

Channel Partner Profile (copy, edit, send — plain text)

Partner name

[Company, website, HQ city/country]

Profile owner & date

[Your name, role] — [YYYY-MM-DD] — Next review: [YYYY-MM-DD]

Fit snapshot (one paragraph)

[Who they serve, how they sell, what they deliver, and why this partnership wins.]

Why this partner (3 bullets)

- [Overlap in ICP / geography / tech stack]
- [Complementary services or integration]
- [Evidence: logos, reviews, or certified individuals]

Company basics

Legal entity: [LLC/GmbH/etc.] — Founded: [year] — Employees: [#] — Regions served: [countries/states]

Go-to-market footprint

- Motion: [Referral / Resale / Co-sell] — Direct sales: [Yes/No] — Average sales cycle: [X weeks]
- Primary channels: [Field sales / Digital / Marketplace] — Rep count: [#] — Partner program contact: [name, email]

Customer base & segments

- Industries: [list] — Company size focus: [e.g., 200–2,000 employees]
- Buyer roles: [e.g., CRO, VP RevOps, Head of Partnerships] — Top 5 reference customers: [names, links]

Offerings & services

- Packaged services: [names, durations, fees] — Support model: [hours, SLAs]
- Implementation roles: [architect, consultant, CSM] — Utilization target: [range]

Technical capabilities

- Platforms: [Salesforce / HubSpot / etc.] — Certified individuals: [# + names/IDs]
- Integrations delivered: [list] — Compliance: [ISO/SOC2/other] — Languages: [list]

Commercial model

- Referral: [commission % and term] — Resale margin target: [%] — Discount asks: [% or “none”]
- Renewals: [who leads] — Billing model: [fixed-fee / T&M] — Typical project size: [\$]

Geography & coverage

- Primary delivery locations: [cities/countries] — Travel stance: [on-site/remote/hybrid]
- Time zones covered: [list]

Partnership thesis (2–3 sentences)

[Why both sides win, with the customer outcome stated plainly.]

Joint value proposition (customer-facing)

[One sentence that combines their strength with your product to solve a named problem.]

Repeatable plays (2–3)

- Play 1 — ICP: [segment]; Problem: [one line]; Solution: [how we combine]; Outcome: [metric + time frame]; Evidence: [case/link]
- Play 2 — ICP: [segment]; Problem: [one line]; Solution: [how we combine]; Outcome: [metric + time frame]; Evidence: [case/link]
- Play 3 — [optional]

Co-selling motion

- Sourcing: [who identifies]; Registration: [where/how]; Qualification: [criteria];
- Handoff: [owner by stage]; Security/legal: [steps]; Close: [who signs]; Post-sale: [success owner]

Co-marketing assets

- Available: [case studies, one-pagers, webinars]; Needed: [gap list];
- MDF eligibility: [yes/no]; Launch plan (30 days): [two activities with dates]

Systems & data

- CRM: [Salesforce/HubSpot]; PRM/workspace: [tool/link]; Reporting cadence: [weekly/monthly/QBR];
- Shared channel: [Slack/Teams/email]; File repository: [link]

Contacts & roles

- Executive sponsor: [name, title, email]
- Partner manager: [name, title, email]
- Sales lead: [name, title, email]
- Delivery lead: [name, title, email]
- Marketing lead: [name, title, email]
- Finance/Legal: [names, emails]
- KPIs & targets (first 90 days)

Pipeline: [#, \$] — First meetings booked: [#] — Opportunities to proposal: [# or %]

Closed-won: [# or \$] — CSAT on first project: [score] — Training completions: [#]

Risks & assumptions

[Known risks with owners and mitigation; assumptions that could impact delivery or sales.]

Enablement plan (30/60/90)

- 30 days: [trainings, first campaign, first registered opp]
- 60 days: [case study in progress, two active opportunities]
- 90 days: [first go-live, QBR booked, tier review]

Next steps

[Three actions, each with one owner and one date]

Change log

[YYYY-MM-DD] — [Update] — [Owner]