PARTNER PROGRAM GUIDE

Can buyers see why they need both partners?

Work through fit, responsibility, cost and ongoing support with your partner team. Includes a fictional example and a fill-in brief.

Begin with the question behind the partnership.

The worked example in this guide is fictional. It is not a client result or a market benchmark.

Your firms may have a strong relationship, a joint campaign fund and a list of target accounts. The buyer still needs to understand why working with both of you would help.

Write the customer problem before the partner message. Then ask whether each firm's role is clear enough for a buyer to question it.

A worked example

A software provider and a services firm want to discuss a new data platform with enterprise buyers. Their first draft lists the platform's features, the services firm's certifications and the strength of the partnership.

The buyer already runs several systems. Their questions are more practical:

- Will this fit what we have?

- Who is responsible for the parts between systems?

- What costs sit outside the software license?

- Who will still be involved after deployment?

The partner team changes its brief. It will explain one specific customer situation, the conditions where the approach fits and the work each firm owns. It will also name what the customer needs to provide.

That brief can guide an article, a working discussion or a sales conversation. The format comes after the answers.

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Make the joint offer clear.

1. Show when the approach fits.

The software provider can explain its product's capabilities and limits. The services firm can explain the work needed to fit it into the customer's environment. Both should be able to discuss conditions where the proposed approach needs more review.

In the example, the team does not assume every buyer needs to replace a platform. It asks which part of the current setup causes the problem and whether that part can be improved without a wider change.

Write: This approach fits when ____. We need further review when ____. The buyer should also consider ____.

Do not claim neutrality just because the language sounds balanced. Show the options considered and the reasons for the recommendation. Commercial relationships should be described accurately.

2. Make responsibility visible.

Two logos can make accountability harder to see. A buyer should know who leads the first conversation, who scopes the work and who owns an issue during delivery.

In the example, the partner teams create a responsibility table with five rows: product fit, integration work, data preparation, delivery issue and ongoing support. Each row has a lead, a supporting team and a way to raise a problem.

Do not fill the table with commitments the teams have not accepted. An open responsibility is a question to resolve before it becomes a buyer promise.

Write: The customer should contact ____ about ____. That person can bring in ____. If the issue remains open, ____ owns the next decision.

3. Explain the cost boundaries.

The buyer may need to combine licenses, implementation, data work, support and internal time to judge the proposal. A single headline price can hide those differences.

The partner marketing team should not invent the commercial answer. It should ask the people who own pricing and delivery to state what is included, what varies and what is still unknown.

In the example, the joint material shows cost categories and the factors that change them. Any estimate remains tied to a defined scope and owner.

Write: The proposal includes ____. It does not yet price ____. The estimate depends on ____. The commercial owner is ____.

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Plan the follow-through.

4. Show what happens after the first project.

An ongoing-value statement means little if nobody owns the follow-up. Explain who will review adoption, unresolved issues and any further work with the customer.

In the example, the firms agree who leads the client review and what each team brings. They separate committed support from any optional new project. The customer can see the next review without being asked to accept an open-ended program.

Write: After the initial work, ____ owns ____. The next review covers ____. Any further work needs ____.

Choose proof that answers the concern.

A client name alone does not show whether the joint approach will fit this buyer. Choose an example that explains the situation, each firm's work and the result that can be supported.

If the example only proves that a program ran, say that. If a client reported a result, record who reported it, when and how it was defined. Obtain permission before using a name, logo, quote or confidential detail.

Use an illustrative sample when the aim is to explain how something works. Label it clearly and keep it separate from client proof.

Choose the first activity.

Use an article when the team needs to explain a view. Use a guide when buyers need help comparing choices. Use a discussion when the teams need to learn from different experiences. Use a demand program when the audience, message and follow-up rules are ready.

Write the job of the activity in one sentence: This should help the buyer ____.

If the answer is only "know about the partnership," return to the customer problem.

Review it with both teams.

Give each partner time to challenge the draft. Look for answers that sound clear but depend on an unmade decision. Resolve those before the content or invitation goes out.

Use the example in this guide, then answer for your own partnership. Write only commitments both teams have accepted. Mark unresolved items "To confirm" and name who will resolve them. Keep confidential client details out of this copy.

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Your joint program brief

Using the worksheet

Save a copy before typing, or print it and write by hand. Fill in what you know; write "To confirm" for an open decision. Save and reopen your copy to check that entries remain. If your preview does not accept typing, open the saved file in a PDF app that supports forms. Each box is for short notes; use a separate page for a longer answer. Nothing is sent automatically.

What is the customer's situation, and what must they decide?

Describe the problem before the joint offer. For example: a customer needs to connect existing systems and decide which work to do first.

Up to 300 characters

Who is the work for?

Name the relevant responsibilities, company context and accounts or account types. Avoid "all enterprises" unless the work truly supports that breadth.

Up to 300 characters

What does Partner A contribute, and where does its responsibility stop?

Name the product, expertise or work it provides. Include a material limit, such as what its standard product does not cover.

Up to 300 characters

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Responsibilities and fit

What does Partner B contribute, and where does its responsibility stop?

Explain the distinct role. For example, the services team may own integration work while the product team owns product defects.

Up to 300 characters

What does the customer need to provide or own?

List necessary people, decisions, data preparation or access. Do not treat these as agreed until the customer confirms them.

Up to 300 characters

When does this approach fit, and what else should be considered?

State the conditions that make the joint approach suitable, where more review is needed and any relevant alternative.

Up to 300 characters

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Costs, ownership and evidence

Which costs are included, variable or still unknown?

Consider licenses, implementation, data work, support and the customer's time. Name who can confirm the estimate; do not invent a price.

Up to 300 characters

Who owns each stage and resolves a problem?

Cover the initial discussion, scope, delivery and support. Identify a lead and an escalation route rather than writing "both partners" for every stage.

Up to 300 characters

What evidence can the partners share?

Choose a relevant example and state what it actually supports. Record the permission status before using a name, logo, quote or confidential detail.

Up to 300 characters

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First activity and review

What should the first activity help the buyer do?

Choose an article, guide, discussion or demand activity because of the buyer's task. For example, a guide may help compare implementation responsibilities.

Up to 300 characters

Who handles replies and coordinates with existing account owners?

Name the person or role and the handoff process. Check existing relationships before either partner starts a separate approach.

Up to 300 characters

What will make the teams continue, change or stop?

Agree what evidence the review will consider, who makes the decision and when. Keep optional next work separate from existing commitments.

Up to 300 characters