

Partner Enablement Guide Template

Use this guide to organize a partner's journey through qualification, onboarding, enablement, selling, marketing, support, and renewal. Complete requirements and commercial details from the approved program documents and keep track-specific rules clearly labeled.

Complete the bracketed fields with approved information for the product, organization, or program being documented. Repeat the named forms where several tasks or subjects need separate records. Remove sections that do not apply and retain links to the material used to complete the document.

Document control	Entry
Document identifier	[Identifier used by your team]
Scope and applicable version	[Product, program, locations, and version covered]
Prepared and maintained by	[Responsible role or team]
Revision and review	[Revision, review date, and approval reference]

Program Overview

Explain the program's purpose and the partner models it supports. Give readers enough context to choose the correct track and understand how later parts apply to them.

Field	Complete with
Program identity	[Program, offering, audience, regions, and current version]
Partner models	[Partner types, business models, tracks, and relevant scope]
Roles and journey	[Program roles, partner responsibilities, phases, and main handoffs]
References	[Approved program documents, portal, terms glossary, and question route]

Program Structure and Requirements

Keep eligibility, benefits, and fees traceable to the program's authoritative rules. Separate tiers or tracks where a single comparison would be unclear.

Field	Complete with
Track or tier	[Designation, intended partner, geography, and applicability]
Qualification	[Approved eligibility, prerequisites, scoring or points, and evidence]
Benefits and fees	[Approved benefit, entitlement, fee or cost reference, and conditions]
Changes and exceptions	[Review process, exception authority, and source for current requirements]

Joining and Onboarding

Document the joining sequence and the evidence that activates the partnership. Keep agreement references separate from portal and user-setup instructions.

Field	Complete with
Enrollment	[Application task, required information, eligibility check, and review role]
Agreement reference	[Approved agreement or program terms, required authority, and completion record]
Portal setup	[Account, role, access, activation, and first-use checks]
Activation plan	[Initial goals, activities, dependencies, responsible roles, and completion evidence]

Repeat this procedure for each supported task or variant. Place the applicable warning before the affected action and record a result that can be checked.

Step	Action	Expected result	Evidence
1	[One action using the exact interface label or approved command]	[Observable state]	[Check or record]
2	[Next action in dependency order]	[Observable state]	[Check or record]
3	[Verification or handover action]	[Completion condition]	[Retained evidence]

Training and Certification

Create a path for each partner role the program supports. Distinguish completion of learning from an awarded certification and cite the program's actual requirements.

Field	Complete with
Learning path	[Role, prerequisites, courses, sequence, and resources]
Lesson or practice	[Skill, explanation, demonstration, activity, feedback, and expected result]
Certification	[Approved exam or assessment, eligibility, registration, validity, and renewal reference]
Tracking and help	[Completion evidence, credential record, support route, and unresolved need]

Selling

Keep sales rules and the procedure used to submit a request separate. Record the information and evidence required for a deal registration or co-selling handoff.

Field	Complete with
Sales rules	[Approved registration, conflict, pricing, discount, quoting, or license policy reference]
Opportunity task	[Deal or request type, prerequisites, required fields, and partner role]
Submission and review	[Actions, review role, acceptance evidence, and status tracking]
Handoff and exceptions	[Co-selling responsibilities, decision route, and exception or dispute reference]

Repeat this procedure for each supported task or variant. Place the applicable warning before the affected action and record a result that can be checked.

Step	Action	Expected result	Evidence
1	[One action using the exact interface label or approved command]	[Observable state]	[Check or record]
2	[Next action in dependency order]	[Observable state]	[Check or record]
3	[Verification or handover action]	[Completion condition]	[Retained evidence]

Marketing

Use approved program rules for marketing funds, campaigns, and brand use. Keep the claim procedure connected to its evidence and review requirements.

Field	Complete with
Marketing activity	[Campaign, co-marketing, fund, or asset request and applicable program]
Approved rules	[Eligibility, brand use, permitted activity, and governing policy reference]
Request or claim	[Required information, evidence, submission steps, and reviewer role]
Outcome and records	[Approval, activity evidence, claim disposition, and record reference]

Support and Escalation

Explain the support available to the partner's track and how to request it. Keep entitlement, severity, and escalation information tied to the approved program reference.

Field	Complete with
Support entitlement	[Tier or track, supported issue, channel, and applicable conditions]
Case submission	[Required information, redacted evidence, access, and submission procedure]
Escalation	[Trigger, responsible role, alternative channel, and requested decision]
Closure	[Resolution, validation, partner communication, and retained case reference]

Performance Compliance and Exit

Record the measures and reviews used by the program and the approved rules for renewal or exit. Keep a review observation separate from the formal decision it may support.

Field	Complete with
Business plan and scorecard	[Objective, agreed measure, data source, review point, and evidence]
Program review	[Qualification or tier review, responsible roles, criteria, and outcome]
Renewal and concerns	[Approved renewal, compliance, probation, or issue-resolution process]
Exit	[Approved notice, post-exit obligations, access and assets, and completion record]

Program Reference

Keep common program terms and questions in one place. Link answers to the policy or process that establishes them and identify the current authoritative version.

Field	Complete with
Term	[Program term, tier, track, or abbreviation and definition]
Question	[Common partner question and applicable scope]
Answer and source	[Approved explanation, policy or task reference, and version]
Support and change	[Contact route, guide owner, update request, and change history]