Partner Onboarding Checklist

1. Initial Engagement

- [ ] Welcome packet sent to new partner.
- [ ] Kick-off call scheduled.
- [ ] Introduction to the company, products/services, and partnership program.

2. Access to Partner Portal (If using PRM)

- [ ] Login credentials provided.
- [ ] Tour of portal's unique features.
- [ ] Highlight available resources: product documentation, marketing materials, training modules, and sales collateral.
- [ ] Introduction to interactive tools: lead management system, sales forecasting tools, communication channels.
- [ ] Guide on customization options for their dashboard.

3. Comprehensive Partner Onboarding Program

- [ ] Detailed plan for the first 30 days.
- [ ] Share the expectation that partners will act as an extension of your sales team.
- [ ] Outline instructive partner sales training modules.
- [ ] Provide details of the dedicated partner program: guidelines, objectives, benefits, roles, and responsibilities.

4. Documentation & Data Exchange

- [ ] Provide complete and up-to-date documentation.
- [ ] Introduction to the data exchange process and systems.
- [ ] Test data exchange to ensure seamless integration.

5. Customized Portal Experience (If using PRM)

- [ ] Guidance on where to start on the portal.
- [ ] Schedule for training and certification courses.
- [ ] Contact information for support: channel managers, sales reps, marketing reps, back-office staff, finance team.
- [ ] Schedule follow-up meetings.

6. Actionable Training & Sales Content

- [ ] Introduction to B2B audience personas.
- [ ] Access to product demos and sales battle cards.
- [ ] Share product case studies.
- [ ] Provide content templates: emails, blogs, social media, contracts, videos.
- [ ] Schedule quizzes to reinforce learning.

7. Objectives & Benchmarks

- [ ] Define milestones in the partner's business plan.
- [ ] Set dates associated with these milestones.
- [ ] Plan actions to achieve these objectives.

8. Lead Transfers & Joint Sales Opportunities

- [ ] Outline the process for transferring leads.
- [ ] Schedule collaboration sessions on initial deals.

9. Channel Performance Metrics

- [ ] Provide pipeline activity metrics.
- [ ] Share enablement engagement metrics.
- [ ] Active, pending, and inactive partner metrics.
- [ ] Access to sales data analysis.
- [ ] Introduction to end-client engagement metrics.

10. Rewards & Recognitions

- [ ] Detail the rewards program for onboarding achievements.
- [ ] Schedule for delivering rewards: gift cards, event invitations, merchandise.

11. Regular Check-ins

- [ ] Schedule regular meetings to address questions and concerns.
- [ ] Track progress: training courses completion, portal engagement, etc.

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