

Channel Partner Agreement Checklist

The basics to nail down before setting up a reseller or referral partner relationship.

Partnership Type

- ☐ Referral only (partner sends leads, you close and pay a fee)
- ☐ Reseller (partner sells your product/service directly)
- ☐ Co-selling (joint effort on shared accounts)

Terms To Define

1. Commission or referral fee structure, and when it's paid
2. Exclusivity: is this partner exclusive in a territory or market, or not?
3. Who owns the customer relationship day to day?
4. What happens if a deal is disputed between partners?

Support & Enablement

1. What training or materials will the partner receive?
2. Who's the point of contact on your side?
3. How will the partner stay updated on product or pricing changes?

Performance Expectations

1. Minimum activity or revenue expectations, if any
2. How performance will be reviewed, and how often
3. What happens if the partnership isn't producing results

Before Signing

- ☐ Terms reviewed by whoever handles contracts or legal
- ☐ Both sides clear on who does what
- ☐ A defined process for resolving disputes