How to Create a Channel Partner Onboarding Program to Gain and Retain Loyal Partners

Despite the Herculean effort your channel team has made to identify new ideal channel partners — continuously scouring contact lists, referral networks and online watering holes — the work has only just begun. You now need to onboard these new partners into your channel program, so they can become the revenue-generating machines you've imagined.

What is Channel Partner Onboarding?

Channel partner onboarding is the process of introducing and assimilating new partners into your company's partner program. At the very least, channel partner onboarding typically includes business planning, sales and technical training, systems integration, marketing support and lead generation, and co-selling. These activities are accompanied by periodic check-ins, quarterly business reviews (QBRs), and partner progress assessments in reaching agreed-upon milestones.

Why is Channel Partner Onboarding Important?

Learning how to recruit channel partners successfully is a challenging endeavor. You'll only spoil the fruits of your labor by delivering a lackluster partner onboarding experience. Instead, give it the attention it deserves. How? The 10 seasoned channel business leaders we surveyed about their work in the trenches of partner onboarding identified eight specific steps:

1 Welcome Partners to Your Partner Program

There are no second chances when making first impressions, so set the tone with a warm welcome for your new partner. Proactive communication and engagement are essential throughout onboarding, and our panel recommends creating a professional partner welcome kit — including elements like a welcome letter, onboarding checklist, solutions overviews, partner portal instructions and FAQs — as your first important touchpoint.

2 Host a Kick-Off Call

After sending the welcome kit to your new partner, you'll want to host a kick-off call to set the stage and ensure everyone is on the same page. Getting day-one buy-in from key stakeholders in the partner organization is paramount. Bring in executives from both companies to the call; their attendance and attention communicate how much you value the partnership. And don't assume your partner has read the welcome kit. Instead, go through it together as if they're seeing it for the first time.

3 Develop a Partner Business Plan

Developing a joint business plan with your partner begins with discovery: It's important to get under the hood of your new partner's company so that you understand their capabilities, resources and go-to-market motions and, more importantly, where their organization performs well and where it has gaps. This baseline information is essential to mapping a path for the partner to become an autonomous selling machine.

4 Establish Goals & Benchmarks on a Firm Timeline

As part of building a partner business plan, milestones must be set and tied to dates. Once you have a solid timeline, you and your partner will understand the pace for ramping up sales and what resources are required from both sides to reach agreed-upon goals. In fact, joint business planning is the leading indicator of success for channel partnerships, but other KPIs matter, too, including participation in technology or sales and marketing training, attendance at your events or webinars, engagement with the portal, number of campaigns sent (if supported in the portal), number of demos or proofs of concept performed and number of deals registered.

5 Train Your Partner

Once you've got the partner business plan and timeline finalized, you're now at the point where you need to train your partner. A word of caution here — don't take your foot off the gas just because the plan is done. Multiple people at the partner organization need to understand your products, solutions and business processes so they know how, when and why to pitch your company to their customers. Ultimately, your channel business model will determine the required training: If you're offering white-label services, for

> *Streamline the onboarding process and try not to overwhelm partners. Keep in mind they already have a business to run, so they can't drop everything and focus on you.*
>
> **Patrick Sheehan**
> Senior Director of Field Channel Sales ▪ Intermedia

example, your partner may need extra technical certification training so they can onboard customers and diagnose and resolve customer problems on their own.

6 Provide Easily Accessible Sales & Marketing Resources

Hallmarks of successful channel partner programs include an abundance of partner-ready sales and marketing assets. Some classic examples include: Fast and accurate quoting tools, responsive and available channel managers and sales engineers, brandable sales collateral (flyers and datasheets), battlecards with comparisons to the competition, pitch decks/presentations, demo videos, sample proposals and more. It's vital that these resources not only exist, but that they are easily accessible and brandable via a self-service portal, so your partners can leverage them as needed.

7 Hand Off Leads & Jointly Work Sales Opportunities

Yes, you read that right. Send opportunities to your partner as early as you can in your partnership. You might be thinking, "Isn't my partner supposed to bring leads and deals to me? Isn't prospecting their responsibility?" Yes, the goal is to eventually get them to sell independently most of the time, but the odds are that they're going to need help selling your solution and getting a few wins under their belts.

8 Track & Measure Success

Once your partner is out in the wild, hunting down deals and handling the sales process more independently as months go by, it's time to begin assessing the success of your partnership. At a high level, partner scoring involves classifying partners by how they fit into SiriusDecisions' "five "Cs": *Coverage* – partner access to buyers in targeted markets; *Compatibility* – partner alignment with your company's business model/portfolio; *Capability* – partner departments have the abilities, skills and experience to function and pull in business; *Creditworthiness* – partner long-term financial viability; *Capacity* – partner ability to reach revenue targets and workforce to sell.

There you have it — eight must-have steps in the partner onboarding process. Download our onboarding process flowchart .PDF here to use as a channel partner onboarding template when creating your own model.

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