

HOW TO

CREATE AN ONBOARDING PROCESS

.....
8 STEPS TO SUCCESS

01

Welcome Partners to your
Partner Program

02

Host a Kick-Off Call

03

Develop a Partner Business
Plan

04

Establish Goals & Benchmarks
on a Firm Timeline

05

Train Your Partner

06

Provide Easily Accessible
Sales & Marketing Resources

07

Hand Off Leads & Jointly
Work Sales Opportunities

08

Track & Measure Success