

Channel Partner Account Planning



Planning Document

How to Use This Document

This account planning document is designed to help you build and maintain Share of Heart relationships with your channel partners. Complete each section thoughtfully, and review and update this document at least quarterly or after significant events. Use this as a living document that guides your strategic decisions and tactical actions.

This document will help you:

- Document comprehensive partner information
- Analyze goals, roles, and market demand alignment
- Track opportunities and pipeline health
- Measure relationship strength and influence
- Create actionable quarterly plans
- Share insights with your team and leadership

Section 1: Partner Profile & Overview

Partner Name:

Account Manager:

Date Created:

Last Updated:

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Company Information

Headquarters Location:

Number of Locations:

Number of Sales Reps:

Markets Served:

Customer Segments:

Partnership Since:

Key Stakeholders

Partner Business Overview

Describe their business model, competitive positioning, and market reputation:

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Section 2: Goals Analysis

Understanding and aligning with partner goals is the first pillar of Share of Heart relationships.

Partner's Strategic Goals

What are their top 3-5 strategic business goals for the next 12 months?

Revenue and Growth Objectives

Annual Revenue Goal

Growth Rate (%)

Market Share Goal

How Our Partnership Supports Their Goals

How can our products and partnership help them achieve each of their strategic goals?

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Key Stakeholder Motivations

What are the personal motivations and career goals of key stakeholders? How can we support these?

Section 3: Roles & Responsibilities Matrix

Clear role definition eliminates confusion and maximizes the effectiveness of both parties.

Our Commitments and Responsibilities

Product Training

Technical Support

Marketing Support

Deal Support

Market Intelligence

Strategic Planning

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Partner Commitments and Responsibilities

Sales Activities

Customer Relationships

Implementation

Customer Support

Feedback & Intelligence

Marketing Execution

Communication Protocols

Regular Check-in Cadence:

QBR Schedule:

Escalation Path:

Preferred Communication Channels:

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Section 4: Market Demand Assessment

Understanding market demand ensures your joint efforts target real, addressable opportunities.

Target Market Analysis

What customer segments represent the best opportunities for our products through this partner?

Customer Pain Points and Needs

What are the primary pain points and unmet needs of target customers?

Competitive Landscape

Market Trends and Opportunities

What emerging trends or market shifts create opportunities for our partnership?

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Barriers to Adoption

Section 5: Opportunity Pipeline

Track specific opportunities and their progress through the sales cycle.

Pipeline Health Metrics

Total Pipeline Value:

Weighted Forecast:

Number of Active Opportunities:

Average Deal Size:

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Section 6: Relationship Health Assessment

Evaluate the current strength and trajectory of your relationship and influence.

Stakeholder Relationship Strength

Rate each key stakeholder relationship on a scale of 1-5 (1=Weak, 5=Strong)

Share of Heart Indicators

Rate each indicator on a scale of 1-5 (1=Strongly Disagree, 5=Strongly Agree)

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Partner proactively brings us opportunities

Partner actively recommends our solutions to customers

Partner seeks our input on strategic decisions

Partner invests time in learning about our products

Partner responds quickly to our requests

Partner prioritizes our products over competing solutions

Partner shares valuable market intelligence with us

Total Score (out of 35)

Recent Wins and Challenges

Recent Wins (Last Quarter):

Recent Challenges (Last Quarter):

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Relationship Trajectory

Is the relationship improving, stable, or declining? What factors are driving this trajectory?

Section 7: Quarterly Action Plan

Define specific initiatives and actions for the next quarter to strengthen the partnership.

Quarter/Year:

Strategic Initiatives

Resource Requirements

What resources, budget, or support do you need to execute this plan?

Key Risks and Mitigation Strategies

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Notes and Additional Observations