

PARTNERSHIPS & ECOSYSTEM · TEMPLATE

Referral / Channel Motion Planner

For growth and partnerships leaders designing a simple, low-friction partner-sourced pipeline motion before building tooling around it.

How to use this: Design the mechanics of the motion in each section below, run it manually for the first 10-20 referrals, then use the review section to decide what's worth building.

Motion Basics

What type of motion is this: referral, co-sell, or reseller-led channel?

Who is the target partner audience for this motion, specifically?

What is the single action we're asking a partner to take?

Minimising Partner Effort

Check off each item to confirm the motion is as low-friction as possible before launch.

- ☐ The referral action requires no new login or portal for a first-time referral
- ☐ There is a single, memorable way to refer (a link, an email alias, or an intro instruction)
- ☐ A partner could complete the action in under two minutes
- ☐ The reward and terms are stated clearly and in advance, not negotiated after the fact
- ☐ There is a named internal owner who personally follows up within 48 hours of any referral

Reward Structure

Trigger Event	Reward	When Paid	How Partner Is Notified
Referral submitted			
Referral converts to paying customer			
Customer renews / expands (if applicable)			

Manual Process (First 10-20 Referrals)

Describe exactly how this will run by hand before any tooling is built.

How will referrals be captured and tracked internally during this manual phase?

Who personally confirms receipt with the partner, and within what timeframe?

Who updates the partner on status, and how often?

Early Review

Complete after the first 10-20 referrals to decide what's worth building next.

Where did partners get stuck, confused, or go quiet in the actual process?

What is the single biggest friction point observed?

What, if anything, is now worth formalising into a tool or dashboard?
