

Ecosystem Tracking Audit Checklist

Run this quarterly, or anytime someone says "Wait... who referred that deal?" We have a [Tracking Audit Agent](#) to help if you want some analysis and recommendations.

Intake & Submission

Do you have standardized intake mechanisms for each ecosystem motion?

- Referral partner form or link
- Customer referral capture (e.g., widget, portal, form)
- Partner-submitted opportunities or lead registration
- Affiliate/influencer links with tracking parameters

Is intake data automatically connected to your CRM or deal flow?

- New leads or deals are auto-tagged by source/motion
- Referral/partner is recorded as a contact or source field
- No manual entry required (or minimal and monitored)

Attribution & Reporting

Can you track conversion from partner submission to pipeline to revenue?

- You can see how many leads each partner/motion sourced
- You can view opp status, conversion, and time-to-close
- You can tie closed/won deals to original source/motion

Is there a consistent tagging or source-of-truth field?

- You have defined and documented source rules
- Your sales/ops teams actually follow them
- You regularly QA data hygiene (spot checks, automation audits)

Can you report by ecosystem motion (reseller, affiliate, referral, etc.)?

- Your CRM or BI tool lets you slice by motion
- You track revenue per partner or channel
- You can compare ecosystem performance to other GTM channels

Compensation & Recognition

Do you have a clear, automated trigger for partner compensation?

- Payment or recognition is based on CRM data, not vibes
- Trigger = "Qualified" stage, Closed/Won, or invoice paid
- Someone is accountable for reviewing and approving regularly

Can you tie payments or rewards back to a specific submission?

- There's a record of who referred what
- You don't get into debates about split credit
- You're not manually pulling reports from three systems

Test It Right Now

Here's the fire drill:

1. Go into your CRM.
2. Pick 3 deals you know came from partners.
3. For each deal, can you answer:
 - Who referred it?
 - When?
 - How did it enter the system?
 - What's its current status?
 - Has the partner been paid or credited?

If you can't answer at least 4 out of 5 for each one, your tracking system needs love.

Emergency Restart Checklist

For when things stall, partners ghost, and your dashboard is flatter than a stale IPA. You can also run our [Emergency Restart Agent](#) and get concrete recommendations based on your answers.

Diagnose the Stall

Stage	Check	Status
Partner signups	Any new partner interest in the last 30 days?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Activation	Are partners submitting anything or engaging at all?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Lead flow	Are leads actually getting submitted?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Pipeline conversion	Are leads moving to opps?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Closed/Won	Are referred opps closing?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Communication	Have partners heard from you in the last 30 days?	<input type="checkbox"/> Yes <input type="checkbox"/> No

Secret Shop the Flow

Test	Result
Can a new partner understand what to do immediately?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are forms, links, and email flows working?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Is there a clear call to action on how they get paid?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Is the onboarding content tailored to partners (not internal sales)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are next steps obvious and accessible post-signup?	<input type="checkbox"/> Yes <input type="checkbox"/> No

Reactivation Moves

Action	Complete?
Send a "one thing this week" ask to all partners	<input type="checkbox"/>
Launch a limited-time bonus or incentive	<input type="checkbox"/>
Share a new case study, resource, or script	<input type="checkbox"/>
Reach out personally to top 3 partners	<input type="checkbox"/>
Send an update showing lead status and earnings	<input type="checkbox"/>
Post a short-term team/partner goal publicly	<input type="checkbox"/>

Declutter the Program

Review	Done?
Archive inactive partners (>90 days no activity)	<input type="checkbox"/>
Clean up tracking flows (CRM, referral links, etc.)	<input type="checkbox"/>
Remove or consolidate unused partner assets	<input type="checkbox"/>
Kill non-performing motions or offers	<input type="checkbox"/>
Update onboarding materials to reflect current strategy	<input type="checkbox"/>

Next Checkpoint

Schedule	Date
Next ecosystem review scheduled?	<input type="checkbox"/> Yes → (date scheduled)
Owner/accountable person assigned?	<input type="checkbox"/> Yes → _____
Metrics defined for next review? (e.g., 5 referrals, 3 opps)	<input type="checkbox"/> Yes → _____

Enablement Snapshot Templates

How to Use These Snapshots

- Pick your partner type below.
- Copy the checklist to your onboarding flow, resource hub, or partner portal.
- Update regularly-enablement is a living thing, not a one-and-done PDF.
- Check out our [Enablement Checklist Agent](#) for custom recommendations

Jump to:



[Reseller/Channel Partner Enablement Snapshot](#)



[Technology Partner Enablement Snapshot](#)



[Implementation & Service Partner Enablement Snapshot](#)



[Customer Referral Partner Enablement Snapshot](#)



[Affiliate & Influencer Partner Enablement Snapshot](#)



[Affiliate & Influencer Partner Enablement Snapshot](#)



[Outsourced Sales Partner Enablement Snapshot](#)



[Pro Tips](#)

Reseller/Channel Partner Enablement Snapshot

Goal: Turn resellers into confident, quota-crushing sellers of your solution.

Core Components:

- Welcome Kit: Program overview, incentives, key contacts, FAQs.
- Sales Training: Value prop, ideal customer profile, demo scripts, sales battlecards, objection handling, competitive positioning.
- Deal Registration & Process: Step-by-step for registering deals, tracking status, and getting paid.
- Marketing Support: Co-brandable collateral, campaign-in-a-box, email templates.
- Ongoing Support: Regular check-ins, updates on product changes, access to a partner portal.
- Incentives: Clear commission structure, spiffs, and recognition for top performers.

Snapshot Checklist:

- Welcome kit sent & acknowledged
- Sales training completed (live or on-demand)
- Deal reg process demoed
- Collateral & campaigns accessible
- First check-in scheduled

Technology Partner Enablement Snapshot

Goal: Empower tech partners to integrate, co-market, and co-sell.

Core Components:

- Integration Guides: APIs, solution architecture diagrams, sandbox/demo access.
- Technical Training: Bootcamps, certifications, access to pre-sales engineers.
- Joint Value Messaging: Shared ICP, use cases, co-branded decks.
- Co-Marketing Toolkit: Joint webinars, event sponsorships, campaign templates.
- Support Channels: Slack/Teams group, tech support contacts, regular syncs.

Snapshot Checklist:

- Integration guide delivered
- Technical training/certification complete
- Joint value prop reviewed
- Co-marketing plan agreed
- Support channel live

Implementation & Service Partner Enablement Snapshot

Goal: Make sure service partners can deliver and support your solution flawlessly.

Core Components:

- Onboarding Playbook: Product deep dive, implementation checklists, troubleshooting guides.
- Certification: Required for complex solutions; badges for completion.
- Customer Journey Maps: Step-by-step for onboarding, support, escalation.
- Resource Hub: Access to documentation, support, and escalation contacts.
- Feedback Loop: Regular Q&A, office hours, and feedback sessions.

Snapshot Checklist:

- Onboarding playbook delivered
- Certification earned (if required)
- Customer journey map reviewed
- Resource hub access granted
- Feedback session scheduled

Customer Referral Partner Enablement Snapshot

Goal: Make it brain-dead simple for happy customers to refer you.

Core Components:

- Referral Program Overview: How it works, what's in it for them, payout timeline.
- Referral Tools: Easy-to-use links, forms, or in-app widgets.
- Templates: Pre-written intro emails, social posts, or DM scripts.
- Recognition: Public shoutouts, badges, or bonuses for top referrers.
- Progress Updates: Let referrers know what happened with their lead.

Snapshot Checklist:

- Referral program explained
- Referral tools tested
- Templates shared
- Recognition plan in place
- Update cadence set

Affiliate & Influencer Partner Enablement Snapshot

Goal: Equip affiliates and influencers to spread the word (and track every click). Note: also works for go-to-network motions.

Core Components:

- Affiliate Portal: Unique links, dashboards, payout tracking.
- Content Kit: Banners, videos, blog templates, swipe copy.
- Guidelines: Brand voice, compliance, dos and don'ts.
- Performance Feedback: Regular stats, leaderboard, and optimization tips.
- Incentives: Clear payout structure, bonuses for volume or quality.

Snapshot Checklist:

- Portal access granted
- Content kit delivered
- Guidelines reviewed
- First post/campaign live
- Performance review scheduled

Outsourced Sales Partner Enablement Snapshot

Goal: Make outsourced sales teams as effective as your own.

Core Components:

- Sales Playbook: ICP, messaging, demo flows, objection handling.
- Onboarding Bootcamp: Live or recorded training, shadowing top reps.
- CRM Access: Deal reg, pipeline visibility, reporting.
- Regular Syncs: Weekly pipeline reviews, deal strategy sessions.
- Recognition: Shoutouts, bonuses, or contests for top performers.

Snapshot Checklist:

- Playbook delivered
- Bootcamp complete
- CRM access granted
- First pipeline review set
- Recognition plan in place

Pro Tips for Enabling All Partner Types:

- Centralize all resources in a single portal or hub.
- Make training modular and on-demand.
- Gamify learning and reward engagement.
- Collect feedback and update enablement regularly.
- Track enablement KPIs (training completion, time to first deal, partner NPS).

Milestone & Goal-Setting Templates

You can get a copy of a Google Sheets template with all of these [here](#).

Milestone Roadmap Template

Milestone	Owner	Target Date	Status	Notes/Next Step
Launch referral program	Priya	May 15	On track	Beta testers recruited
Onboard 5 new partners	Sam	June 30	At risk	2 signed, 3 in pipeline
Generate \$250k in pipeline	Alex	July 31	Pending	First \$50k sourced in June
First partner deal closed	Priya	Aug 15	Achieved	Celebrate & share case study

How to use it:

- Assign a real owner (not "the team").
- Set honest, specific dates.
- Update status every month.
- Add notes so you know what's blocking progress or what's working.

Goal-Setting Tracker

Goal Type	Target	Current	Gap	Owner	Due Date	Progress/Notes
Net-new revenue	\$1M	\$0.4M	\$0.6M	Alex	Dec 31	Q2 pipeline strong
Referrals	100	20	80	Priya	Sep 30	Need customer campaign
Partner signups	10	2	8	Sam	Jun 30	Events planned for Q2

How to use it:

- Be ruthless about what counts as "current" (no wishful thinking).
- Use the "Gap" column to focus your next move.
- Update progress/notes every review cycle.

Celebration & Accountability Board

Milestone	Achieved By	Date	How We Celebrated
First partner-sourced deal	Sam	May 2	Shoutout in all-hands
100th referral	Priya	June 12	Gift card + LinkedIn
\$1M in partner pipeline	Alex	July 30	Team lunch

How to use it:

- Share this board in your team meetings or partner newsletters.
- Don't skip the celebration-recognition fuels momentum.

Quarterly Goal Review Template

Goal/Milestone	Target	Actual	Met?	What Worked	What Blocked Us	Next Steps
Onboard 5 new partners	5	3		Event outreach	Slow onboarding	Streamline process
\$250k in pipeline	\$250k	\$200k		Referral surge	Low close rate	Enablement refresh
Launch referral program	May 15	May 10		Beta testers	-	Scale to all customers

How to use it:

- Be honest about what worked and what didn't.
- Use "Next Steps" to set your new priorities for the quarter.

Pro Tips

- Keep all templates in a shared doc or dashboard so everyone's on the same page.
- Update monthly or quarterly-don't let these become "set and forget."
- Celebrate progress, but don't sugarcoat the gaps. Real talk leads to real results.

About SoundGTM

We're painfully familiar with the challenges tech companies and workers face today because we've been in your shoes. Normal revenue channels and business development models are bone dry and the law of diminishing returns feels like it kicked in ages ago. Businesses and individuals are both staring down uncertain futures.

We believe that growth-stage companies deserve more control over their own destiny and shouldn't have to struggle with spreadsheets, finance, and administrivia just to drive referrals. That's why we created SoundGTM.

SoundGTM is the only referral platform built specifically for growth-stage businesses to expand their reach, fill their sales funnels, and drive net new revenue. And it's all without the time, expense, and headache of traditional referral programs.

www.soundgtm.com