

Are You Prepared To Launch Your Portal?

We get it. Your team has worked hard during implementation and you are ready to launch your portal and introduce it to some of your partners. To ensure that not only you but also your partners have the best experience with your Allbound portal, we have created this Portal Readiness Checklist for you. **Please note, some capabilities/features are contingent on what you purchased.**

Are your partner/company accounts synced from your CRM into your Allbound portal? Do you see them appear on the Companies table in Allbound?

- Yes
- No

Have you customized the registration restricted message individuals encounter when they do not have a whitelisted email domain?

- Yes
- No

Has your team created any groups?

- Yes
- No

Has your organization customized your URL? (optional)

- Yes
- No

Has your organization customized the sender email address, no-reply@allbound.com? (optional)

- Yes
- No

Have you uploaded the following into your portal?

- Company logo
- Favicon
- Portal Login Background Image

PARTNER PORTAL READINESS CHECKLIST



- Default Asset Image
- Email Header Image
- 7-10 pieces of content
- Learning & Training content

Do you have the following set up for your dashboard?

- At least one featured image
- At least 2-3 dashboard buttons
- At least 2-3 Quick links
- Widgets enabled
 - Most Popular
 - The Newest Content
 - Most Recently Viewed
 - Channel Manager Visibility
 - Calendar Events

PARTNER PORTAL READINESS CHECKLIST



Are any of the following sections of your portal located in the left navigation panel empty? If yes and you are not planning to have them ready for the initial launch, please discuss with your Implementation Specialist to have them hidden.

- Training & Pre-Sales
- Content & Resources
- Playbooks
- Calendar
- Prospect Pages
- Pipeline

Are you taking a phased approach for your portal launch? Do any of the following need to be disabled/hidden until your team is ready?

- Training & Pre-Sales
- Gamification
- MDF
- Incentives *(if applicable)*

Have you tested your pipeline process?

- Yes
- No

Have you worked with your Implementation Specialist to get any test data removed?

- Yes
- No

Have you created any learning tracks for your partners?

- Yes
- No

Have you set up automated workflows via Partner Journey Automation? (if applicable)?

- Yes
- No

PARTNER PORTAL READINESS CHECKLIST



Has your team identified your rollout communication plan (*email, portal kick-off calls for your partners, etc*)?

- Yes
- No