

Partner-First Program Diagnostic

Evaluate how well your program supports partner action, manageable operations, revenue follow-up, and credible performance evidence. Use your results to identify the first area to strengthen as you build a more connected, partner-first program.

How to Score

Rate each statement from 0 to 3.

0**Not in Place**

The program doesn't have a consistent approach.

1**Manual**

The work happens, but it depends on individual effort or knowledge.

2**Defined**

A process exists on paper, but adoption and visibility are hit-or-miss.

3**Operational**

The approach is repeatable, visible, and connected to a clear next action.

Categories

Partner Experience**Program-Team Operating Load****Revenue Handoff****Performance Evidence**

OPERATING AREA 1

Partner Experience

A true partner-first program focuses on what partners actually need to execute, not just what your team wants to push out.

SCORE EACH STATEMENT 0-3

0 = Not in Place 1 = Manual Effort Needed 2 = Defined Process Exist 3 = Operational

1

Partners can quickly find the right campaign, program, or next action.

0	1	2	3
☐	☐	☐	☐

2

Expectations, deadlines, and expected outcomes are crystal clear before launch.

0	1	2	3
☐	☐	☐	☐

3

Partners can move from interest to action without navigating unnecessary systems or handoffs.

0	1	2	3
☐	☐	☐	☐

4

Enablement is connected to the task the partner is trying to complete.

0	1	2	3
☐	☐	☐	☐

SECTION SUBTOTAL
0 / 12

Reflection

Where are partners hitting unnecessary speed bumps or wasted effort?

OPERATING AREA 2

Program-Team Operating Load

Success shouldn't depend on your team manually duct-taping every workflow together.

SCORE EACH STATEMENT 0-3

0 = Not in Place 1 = Manual Effort Needed 2 = Defined Process Exist 3 = Operational

1

Standard processes drive recurring work—no reinvention required for each new launch.

0

☐

1

☐

2

☐

3

☐

2

Ownership is crystal clear across channel, marketing, sales, and ops.

0

☐

1

☐

2

☐

3

☐

3

Automation handles repetitive follow-ups while keeping clear owners accountable.

0

☐

1

☐

2

☐

3

☐

4

Your team can scale partner activity without increasing manual reminders.

0

☐

1

☐

2

☐

3

☐

SECTION SUBTOTAL

0 / 12

Reflection

What work would stop moving if one key team member stepped away?

OPERATING AREA 3

Revenue Handoff

Partner activity only pays off if the next team gets enough context to close the loop.

SCORE EACH STATEMENT 0-3

0 = Not in Place 1 = Manual Effort Needed 2 = Defined Process Exist 3 = Operational

1

Your program clearly defines which buying or partner signals actually warrant follow-up.

0
☐
1
☐
2
☐
3
☐
2

Named owners get assigned qualified signals with explicit instructions on what to do next.

0
☐
1
☐
2
☐
3
☐
3

Sales sees why the lead matters, what they engaged with, and where to take the conversation.

0
☐
1
☐
2
☐
3
☐
4

Marketing, channel, and sales work off a shared dashboard of priorities and follow-up status.

0
☐
1
☐
2
☐
3
☐
SECTION SUBTOTAL
0 / 12
Reflection

Where do hot opportunities lose momentum before reaching sales?

OPERATING AREA 4

Performance Evidence

You need concrete evidence connecting partner activity to pipeline, follow-up, and real revenue.

SCORE EACH STATEMENT 0-3

0 = Not in Place 1 = Manual Effort Needed 2 = Defined Process Exist 3 = Operational

1

You can easily tell the difference between passive logins and real execution.

0
1
2
3
☐
☐
☐
☐
2

Campaigns, MDF, enablement, and deal follow-ups are tracked in one place.

0
1
2
3
☐
☐
☐
☐
3

Executive reports highlight business outcomes and next steps, not just activity vanity metrics.

0
1
2
3
☐
☐
☐
☐
4

You can prove ROI using real data instead of educated guesses.

0
1
2
3
☐
☐
☐
☐
SECTION SUBTOTAL
0 / 12

Reflection

Which part of your ROI story is currently hardest to explain?

Final Results

See What Your Score Means

0–12

Program in Place, Operating Model Missing

You've got basic elements in place, but execution relies heavily on manual hustle. Grab your lowest-scoring area, map out the process, and fix the operational path before adding new tech or volume.

13–24

Dependent on Manual Coordination

You have repeatable routines, but people are still acting as bridges between disconnected systems. Pinpoint clear owners and automate one painful workflow.

25–36

Defined but Inconsistent

Your operating model is taking shape, but handoffs and tracking are hit-or-miss. Double down on the area where defined processes aren't driving consistent habits yet.

37–48

Built to Perform

Your program foundation is really solid. Keep leveraging your data to streamline the partner experience, speed up sales follow-through, and make your ROI case undeniable.

Where to Start



Partner Experience low? Map one core partner workflow end-to-end and remove every unnecessary step.



Team Workload low? Target the repetitive tasks currently held together by individual memory and manual nagging.



Revenue Handoff low? Define clear signals, owners, context, and immediate next steps for one primary campaign.



Proof of Performance low? Build a simple line of sight connecting partner sign-ups to sales actions and real revenue.