PARTNER MARKETING TOOLKIT

How to Stop Bribing Partners & Start Building With Them

GOLF IS NOT A FUNNEL STAGE

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The Tools You Didn't Know You Needed

(Until Your Last QBR Made You Cry)

Look, you didn't sign up to be the Partner Marketing Fairy—flitting from MDF request to spreadsheet fire, handing out gift cards and praying something turns into pipeline. You want structure. You want clarity. You want your partners to actually do the stuff you planned together.

Good news: This toolkit is your lifeline.

These aren't "best practices" wrapped in corporate beige. These are no-fluff, call-it-like-it-is tools for partner marketers who are done with guessing games, ghosted leads and "strategies" that only exist in PowerPoint.

Each one is designed to inject structure, spark accountability and squash the excuses that clog your funnel like last week's junk leads.

What's Inside:

You've got goals. We've got tools.
Here's what you're about to unleash:

TOOL 1
Partner Marketing Self-Assessment
A 10-question quiz that will expose the truth about whether you're running a revenue engine—or an expensive group chat.

TOOL 2
Shared Lead Generation Framework
Who does what, when and with which tools because "I thought you had it" is not a follow-up strategy.

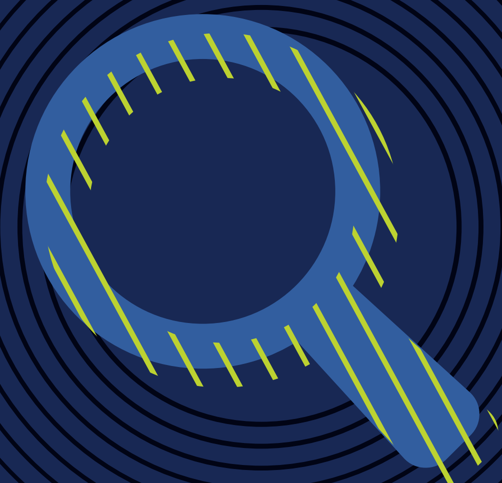
TOOL 3
Campaign Planning Worksheet
Turn MDF chaos into co-funded, co-executed greatness because "just trust us" isn't a campaign plan.

TOOL 4
Partner Accountability Toolkit
Scorecards, QBR prompts and co-sell checklists because what gets measured gets done—and what doesn't gets awkward at QBRs.

TOOL

1

Partner Marketing Assessment



Is Your Partner Program a Dumpster Fire Wrapped in a Deck?
Take this 10-question quiz to figure out if you're running a high-impact partner machine—or just lighting MDF on fire and calling it strategy. Be honest. We already know.

USE WHEN	You need an honest reckoning (or a fun icebreaker that hits a little too hard).
WHY IT MATTERS	Awareness is the first step in recovery.

Score Yourself

45–50 POINTS
Pipeline Royalty
You're running a tight ship. Leads get followed up, MDF delivers ROI and your partners actually perform. Send this quiz to someone who needs it.

30–44 POINTS
Slightly Unhinged But Recoverable
You've got some structure—but you're tolerating nonsense. Fix the gaps before the next QBR becomes a funeral.

15–29 POINTS
MDF Dumpster Fire
You're busy doing things that look like partner marketing. But let's be honest—your results aren't matching the budget.

<15 POINTS
The Loyalty Casino
You're not running a program. You're running a swag-based fantasy league. Burn it down and start fresh.

How to Score

A = 5 pts B = 3 pts C = 1 pts

1 When your partners ask for MDF, they usually…
- **A.** Show up with a campaign plan, budget and KPIs.
- **B.** Mention "golf" and "awareness" in the same sentence.
- **C.** DM us a spreadsheet from 2021 and ask for $10K.

2 How do you track partner-sourced pipeline?
- **A.** With dashboards, scorecards and CRM hygiene we're proud of.
- **B.** We rely on "verbal updates." And vibes.
- **C.** If they say they generated it, we just believe them.

3 Your lead handoff process looks like…
- **A.** SLA-driven, clearly defined and tracked.
- **B.** A shared inbox and crossed fingers.
- **C.** When is the partner bringing us leads?

4 When a partner ghosts a lead…
- **A.** We reassign, document it and take action.
- **B.** We send a "just checking in" every 10 days until we die.
- **C.** Aren't they supposed to give us leads?

5 Your enablement strategy is…
- **A.** Tiered, customized and actually useful.
- **B.** A single email with a pitch deck and a prayer.
- **C.** Wait, we were supposed to enable them?

6 Your incentive strategy is…
- **A.** Tied to results, not participation trophies.
- **B.** Everyone gets a SPIFF! (As long as it's tagged correctly in the CRM.)
- **C.** If they show up to a webinar, we give them a gift card.

7 How do you tier or evaluate partners?
- **A.** Based on contribution: pipeline, engagement and win rate.
- **B.** Based on how often they email us.
- **C.** Our tiers are mostly decorative.

8 Co-marketing means…
- **A.** Joint messaging, shared KPIs and results we track.
- **B.** A last-minute webinar with 12 RSVPs.
- **C.** We let them put their logo on outdated white papers ... if they know how to do that.

9 Co-selling at your company is…
- **A.** A documented process with ownership and workflows.
- **B.** We'll join if our AE is available.
- **C.** A bunch of people on Zoom, talking about their lunch plans.

10 QBRs are used to…
- **A.** Review data, adjust strategies and plan forward.
- **B.** Catch up and swap buzzwords.
- **C.** Review the deck with the wrong numbers while everyone says, "That doesn't seem right."

Add Your Points

Q 1		Q 2		Q #3		Q4		Q 5		Q 6		Q 7		Q 8		Q 9		Q 10		TOTAL
	+		+		+		+		+		+		+		+		+		=	

TOOL

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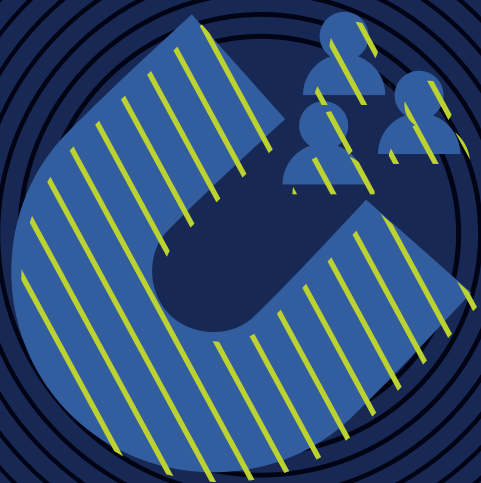

Shared Lead-Generation Framework

Clarify who owns what (and when) across your lead funnel, so you never have to hear “I thought you were following up” again. This tool maps roles, timelines and tools so your handoffs don’t turn into drop-offs.

USE WHEN	Everyone’s pointing fingers and no one’s following up.
WHY IT MATTERS	Because “alignment” should be more than a vibe.

How to Use It:

1. Get in a room (or Zoom) with your partner.
2. Walk through each funnel stage.
3. Assign roles, responsibilities and tools.
4. Agree on deadlines like grown-ups.
5. Sign it. Frame it. Stick it to your monitor.

Use this Framework to Make the Pipeline Dream Work

	Vendor Responsibilities	Partner Responsibilities	Tools/Support Used
TOFU Awareness	Digital ads, PR, syndicated content	Social sharing, blog amplification	Content library, email templates
MOFU Interest/Nurture	Host webinars, run retargeting, nurture tracks	Promote, drive attendance, initial outreach	Joint event calendar, nurture automation
BOFU Evaluation	Provide sales engineers, trials, proposals	Handle deal discovery and qualification	Demo scheduler, proposal builder
Close & Post-Sale	Contracts, billing, provisioning	Onboarding, QBR prep, renewals	Account plans, onboarding playbook

SLA Cheat Sheet

MQL	First Touchpoint	Qualification Update	Pipeline Status
PARTNER IN <24 HOURS	<2 DAYS	1 Within WEEK	Weekly UPDATES

TOOL

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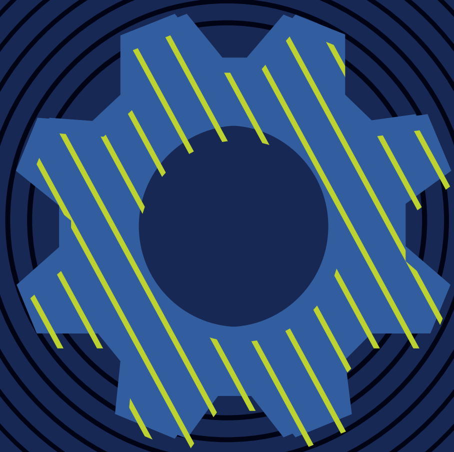

Campaign Planning Worksheet

Turn chaotic MDF asks into structured, ROI-driven campaigns with a clear target, shared roles and actual performance metrics. It's a campaign plan disguised as a sanity-saver.

USE WHEN	You get an MDF request that reads like a ransom note.
WHY IT MATTERS	Because funding chaos is not a strategy.

How to Use It:

1. Use this at the start of every campaign discussion.
2. Fill it out *together*—partners don't get to submit half-baked napkin notes.
3. Align on roles, dollars, timing and results.

Campaign Planning Worksheet

Campaign Name	
Target Segment / ICP	
Partner Role	
Vendor Role	
Budget	
Resources	
Launch Timeline	
Primary CTA or Offer	

Campaign Tactics (check all that apply):

TACTICS	DEPLOYMENT DATES
Webinars	
Paid Media	
Content Syndication	
ABM	
Email Sponsorship	
Other	

Performance Goals

METRIC	TARGET	ACTUAL	NOTES
MQL Volume			
MQL-to-SQL Conversion			
Pipeline Contribution			
Cost Per Lead			
Launch Timeline			
Primary CTA or Offer			

Post-Campaign To-Do List

- ○ Debrief campaign performance
- ○ Share lessons learned
- ○ Create a success story
- ○ Update playbooks

TOOL

4

Partner Accountability Scorecard

Give your program a scoreboard, a coaching guide and a reality check all in one. This tool helps you track what's working, call out what's not and have better QBRs (without the spin).

USE WHEN	You need to know who's slacking—and fix it.
WHY IT MATTERS	You can't track what you don't measure—or coach who you don't confront.

How to Use It:

1. Fill out the monthly scorecard.
2. Bring the QBR prompts to every meeting.
3. Use the co-sell checklist before any joint selling motion.
4. Rinse, repeat, get results.

Monthly Scorecard

METRIC	GOAL	ACTUAL	TREND VS. LAST MONTH	NOTES
Leads Assigned				
SLA-Compliant Follow-Up				
MQL-to-SQL Conversion				
Pipeline Influenced				
Closed-Won Revenue				
Campaign Engagement				

QBR Prompts Alignment. Clarity. Tracking. Sustainability. (A.C.T.S.)

- ○ Which campaigns actually worked—and why?
- ○ Where are deals stalling?
- ○ What verticals are gaining traction?
- ○ What resources are we not using (but should be)?
- ○ What's our realistic forecast for next quarter?

Co-Sell Readiness Checklist

- ○ Joint value prop agreed
- ○ Opportunity registration working
- ○ AEs and SEs introduced
- ○ Shared sales calendar created
- ○ Lead routing mapped
- ○ Escalation plan documented
- ○ Metrics for success aligned

Parting Shots

Use the tools.

Customize them.

Print them out. Tattoo them on your CRM dashboard.

Share them at your next QBR like the thought leader you are.

Just don't let them die in your downloads folder next to that "Final_Final_ReallyFinal_v7" deck from 2021.

- Let's stop checking boxes and start moving needles.
- Let's stop rewarding attendance and start expecting performance.
- Let's stop bribing partners and start building *with* them.

You've got this!
And if you don't? Call us.

Seriously.

With love,

Rachel + Khali

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P.S. If you're stuck in the partner marketing twilight zone—or just need help getting these tools adopted without causing a mutiny—slide into our inboxes. We've seen it all, fixed most of it and we've got memes for days.

BuzzTheory

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She Is A Bit Much

Founded and co-hosted by Rachel Turkus, "She Is A Bit Much" is a Dear Abby-style podcast for every woman who's been told she's too ambitious, too emotional, too direct, too much—and kept going anyway. We talk about surviving workplace chaos, rewriting outdated norms, and building a career and life on your own terms. Have a story to share or a question to ask? Reach out. Around here, being "a bit much" is exactly right.

www.sheisabitmuch.com