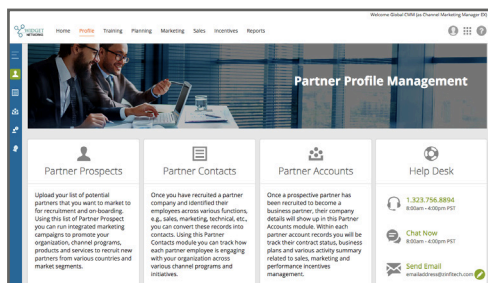# Partner Onboarding Management

The Partner Onboarding Management module of ZINFI's partner relationship management (PRM) platform enables your organization to automate the partner recruitment and onboarding process with a series of step-by-step activities. The module helps you create different onboarding tracks based on partner type, profile, level of engagement and other variables.

Dashboard Management

The Partner Onboarding Management module gives your organization a hawk's eye view and complete control over the new partner engagement cycle. Dashboard management helps your organization define a step-by-step process for on-boarding new channel partners in the existing channel ecosystem.

Using the dashboard management features, your organization can easily define a list of tasks/activities to be completed by the new channel partner during the onboarding cycle, from agreement signing to campaign launch. These features also allow channel partners to review and track completed and still-outstanding steps, helping them monitor their own engagement process.
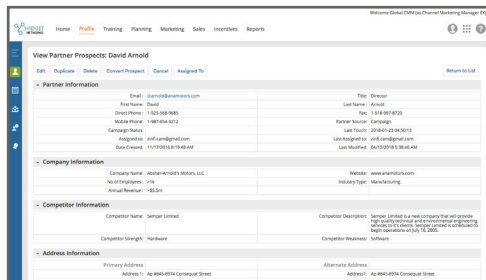

Key Features

✔ New Partner Profile Setup
✔ Training & Certification Setup
✔ Business Plan Approval
✔ Contract Sign-up

Partner Setup Management

Using the Onboarding Management module, your organization can manage partner portal access for newly onboarded channel partners so that partners view and access only the onboarding steps that apply to them.

With our partner setup management features, once channel partners sign contracts they will have access to various partner training materials (certifications, courses and tests) based on your configuration of the partner profile. Channel partners receive automated system notifications for each activity performed during this phase, keeping them posted on the progress they have made.
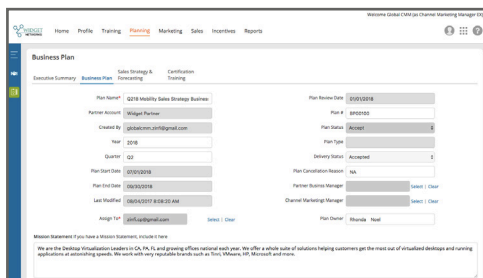

Key Features

✔ Contract Sign-up & Management
✔ Partner Profile Configuration
✔ Training Assets/Program Management

Business Planning Management

The Partner Onboarding Management module allows your organization to define a business plan with each newly onboarded channel partner. Partners can learn more about marketing the products they'll be selling to the target audience by viewing assets and undergoing training via a learning management system (LMS) that provides relevant content based on your configuration.

With the business planning management features of our Partner Onboarding Management module, you can set up business plan templates for onboarded channel partners to review and sign before initiating marketing activities. Channel partners have a dashboard view informing them of the progress they've made and the activities to be completed before moving on to the next step.
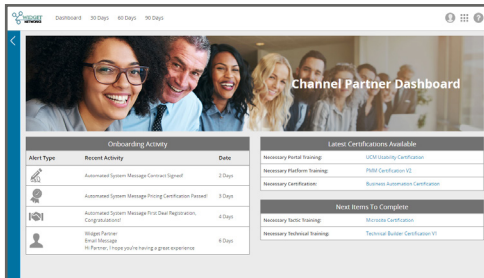

Key Features

✔ Business Plan Management
✔ Asset Management
✔ Learning Management

Partner Enablement Management

After newly onboarded channel partners have completed onboarding and certification steps, your organization can use the Partner Onboarding Management module to guide partners through the entire enablement cycle, providing access to relevant marketing campaigns for execution.

Using the partner enablement management features of our Partner Onboarding Management module, you can enable certified channel partners to view marketing campaigns and deploy appropriate tactics to reach their target audience. Each launched campaign can be tracked through the partner portal in real time so your organization and your channel partners have instant insight into the campaign results as they happen.

Key Features

✔ Campaign Management
✔ Lead Management
✔ Reports & Analytics

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