



PARTNER ONBOARDING (SAMPLE)

Please name this process: Partner Name-Company Name-Date.For instance: Walt Disney-Disney Inc.-06/25/2019

Prospect Name (Required)

Company Name, if associated with a company

Job Title/Position

1 Determine channel of inquiry

Determine how this inquiry was submitted by:

Prospect Name:

[Prospect Name]

Company Name:

[Company Name, if associated with a company]

Title:

[Job Title/Position]

Channel of inquiry (Required)

- ☐ Partner inquiry form on website
- ☐ Email/Phone call

Notes from inquiry

2 Send partner application form

Following is the latest version of partner application form. Please upload it to Google Drive and share access to the form with the applicant.

Insert link to filled-in application form (Required)

3 Review application

Please review partner application for the following applicant:

Prospect Name:

[Prospect Name]

Company Name:

[Company Name, if associated with a company]

Title:

[Job Title/Position]

Link to application:

[Insert link to filled-in application form]

Tentative meeting date and time

Points/questions to discuss in the meeting

4

Schedule meeting to determine fit for partnership

Please meet with the applicant to determine fit for partnership

Date and time of the meeting

Enter Meeting Link

5 Approve application

Determine if this applicant is a good fit for partnership.

Does this prospect fit the requirements? (Required)

- ☐ Yes - please prepare partner agreement
- ☐ No - can't accept as partner, see notes below

Notes

6 Send email to prospect stating reasons for rejection

 If Step 5: Approve application > Field: Does this prospect fit the requirements? is No - can't accept as partner, see notes below then show this task

Please refer to notes below and send email to applicant stating reasons for turning down the application:
[Notes]

7 Send partner agreement to partner

 If Step 5: Approve application > Field: Does this prospect fit the requirements? is Yes - please prepare partner agreement then show this task

Following is the latest version of partner agreement. Please upload it to Google Drive and share access to the form with the applicant.

Upload link to partner agreement (Required)

8 Request approval on partner agreement

 If Step 7: Send partner agreement to partner is completed at any time then show this task

Kindly review and approve the following partnership agreement:
[Upload link to partner agreement]

Enter approval information (Required)

- ☐ Approve
☐ Request changes

Notes

9 Review feedback and update agreement

 If Step 8: Request approval on partner agreement > Field: Enter approval information is Request changes then show this task

Review feedback from partner below and update the partner agreement here:
[Notes]

Link to agreement:

[Upload link to partner agreement]

10 Send agreement to partner for signature

 If Step 8: Request approval on partner agreement > Field: Enter approval information is Approve OR

If Step 9: Review feedback and update agreement is completed at any time then show this task

Send final version of agreement to partner for acknowledgement and signatures.

[Upload link to partner agreement]

11 Send signed agreement to Director for signature

 If Step 10: Send agreement to partner for signature is completed at any time then show this task

Send agreement to Director for counter-sign:

[Upload link to partner agreement]

12 Send introduction and reference material to partner

 If Step 11: Send signed agreement to Director for signature is completed at any time then show this task

This step will introduce the new partner to the company's, product's/service's working. Please forward all reference materials to help partner educate about the competitive advantages of the product/service.

Checklist for task (Required)

- ☐ Company and culture information
 - ☐ Product/services information
 - ☐ How to refer a client and inform the company
 - ☐ Other resources and FAQs
-

13 Set up tool accesses for new partner

🔗 If Step 12: **Send introduction and reference material to partner** is completed at any time then show this task

This step will help set partners up to tools they would require for business management, marketing and communications, deal/accounting management, receiving partner incentives etc.

Checklist for task

- ☐ Set up Email account
 - ☐ Set up access account for product/service
 - ☐ Set up access for promoter/partner reward/incentives
 - ☐ Introduce direct account manager personnel
-

14 🔗 Complete 1 month check-in with partner

🔗 If Step 13: **Set up tool accesses for new partner** is completed at any time then show this task

Conduct a 1 month feedback task to gauge partner's progress, queries, concerns, challenges faced and take necessary actions to make this partnership a successful association .

Checklist

- ☐ Check list of referrals
- ☐ Check if partner earnings are forwarded
- ☐ Gaps in understanding in delivery of service
- ☐ Any other concerns

Notes
