos; why gold now reads as a pitch.
- Hedging into invisibility: compliance fear produces vague titles. The fix is a specific educational promise, which is both clearer and safer than a return promise.

## 3. The five steps

### 1. Find the demand by money moment

In OutlierKit Outliers, search the moment (first paycheck, over 50, low income, inheritance), not the topic. Keep videos above 5x their channel average. Write down the exact words in each winning title.

### 2. Pick the format that beats averages at your size

Three formats win in finance: the step-count breakdown, the number-in-title explainer, and the market-event reaction. Filter the outliers to channels near your subscriber count. The format that repeats three times is yours.

### 3. Copy the hook, keep the promise educational

Swap only the nouns in the three best titles. Beginner, step count and constraint (low income, in your 20s, over 50) carry the click. Confirm the phrase in Keyword Research. Promise understanding, never a return.

### 4. Fill 30 days

Two evergreen breakdowns a week from the demand list, plus one reaction slot held open every two weeks for whatever the market does. Deep Research drafts the first ten titles from your outlier list.

## 5. Measure by reach ratio and comments

After seven days, compare views to your channel average. Repeat anything above 2x. Read the comments: in finance the next video's topic is a question under the last one.

## 4. Title patterns to copy

Verified pattern from the session data: [money task] for complete beginners, with a step count or a constraint. Three channels (1,450, 25,000 and 88,200 subscribers) got 14.2x, 23.6x and 6.2x their normal views from it.

- Budgeting for beginners: take control of your money step by step
- How to save and budget as a beginner ([year] money reset)
- How to start managing your money: 6 steps for complete beginners
- Starting from zero: how to begin your savings journey on a low income
- The [rule or number] explained for [audience]

[illegible]

## 5. 30-Day Calendar for Finance Educators

Two evergreen breakdowns a week, one market-event reaction slot held open every two weeks. Fill the Result column; it is what makes this a strategy.

[illegible]

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Appendix: prompt pack for Claude with the OutlierKit connector

Paste each prompt into Claude with the OutlierKit connector switched on (Pro or Max plan). Replace everything in square brackets.

Demand scan by money moment

I teach [topic] to [audience]. Use OutlierKit to find finance videos from the last 60 days with an outlier score above 8 about [money moment, e.g. first paycheck]. List the top 10 with channel size and multiplier, and tell me which title words repeat.

Tools Claude calls: outliers\_search. Cost: about 2 credits.

Comment mining for the next topic

Pull the comments on these 3 videos: [URLs]. Summarize the 5 questions viewers ask most, in their own words, and turn each into a video title that promises understanding, not a return.

Tools Claude calls: videos\_comments. Cost: about 3 credits.

Title rewrite in the beginner pattern

Here are my last 10 video titles: [titles]. Rewrite each in the pattern [money task] for complete beginners with a step count or a constraint, and flag any that would make a compliance promise.

Tools Claude calls: keywords\_research. Cost: about 1 credit.

Channel benchmark

Compare my channel [URL] with [competitor URL] and [competitor URL] in OutlierKit: average views as a share of subscribers, top 3 outliers each, and the format those outliers share.

Tools Claude calls: channels\_get, channels\_videos. Cost: about 6 credits.

Fill the calendar

Using the outlier list above, write 8 titles for the next 30 days: 6 evergreen breakdowns and 2 market-event reactions I can film the same week something happens. Give each a primary keyword and the outlier it copies.

Tools Claude calls: outliers\_search, keywords\_research. Cost: about 3 credits.