The Partnership Manager Training Plan

ABOUT THIS TEMPLATE: This template can be used by Partner Org Team Leaders who want to get their new hires quickly up to speed, or New Partner Managers who want to know where to start. Work with your manager to fill out this plan.

HOW TO USE THIS TEMPLATE: 1 - Go to the top left menu > File 2 - Make a copy > rename your document.

First, fill out the high level details here

Welcome to COMPANY NAME

- You are part of the TEAM NAME
- We are part of the ORG NAME
- Your Executive Leaders are EXEC NAMES
- Your MANAGER is MANAGER NAME
- Your BUDDY is BUDDY NAME

This document is designed to compliment your onboarding courses and meetings

Content

1. 30/60/90 Action Plan
2. Stakeholders Meetings
3. OKRs and Strategy Docs
4. Tools and Resources

30/60/90 Action Plan

Customize these steps

Within your first 30 days:

- [ ] Take the [How to Build A High-Impact Partner Program] (https://www.reveal.co/building-a-high-impact-partner-program/introduction) course
- [ ] Map out your Stakeholders and book intro meetings

Complete your company onboarding

- [ ] Attend the annual/quarterly sales kickoff
- [ ] Pitch Certification
- [ ] Product Certification
- [ ] Shadow #X of calls with Partners

Admin

- [ ] Get a Partner Profile setup for you on the CRM
- [ ] Get added to all the relevant team meetings
- [ ] Get added to the relevant Slack channels
    - [ ] #team
    - [ ] #external-partner-channel
    - [ ] #partners-all

Within your first 60 days:

- [ ] Take the Account Mapping Playbook course
- [ ] Take the Measuring Partnership Success course
- [ ] Run a 360° ecosystem mapping for your company
- [ ] Define your OKRs / Goals

Audit the current partner program

- [ ] Use the Partner Program checklist template

Check in meetings

- [ ] YOUR MANAGER
- [ ] YOUR BUDDY

Partner strategy meetings

- [ ] Run account mapping on [Reveal](), or [here's a basic template]()

Within your first 90 days:

- [ ] Set up one place for tracking Partnership pipeline
- [ ] Check in with YOUR MANAGER

Nail some quick wins

- [ ] Run a report on top Prospects that are your Partner's Customers, or biggest Open Opportunities that are your Partner's Customers - share with your Sales Leaders offering to set up AE to AE intro calls.
- [ ] Highlight where intel from a partner has helped progressed / closed a key deal in the next All Hands.
- [ ] Set up a partner update service for AEs to subscribe to if they are interested in knowing this information for their accounts.
- [ ] Connect with your partners on Reveal and screenshot overlap data from your Overviews page to paste into your next QBRs.

Stakeholder Meetings

Add the key stakeholders below

Name	Role	Relationship	Getting connected
Example: John	Partner Manager	New Hire Buddy, team mate	Op 1: I setup a meeting for you Op 2: Step up this meeting when you can Op 3: This person will setup a meeting for you

OKRs and Strategy Docs

Add your links below

- Team OKR
- Company OKR
- Team Strategy Doc
- QBR Doc

Tools and Resources

Add your links below

Resources

- *List any communities* — like Partnership Leaders, or The Society
- *List any Podcasts* — like The Partnered Podcast
- *List any blog articles* — like from the Reveal blog
- How to get a 360° ecosystem mapping

Your Tech Stack

- [ ] Account Mapping tool like Reveal
- [ ] PRM
- [ ] Optional: Partner portal

Templates

- [ ] Workstream Tracker Template
- [ ] Partner Scorecard Template
- [ ] QBR Deck Template
- [ ] Account Mapping quick start