

A man and a woman are sitting at a desk in a modern office, looking at a laptop. The woman is on the left, wearing a maroon shirt, and the man is on the right, wearing a dark blue shirt and glasses. They are both smiling. The background shows a brick wall and a glass partition.

extu[®]

The Partner Marketing Playbook

01 Set Audience Targets & Goals

Instructions: Identify who you're targeting and how your channel marketing plan ties into your company's sales goals.

Company-wide revenue goal:

Targeted channel revenue contribution:

What % growth are you targeting in partner-sourced revenue?

Partner Segment	Tier (Based on Revenue)	Priority (Based on Potential)

Audience segment(s):

- New partners
- Top-tier partners
- Mid-or low-tier partners
- Specific verticals or regions
- Others: _____

02 Assign Stakeholders & Contributors

Instructions: Clarify who owns what and how success will be tracked and shared.

Name	Department	Role in Strategy	Accountable for	Reports to

03 Choose Your KPIs

Instructions: Identify the key performance indicators (KPIs) that will show whether you're on track to reach your campaign goals. Start by reviewing your goals. What does success look like? Then choose a mix of:

- **Lagging KPIs** that measure outcomes (e.g., revenue, leads closed)
- **Leading KPIs** that predict future performance (e.g., email open rates, campaign launches)



Tip:

Think of your goal as the destination—your KPIs are the signs that tell you if you're getting closer.

Lagging KPIs: (performance-based)

- Revenue generated
- Deals closed
- Pipeline influenced
- ROI achieved
- Incentive redemptions

Leading KPIs: (predictive)

- Email open rates
- Campaigns launched
- Partner logins
- Asset downloads
- Training completions

Instructions: List leading and lagging indicators for tracking campaign success

Lagging KPIs: (performance-based)

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-
-
-
-

Leading KPIs: (predictive)

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-
-
-
-

Instructions: Use this table below to document each KPI you plan to monitor. Indicate whether it's a leading or lagging indicator, who is accountable for it, which tool will be used to track it, and how often it will be reviewed.

KPI	Type	Owner	Tool	Review Cadence
<i>Ex., "12% email click-to-open rate"</i>	<i>Ex., "Leading"</i>	<i>Ex., "Casey Jones, Marketing Director"</i>	<i>Ex., "Extu's Partner Experience Platform"</i>	<i>Ex., "Biweekly"</i>

04 Plan a Marketing Campaign

Instructions: Define campaign goals, timing, and messaging.

Campaign Name:

Targeted Launch Date:

Key Messaging Pillars

-
-
-

Milestones (e.g., asset completion, partner training, launch)

-
-
-

Main CTA:

05 Map Out Media Channels

Instructions: Identify where and how you'll reach your partners

Social Media

Hashtags to use: #

Who to @mention:

Engagement tactic:

Poll Comment Prompt

Other:

Webinars & Virtual Events

Topic(s):

Speakers/Hosts:

Registration CTA:

Promotion strategy:

Email Social

Paid Ads

Email Marketing

Cadence: Weekly Biweekly

Monthly

Subject Lines to A/B Test

• A:

• B:

Primary CTA:

Paid Media

Channels (e.g., LinkedIn Ads, Google Display):

Targeting parameters:

Budget range:

Other Media

Cadence:

Format: Live On-demand

Static content

Partner Co-Branded Content

Asset type: Datasheet Landing Page

Email Template Case Study

Partner approval status:

Drafted In review Approved

Distribution Plan:

Channels:

Format: Live On-demand Static content

06 Build an Incentive Plan

Instructions: Match rewards to your desired actions.

Behavior to Incentivize:

Reward Type: Points Gift Card Rebates Tiered Bonus

Partner Action	Rewards	Fulfillment Tool
<i>Ex. "Submit warranty registrations."</i>	<i>Ex. "Reloadable debit card funds"</i>	<i>Ex. "Extu Partner Experience Platform."</i>

07 Identify Your Tech Stack

Instructions: Ensure each part of the plan is supported by the right platform.

Function	Tool/Platform	Owner	Integrates with
Email Campaign			
Incentives			
CRM/Lead Tracking			
Analytics			

Feature Integration Checklist:

- Two-way CRM sync
- Marketing & incentive platform integration
- Real-time reporting
- Co-branded asset distribution
- Mobile-friendly partner access

08 Evaluate & Optimize

Instructions: Capture insights that inform your next strategy.

Pre-Launch Checklist:

- All campaign assets finalized
- Internal training completed
- Partners notified and enabled
- KPIs confirmed and benchmarked

Post-Campaign Review

What worked well?

What missed the mark?

Key lessons for next time:

Metrics vs. goals:





We help companies sell things.

Extu offers incentive, training, marketing, and events solutions to transform what is possible through the channel. Our robust analytics and seamlessly integrated technology deliver proven ROI and revenue growth. Call or follow us for more channel sales and marketing insights!

