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Nexio

Resource Document

FREE TOOL

Free Partner Portal Launch Checklist

Purpose

Use this checklist before inviting your first partners into a new portal.

1. Strategy

+ Define the purpose of the portal in one sentence.
+ Decide what success means in the first 90 days.
+ Identify the first partner segment you are launching to.
+ Clarify which partner actions you want to drive first.

2. Core Portal Experience

+ Confirm the homepage shows only the most useful modules.
+ Make sure navigation labels are clear to partners, not internal teams.
+ Check that partner users can find training, deals, resources, and support quickly.
+ Remove empty or placeholder sections before launch.

3. Content and Assets

+ Upload current sales and marketing assets.
+ Add a short portal welcome message.
+ Include at least one onboarding guide.
+ Add a clear deal registration explanation.
+ Add MDF guidance if applicable.
+ Make sure outdated files are removed.

4. Tier and Program Logic

+ Define partner tiers clearly.
+ Document the criteria for each tier.
+ Explain benefits and expectations.
+ Make sure any points or thresholds are easy to understand.

5. Onboarding and Enablement

+ Create a first-login journey.
+ Define the first three actions a new partner should take.

+ Add at least one introductory training or certification path.
+ Include a contact point for support.

6. Deal and Workflow Readiness

+ Test deal registration from the partner side.
+ Check approval routing and internal ownership.
+ Confirm email notifications work.
+ Test MDF submission and approval if included.

7. Branding and Trust

+ Add your logo, colors, and program name.
+ Check copy for consistency.
+ Remove any dummy text.
+ Replace all placeholder domains, emails, and customer examples.

8. Launch Readiness

+ Invite internal testers first.
+ Check the portal on desktop and mobile.
+ Verify user permissions by role.
+ Send a simple launch email with login instructions.
+ Have a short feedback form ready for partners.

9. First 30 Days After Launch

+ Track logins and activation rate.
+ Watch which modules partners use most.
+ Review support questions for friction points.
+ Clean up low-value sections fast.
+ Collect direct feedback from at least five partners.

Final Prompt for Yourself

If I were a partner seeing this for the first time, would I immediately understand what to do, why it matters, and where to go next?