

PARTNERSHIPS & ECOSYSTEM · PLAYBOOK

Partner Onboarding Toolkit

For partnerships and channel leaders onboarding referral, reseller, implementation, or ecosystem partners in their first 90 days.

How to use this: Select the partner type below, follow the milestone sequence for the first 90 days, and assign a named internal owner to drive each stage.

Partner Onboarding Snapshot

Partner name and type:

Internal owner responsible for driving this partner through onboarding:

Target date for first activity (introduction, deal, or implementation):

Onboarding Inputs by Partner Type

Confirm the partner has received what they specifically need to start, based on their type.

Partner Type	Required Input	Delivered? (Y / N)	Date Delivered
Referral	Concrete ideal customer profile + feedback loop after introductions		
Reseller	Product training, pricing / margin clarity, named responsive contact		
Implementation	Product access, certification path, real project examples		
Technology / Ecosystem	Technical docs, sandbox/API access, shared joint value story		

First 90 Days Milestone Checklist

- ☐ Kickoff call completed with clear roles named on both sides
- ☐ Enablement materials delivered and confirmed received (not just sent)
- ☐ First prospect or account identified by name
- ☐ First customer-facing conversation or activity completed
- ☐ First deal, introduction, or implementation milestone reached
- ☐ 30/60/90-day check-in calls scheduled in advance, not scheduled reactively

Check-In Log

Track milestone-focused check-ins, not general relationship calls.

Date	Milestone Discussed	Blocker Identified	Next Action

90-Day Outcome Review

Did the partner reach their first meaningful activity within 90 days?

If not, what specifically stalled: missing materials, missing capacity, or missing internal follow-up?

What will we change about onboarding for the next partner of this type?
