SaaS Partner Program Launch Checklist

This checklist provides the specific operational steps you need to take before signing your first partner. It focuses on removing the friction that usually stops external collaborators from sending you high-quality leads.

Phase 1: Financial and Legal Foundation

- [ ] Determine your commission structure by deciding between a flat one-time fee or a recurring percentage of the subscription.
- [ ] Establish the payout window to clarify if partners get paid immediately or after a 30-day "refund protection" period.
- [ ] Draft a simple Lead Registration Policy that explains how you handle "who saw the lead first" disputes.
- [ ] Set a minimum payout threshold to avoid the administrative burden of processing very small commission amounts.
- [ ] Define the partnership duration within your agreement so both parties know if the commission lasts for one year or the lifetime of the customer.

Phase 2: Technical Setup and Tracking

- [ ] Select a tracking method such as unique URL parameters, dedicated promo codes, or a full Partner Relationship Management (PRM) platform.
- [ ] Configure your attribution logic to decide if the "first click" or the "last click" gets the credit for the sale.
- [ ] Create a partner "Sandbox" or demo account so your collaborators can show off the software without using live customer data.
- [ ] Automate the onboarding flow so that a new partner receives their login and tracking links the moment they are approved.

- [ ] Test the tracking link end-to-end by making a dummy purchase to ensure the commission is correctly recorded in your system.

Phase 3: Partner Enablement Assets

- [ ] Write a 1-page "Cheat Sheet" that lists the top three problems your software solves and your current pricing.
- [ ] Build an Ideal Customer Profile (ICP) guide that explicitly lists the industries and job titles the partner should target.
- [ ] Provide a "Negative ICP" list to tell partners which types of customers are a bad fit and will likely result in a rejection.
- [ ] Create three email outreach templates that partners can copy and paste to send to their existing client lists.
- [ ] Upload a folder of brand assets including your high-resolution logo, product screenshots, and approved social media images.

Phase 4: Recruitment and Launch

- [ ] Identify your top 20 power users who already have a high Net Promoter Score or frequent engagement with your support team.
- [ ] Send a "Beta" invitation email to these users offering them early access to the partner program in exchange for feedback.
- [ ] Set up a 15-minute intro call for new partners to walk them through the dashboard and answer technical questions.
- [ ] Create a "Partner News" email segment to send monthly updates about new product features or success stories.
- [ ] Schedule a 90-day review to look at your data and see which partners are active and which ones need more help.