Are You Prepared For Implementation?

To help your organization prepare for a successful implementation journey, we have created this checklist for your team. All of the below items are broken out by training sessions bucket. Feel free to come prepared prior to your session or you can tackle the list post the training session with your Implementation Specialist. Please note certain capabilities/features outlined in this document are contingent on what you have purchased through Allbound.

Portal Configuration & Customization

Getting Started

- [ ] Your company logo
- [ ] Your company favicon
- [ ] A graphic to be used as a default image for any content placed in the portal that may not have a designated featured image
- [ ] Image to use for your portal login screen
- [ ] Image to use on all of your portal system emails
- [ ] A custom URL your team owns to use for your portal *(optional)*
- [ ] Your company's primary Hex # & Google Font *(optional)* for your portal
- [ ] Email address & Sender name to use associated with your partner portal program *(optional)*

Partner Onboarding

Partner Registration & Management

Is your CRM ready for integration? Consider these to kick your integration into high gear.

- [ ] What partner information/fields currently exist in your CRM that you can leverage in Allbound? Here are a few of the most commonly used ones among our clients.
    - [ ] Type
    - [ ] Tier
    - [ ] Region
    - [ ] Country
    - [ ] Industry
    - [ ] Product
- [ ] Do you have to clean up your CRM?
    - [ ] Yes
    - [ ] No

- ☐ Will your team need to build new fields in your CRM?
  - ☐ Yes
  - ☐ No

- ☐ Has your team identified what groups need to be created for segmentation/visibility in Allbound?
  - ☐ Yes
  - ☐ No

- ☐ What type of partners do you have?
  - ☐ Reseller
  - ☐ Referral
  - ☐ Distributor
  - ☐ Technology
  - ☐ Agency/Consulting
  - ☐ MSP
  - ☐ Others____

Will you be using an external LMS within Allbound?

- ☐ Yes
- ☐ No

Will you be leveraging Allbound for learning tracks?

- ☐ Yes
- ☐ No

Are you planning to have quizzes as part of your learning tracks?

- ☐ Yes
- ☐ No

Will you be creating Certifications in Allbound?

- ☐ Yes
- ☐ No

Have you thought about what current materials you have available that can be used as training for your partners?

- ☐ Yes
- ☐ No

Content Management

- ☐ 2-3 pieces of content
- ☐ 1-2 pieces of training materials
- ☐ Have you thought about how your content will need to be filtered/tagged?
  - ☐ Yes
  - ☐ No

Revenue Management

Pipeline Management

Deal Registration is crucial to your Allbound portal. It provides full transparency when it comes to leads/opportunities and where your partner stands in the process. Your team should start to think about the following to ensure you are ready to talk dollars with your Integrations Specialist.

Does your team have a process in place currently for managing deals?

- ☐ Yes
- ☐ No

Do you want to allow partners to update the deal status?

- ☐ Yes
- ☐ No

What information will your partners need to provide when submitting deals?

Does your organization require Multi-Tier Distribution?

- ☐ Yes
- ☐ No

MDF Management

Does your team currently have MDF (Marketing Development Funds) in place?

- ☐ Yes
- ☐ No

If yes and you currently are handling it in Salesforce, will you want this integrated with the CRM?

- ☐ Yes
- ☐ No

If no, are you looking to start a basic setup for this MDF?

- ☐ Yes
- ☐ No

Does your team need the ability to assign MDF Funds and track payment in Allbound?

- ☐ Yes
- ☐ No

Incentives *(If applicable)*

What types of incentives does your organization support?

- ☐ Rebates
- ☐ Credits
- ☐ MDF
- ☐ Spiffs
- ☐ Incentives

How does your team currently handle commissions?

- ☐ Fixed amount
- ☐ % of the deal

Would you like your incentives integrated with your CRM?

- ☐ Yes
- ☐ No

Are you looking to be able to pay incentives via Allbound?

- ☐ Yes
- ☐ No

Partner Engagement & Retention

- ☐ What are 2-3 things you want your partners to do/see immediately once they have logged into the portal (for example, Welcome video, Register A Deal, View a case study)

- ☐ What automated workflows/emails are you looking to set up? (example welcome email, no login, etc)

- ☐ Is your Contact Us Form enabled with an email associated with it?
    - ☐ Yes
    - ☐ No

- ☐ Have you thought about following goals/strategy for your Partner Plans? *(if applicable)*
    - ☐ Details
    - ☐ Strategy
    - ☐ Objectives
    - ☐ Onboarding
    - ☐ Training
    - ☐ Sales