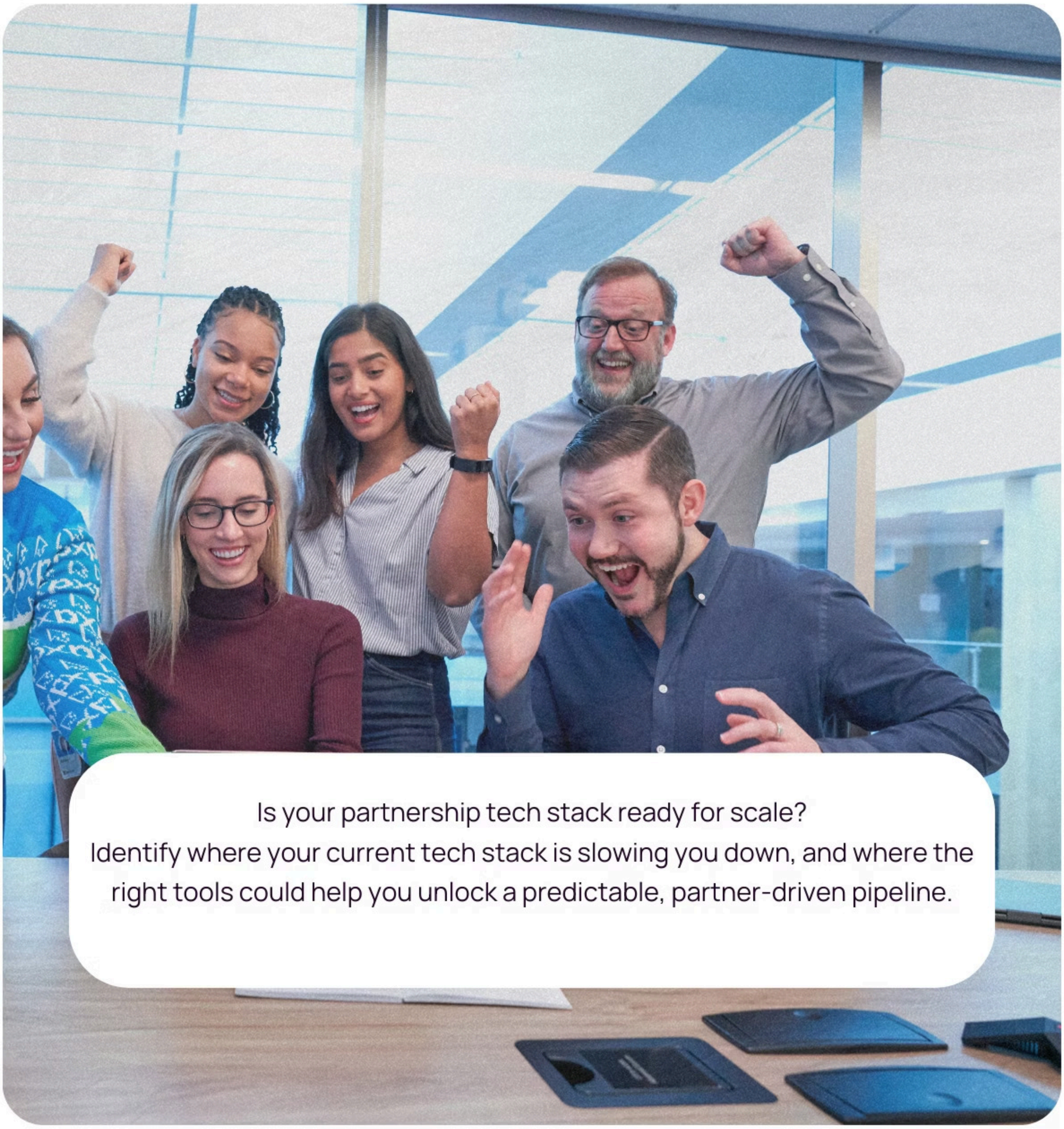
5-Step Partnership Tech Stack Audit Checklist



Is your partnership tech stack ready for scale?
Identify where your current tech stack is slowing you down, and where the right tools could help you unlock a predictable, partner-driven pipeline.

What's Inside This Resource

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What You Will Discover

- Why spreadsheets and CRM workarounds break down as partner programs grow — and what scalable infrastructure looks like instead
- How a dedicated partner platform creates a single source of truth for deals, revenue attribution, and partner communication
- The core building blocks of a modern partnerships tech stack — from PRM to CRM integration and partner enablement
- Practical ways to automate onboarding, deal registration, and reporting so your team can focus on building stronger partner relationships
- A simple framework to assess whether your current setup supports predictable, partner-driven pipeline — or is holding your program back

Meet Your Expert Guide

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Michelle Teo is a Partner Marketing Specialist and Founder/Growth Advisor at Demand Conversion. She helps B2B SaaS companies turn partnerships into a measurable, repeatable revenue engine.

Over the past decade, Michelle has worked with 30+ companies in the $5M–$100M range across SaaS, fintech, and enterprise ecosystems.

She focuses on building structured partner programs and scalable co-marketing and co-selling initiatives that generate pipeline and improve conversion.

Michelle is also a founding member of Partnerships in Play, a collective of partnership and growth experts helping SaaS and enterprise companies scale through partner-led GTM.

Ecosystem & Channel Growth

Identifying and activating the best-fit partners to open new markets and accelerate growth.

Partner Marketing Execution

Building and running scalable partner marketing programs that generate pipeline and revenue.

Revenue Reporting & ROI

Connecting partner activity to revenue outcomes with clear, defensible metrics that earn internal buy-in.

The Problem: Why Spreadsheets Don't Scale

If you're still managing your partner program out of spreadsheets, you're not alone.

Most partnership teams at growth-stage SaaS companies spend hours every week:

- Manually tagging partner opportunities
- Chasing sales for updates on partner deals
- Emailing partners content they can't easily find
- Manually calculating commissions and updating sheets
- Pulling reports that should take minutes, but take half a day
- Explaining to leadership why partner ROI is "hard to measure"

At early stages, this might feel manageable.

But as your program grows, the cracks widen.

Partnership teams spend hours and hours manually responding to partner emails every day. Attribution gets disputed, creating friction between partnerships and sales. And ultimately, your team spends more and more time doing manual administrative work than acquiring and building partnerships.

> Before you can scale partnerships, you need to **fix those cracks.**

This 5-Step Tech Stack Audit Checklist is designed to help you pinpoint gaps in your current processes and next steps to build a scalable partnerships channel.

How to Use This Checklist

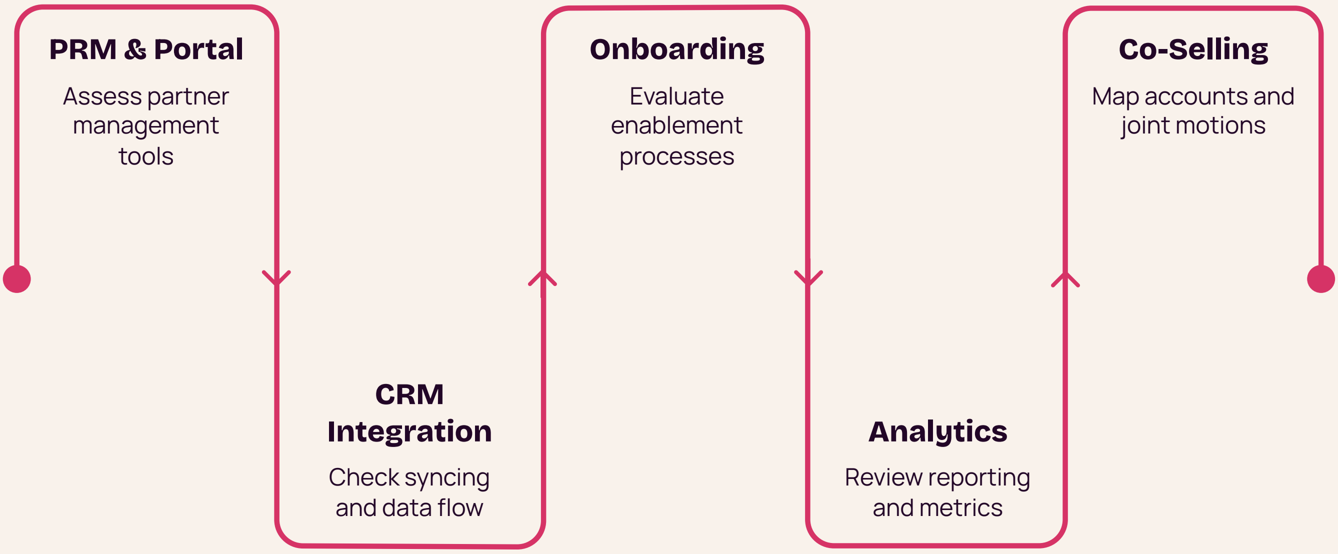
Work through each section of the audit with your partnerships team.

For every question, tick the box if you have this capability in place today (NOT in progress or planned, although you can make a note of this in the Gap/Notes column).

You can also use the Gap/Notes column to record what's currently missing, broken, or what tools you're currently using.

Count your total ticks at the end to see your score.

The 5-Step Partnerships Tech Stack Audit Checklist



Work through each of the five sections below to assess your current partnerships infrastructure.

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1. PRM & Partner Portal

☑️	Audit Question	Gaps/Notes
☑️	Do you use a dedicated PRM?	
☑️	Are partner applications reviewed and approved automatically?	
☑️	Do partners have a self-serve portal to access content, submit leads, track deals, and view their earnings without emailing you?	
☑️	Does your PRM support tiered partner management? (e.g. high touch vs low touch, managed vs. unmanaged, multiple commission structures)	
☑️	Do you use one platform to run different partner types (referral, reseller, affiliate)?	

2. CRM Integration

☑️	Audit Question	Gaps/Notes
☑️	Is your PRM integrated with your CRM via a native two-way sync?	
☑️	Are partner-sourced and partner-influenced deals clearly distinguished in your CRM automatically?	
☑️	Does your system flag conflicts when a partner submits a lead that Sales is already working on?	
☑️	Are commissions calculated and tracked automatically when deals close or renew in your CRM?	
☑️	Can you easily share leads with partners from your CRM and track their status?	

3. Onboarding & Enablement

☑️	Audit Question	Gaps/Notes
☑️	Do you have an automated onboarding pipeline with defined steps and progress tracking?	
☑️	Are onboarding emails triggered automatically as partners complete milestones?	
☑️	Do partners have a central content hub for training materials, product docs, and co-brandable sales assets?	

4. Analytics & Reporting

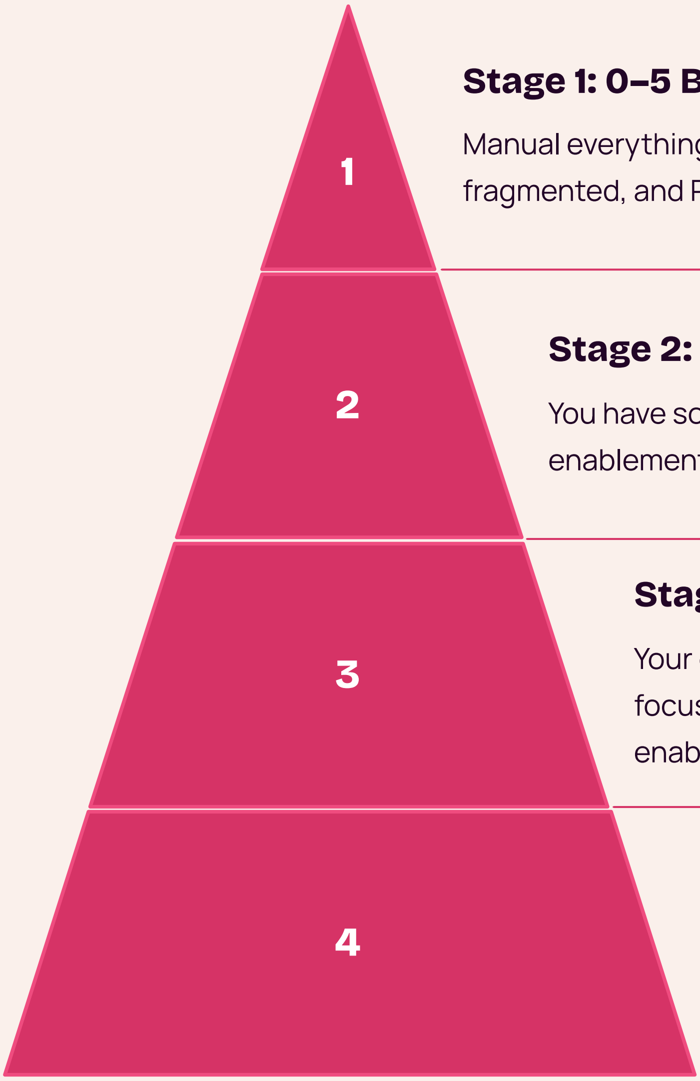
☑️	Audit Question	Gaps/Notes
☑️	Do you have a live dashboard tracking key metrics? (e.g., partner pipeline contribution)	
☑️	Is partner-sourced and partner-influenced revenue broken out separately in your reporting?	
☑️	Can you identify which partners are active vs. inactive without manually cross-referencing data?	
☑️	Can you segment performance by partner type, tier, or region?	
☑️	Can you easily track MDF spend against pipeline and revenue outcomes?	

5. Co-Selling & Account Mapping

☑️	Audit Question	Gaps/Notes
☑️	Are target accounts automatically mapped against your partners' customer base?	
☑️	Can partners see the status of deals they've referred at every stage of your pipeline without emailing you for updates?	
☑️	Can Sales coordinate with partners directly on co-selling opportunities?	
☑️	Are SPIFFs or co-sell incentives tracked and paid out automatically?	

Results: Find Your Stage

Count the total number of boxes checked across all sections to find your stage.



Stage 1: 0–5 Boxes Checked

Manual everything. Spreadsheets and email are your PRM. Data is fragmented, and ROI is invisible.

Stage 2: 6–11 Boxes Checked

You have some tools in place, but attribution is partial, enablement is generic, and co-selling is inconsistent.

Stage 3: 12–17 Boxes Checked

Your core infrastructure is solid. Now is the time to focus on further automation, deeper analytics, and enabling co-selling at scale.

Stage 4: 18–22 Boxes Checked

Partners can self-serve, data is clean, and co-selling is repeatable.

Recommended Next Steps with Kiflo

Based on your stage, here's where to focus next:

1

Stage 1

Start with Kiflo's PRM to centralise deal registration, partner onboarding, and communication.

2

Stage 2

Connect Kiflo to your CRM (e.g., HubSpot, Salesforce) to close the attribution gap. Set up automated onboarding sequences and structured deal-reg flows.

3

Stage 3

Use Kiflo's analytics to build a live pipeline dashboard. Stand up co-marketing asset libraries and segment partners into managed vs. unmanaged tiers.

4

Stage 4

Activate Kiflo's advanced reporting to track LTV/CAC by partner type. Use partner health scoring to prune low performers and double down on top tiers.

> **Before you can scale partnerships, you need to fix the cracks.** This checklist is your starting point — use it to build a tech stack that turns partnerships into a measurable, repeatable revenue engine.

Ready to See Kiflo in Action?

Discover how Kiflo helps partner teams **measure, scale, and optimize** that impact across every motion: from onboarding to revenue.

What You'll See in our Demo

Track and Measure Revenue

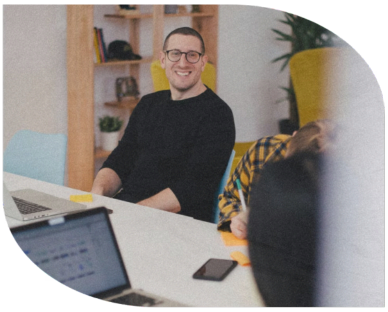
Gain full visibility into partner-sourced and influenced deals to understand your ecosystem's true impact.

Empower and Engage Partners

Collaborate seamlessly through partner portals, deal registration, and real-time performance dashboards.

Automate and Integrate Everything

Sync partner data with your CRM and streamline enablement, payouts, and reporting, all from one platform.



Ready to build stronger partnerships?

Experience how Kiflo can scale your partner program.

Book Your Demo →

kiflo