

Partner Interviewing and Onboarding Process

Product Roadmap Example

Why

What's the purpose?

We don't have a consistent or robust process for ensuring that prospective partners meet our standards, especially when interacting with our clients. There is a risk that clients won't receive the experience they expect, which will negatively influence their perception of and relationship with our company.

To ensure partners are set up to succeed, we need a robust, consistent, and calibrated process for vetting and onboarding them.

What

Includes desired outcomes or business objectives. What does success look like?

- Clients tell us how much they enjoy and value our partners
 - Partners represent our brand well
 - Partners integrate well into the team because they have a full understanding of what we're about
 - We don't need to sever ties with any partners because it doesn't work out (different than natural separation)
-

How

Timeline and themes, user stories, checklists, etc.

Theme	Near Term	Mid Term	Long Term
Data / Technology	<p>Add partner network to Airtable to organize</p> <p>Ensure accuracy of information in Airtable</p>	<p>Create process for adding all candidates to Airtable</p> <p>Ensure scorecards are uploaded</p>	
Interview Process and Criteria	<p>Propose initial interview process to test</p> <p>Determine functional criteria for immediate partners based on responsibilities and expectations</p> <p>Determine how culture framework applies to partners and adjust interview accordingly</p>	<p>Adjust interview process based on experiment</p> <p>Align on functional criteria and process for next projected partners</p> <p>Equip Main Contact with email templates to communicate with candidate/partner</p>	<p>Create material outlining partnership process and experience to share early on with prospective partners</p>
Onboarding Process	<p>Create more cohesive doc with Vision, Mission, Values</p> <p>Capture first draft of client experience expectations</p>	<p>Figure out legal model (incl. contracts, \$, etc.)</p> <p>Onboard partners via calls and walk them through docs, questions, etc.</p>	<p>Build out more robust materials to share with “hired” partners based on what resonated throughout experiments</p>
Interviewers	<p>Interviewers meet after each set of interviews to retro and calibrate</p>	<p>Interviewers meet after each set of interviews to retro and calibrate</p>	<p>Interviewers meet after each set of interviews to retro and calibrate</p> <p>Eventually certify all team members to conduct culture interviews</p>

Disclaimer: This is a living document, not a commitment, and therefore is subject to change.