Channel Partner Incentive Programme Planner

A Strategic Framework for Channel Leaders & Sales Operations

Section 1: Executive Overview & Objectives

Company Name: _____

Programme Name: _____

Prepared By: _____

Date: _____

Primary Programme Goals *(Check all that apply)*

- ☐ **Short-Term Sales Lift:** Accelerate immediate deal velocity or end-of-quarter push.
- ☐ **Partner Onboarding:** Decrease time-to-first-sale for newly recruited partner reps.
- ☐ **Lead Generation & Expansion:** Increase co-marketing activities and self-sourced partner deals.
- ☐ **Enablement & Competency:** Build certified partner sales reps and technical specialists.

Primary Success Metric (KPI):

_____

(e.g., $500k in new partner ARR at a maximum 5% incentive cost ratio)

Section 2: Incentive Mechanism & Budget Allocations

Incentive Type	Target Audience	Qualifying Event / Conditions	Reward / Payout	Duration / Terms	Allocated Budget
1. Sales Performance Incentive Funds (SPIFFs)	[ ] Individual Sales Reps [ ] Sales Engineers	_____ _____ _____	$_____ ___ Cash / Gift Card per closed deal Start Date:_____ _____ ___ End Date:_____ _____ ___ $_____ _____		
2. Market Development Funds (MDF)	[ ] Gold Partners [ ] Platinum Partners	Co-Share Split: Vendor: _____% / Partner: _____% Eligible Media: [ ] Webinars [ ] Events [ ] Co-Branded Campaigns	Annual Cap: $_____ ___ per partner entity Ongoing / Annual $_____ _____ ____		
3. Enablement & Certification Rewards	[ ] Sales Reps [ ] Solutions Architects	Completion of: _____ _____	[ ] Gift Card ($____) [ ] Badge [ ] Tier Status Unlock LMS/PRM Sync: [ ] Automated via WahooL		

			MS $_____ _____		

Section 3: Partner Tiering Architecture

Partner Tier	Annual Revenue Target	Certified Reps Required	Base Margin %	MDF Eligible?	Dedicated CAM?
Bronze	$_____	_____ Reps	____%	[ ] Yes [ ] No	[ ] Yes [ ] No
Silver	$_____	_____ Reps	____%	[ ] Yes [ ] No	[ ] Yes [ ] No
Gold	$_____	_____ Reps	_____%	[ ] Yes [ ] No	[ ] Yes [ ] No
Platinum	$_____	_____ Reps	_____%	[ ] Yes [ ] No	[ ] Yes [ ] No

Section 4: Deal Registration & Protection Rules

- **Minimum Deal Value for Registration:** $_____
- **Approval SLA Target:** _____ Hours *(Target: < 48 hours)*
- **Margin Protection Bonus:** Additional _____% discount for registered deals
- **Protection Window Duration:** _____ Days *(Standard: 60–90 days)*
- **Extension Criteria:**

  _____

Section 5: Financial Modelling & ROI Calculator

Formula Reminders:

- **Incentive Cost Ratio (%)** = $\frac{Total\ Budget}{Closed\ Revenue}$ X 100
- **Projected ROI (%)** = $\frac{Closed\ Revenue - Total\ Budget}{Total\ Budget}$ X 100

FINANCIAL TARGETS
Total Programme Budget (SPIFFs + MDF + Enablement): $_____ Projected Pipeline Revenue: $_____ Target Closed/Won Revenue: $_____
CALCULATED METRICS
Target Cost-to-Revenue Ratio (Target: 3% - 8%): _____% Expected Programme ROI: _____%

Section 6: Implementation & Tech Checklist

- ☐ **LMS-PRM Integration:** Verify WahooLMS is connected to CRM/PRM (Salesforce/HubSpot) to trigger rewards automatically upon course completion.
- ☐ **Legal & Tax Compliance:** Confirm tax handling guidelines (e.g., 1099/1042 processing) for direct payouts to individual sales reps.
- ☐ **Portal Collateral:** Upload co-branded marketing templates and incentive rules to the partner portal.
- ☐ **Channel Launch:** Schedule a 30-minute webinar to present the new incentive structure to partner account managers.
- ☐ **Reporting Dashboard:** Establish bi-weekly reporting to track deal registration velocity and payout ROI.

NOTES & REVISIONS



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