

Plan the programme and the first steps

Use one copy per partner programme. Tick when complete; record an owner and date for unresolved items.

Programme / partner type:

Programme owner / review date:

Target outcome / onboarding readiness milestone:

01 Define the programme and responsibilities

- ☐ Identify partner types, target customers, territories and the support each group needs.
- ☐ Agree programme objectives and define what partners must complete before they are ready.
- ☐ Assign owners for onboarding, training, content, partner communication and escalation.

02 Build a clear onboarding journey

- ☐ Map application, approval, agreements, account access, introductory learning and first activity.
- ☐ Provide a welcome guide, essential contacts, clear next steps and realistic target dates.
- ☐ Assign a task owner to each step and agree how stalled partners will be followed up.
- ☐ Test the journey with someone unfamiliar with the process, including on a mobile device.

Prepare resources, learning and access

Keep information relevant to each partner group. Confirm platform capabilities before relying on automation.

03 Organise approved partner resources

- ☐ Publish product guides, customer-fit criteria, positioning, approved pricing guidance and FAQs.
- ☐ Provide pitch materials, demo guidance, case studies and approved marketing templates.
- ☐ Give each resource an owner, review date and clear current version; retire superseded copies.
- ☐ Group resources by partner type or task, and test whether a new partner can find them.

04 Deliver learning and control access

- ☐ Define role-specific learning paths; use assessments or practical checks where appropriate.
- ☐ Set certification and renewal requirements only where needed; assign a training owner.
- ☐ Confirm group permissions, sign-in requirements and a process for removing partner access.
- ☐ Check CRM and learning integrations, data ownership, sync failures and export options.

Content / training owner and next review:

Open questions / missing resources:

Launch, engage and review progress

Use the results to improve the programme. Access and downloads alone do not demonstrate partner readiness.

05 Establish ongoing communication and support

- ☐ Agree an update schedule for product changes, pricing, campaigns and important announcements.
- ☐ Make support contacts, response expectations and escalation routes easy for partners to find.
- ☐ Schedule check-ins and collect feedback on unclear steps, missing content and support needs.

06 Measure readiness and improve the programme

- ☐ Record completion time, completion rate and delays by step for comparable partner groups.
- ☐ Review assessment results, common support questions and time to first meaningful activity.
- ☐ Define that activity by partner type: accepted referral, registered opportunity or integration submission.
- ☐ Review results with programme owners; assign each improvement an owner and due date.

Launch decision: [] Ready [] Resolve gaps first [] Rework the plan

Priority gap / next action / owner / due date:

Suggested review: after the pilot, then at agreed intervals. Tailor timing to your partner journey.
