

Use this blueprint to track and manage partner onboarding process. With a few changes, this blueprint can also be used to onboard vendors or affiliates.

Following document showcases the details of this blueprint:

[Blueprint - PARTNER ONBOARDING \(SAMPLE\).pdf](#)

PARTNER ONBOARDING (SAMPLE)

Please name this process: Partner Name-Company Name-Date.

For instance: Walt Disney-Disney Inc.-06/25/2019

If you wish to review the details of this blueprint before you launch it, here is the blueprint in detail:

[Blueprint - PARTNER ONBOARDING \(SAMPLE\).pdf](#)

Prospect Name (Required)

Company Name, if associated with a company

Job Title/Position

1 Determine channel of inquiry

Assignees:

Process Starter

Deadline:

1 day after a process is launched

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

Enter link to partner application form (Required)

Notes from inquiry

2 Send partner application form

Assignees:

Process Starter 

Deadline:

1 day after Step 1: Determine channel of inquiry

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

[Partner Application](#)

OR

Use this as a template to send application form to partner:

Hi **[Prospect Name]**,

Thank you for your interest in representing our company.

Kindly fill the application form and provide us more details on your background:

[Enter link to partner application form]

We look forward to hearing from you.

Kind Regards,
Partner Discovery and Management

Insert link to filled-in application form (Required)

3 Review application

Assignees:

Process Starter

Deadline:

3 days after Step 2: Send partner application form

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

Assignees:

Process Starter

Deadline:

2 days after Step 3: Review application

Meet with the applicant to determine fit for partnership

Date and time of the meeting

Enter Meeting Link

5 Approve application

Assignees:

Process Starter

Deadline:

2 days after Step 4: Schedule meeting to determine fit for partnership

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

Assignees:
Process Starter 
Deadline:

1 day after Step 5: Approve application

Dear **[Prospect Name]**,

Thank you for your interest in partnering with us. After careful review of your application, we are sorry to let you know that we are not able to accept your application request for the following reasons:

[Notes]

We wish you best in your future endeavours.

Kind Regards,
Partner Discovery and Management Team

7 Send partner agreement to partner

Assignees:
Process Starter

Deadline:
2 days after Step 5: Approve application

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

[Referral-Partner-Agreement-Template.docx](#)

Upload link to partner agreement (Required)

8 Request approval on partner agreement

Assignees:
Process Starter

Deadline:
1 day after Step 7: Send partner agreement to partner

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

Assignees:

Process Starter

Deadline:

2 days after Step 8: Request approval on partner agreement

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****Assignees:**Process Starter **Deadline:**

3 days after Step 8: Request approval on partner agreement

Dear [Prospect Name],

Please review the final version of partner agreement:

[Upload link to partner agreement]

11  **Send signed agreement to Director for signature****Assignees:**Process Starter **Deadline:**

2 days after Step 10: Send agreement to partner for signature

Send agreement to Director for counter-sign:

[Upload link to partner agreement]

12  **Send introduction and reference material to partner****Assignees:**Process Starter **Deadline:**

2 days after Step 11: Send signed agreement to Director for signature

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

Assignees:

Process Starter

Deadline:

2 days after Step 12: Send introduction and reference material to partner

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

Assignees:

Process Starter

Deadline:

1 month after Step 13: Set up tool accesses for new partner

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
