

PARTNERSHIPS & ECOSYSTEM · TEMPLATE

Partner Review Template and Cadence Planner

For partnerships and channel leaders running structured, recurring reviews of active partners instead of assessing health only at renewal time.

How to use this: Assign each partner to a tier, set their review cadence, and use the standard review template below every time a review is run.

Partner Tiering

Assign every current partner to a tier based on current performance and strategic value.

Partner Name	Tier (Strategic / Active / Long-Tail)	Review Cadence	Last Review Date

Standard Review Agenda

- ☐ Review trailing metrics: referrals, deals sourced, revenue, or implementations completed since last review
- ☐ Confirm whether the original partner champion is still engaged, and identify a backup contact
- ☐ Discuss any competitive products or changes to the partner's portfolio or priorities
- ☐ Surface any blockers on either side that haven't yet shown up in the numbers
- ☐ Agree on specific commitments for both sides before the next review
- ☐ Confirm the next review date before ending the call

Leading Indicator Check

Answer honestly, separate from the trailing metrics above.

Is partner activity trending up, flat, or down relative to the prior review?

Has the partner's enthusiasm in conversation been matched by actual behaviour this period?

Is there any emerging risk (champion change, competing product, pricing shift) not yet visible in the numbers?

Underperformance Escalation

Use when a partner has underperformed for two or more consecutive review periods.

What specifically has underperformed, stated plainly and with numbers?

What has already been communicated to the partner about this, and when?

What is the agreed path forward: reset expectations, adjust the plan, or wind down the relationship?

What is the deadline for seeing improvement before the next decision point?

Annual Cadence Calendar

Lock in review dates for the year at once rather than scheduling reactively.

Scheduled quarterly reviews (strategic tier) for this year:

Scheduled monthly/bi-monthly check-ins (active tier) for this year:

Scheduled semi-annual health checks (long-tail tier) for this year:
