

GRMS Referral Partner Implementation Checklist

Item	Description	Assigned To:	Completed
1.	<p>Sales Organization</p> <p>Provide an organization chart for the sales and client success teams with email and phone contact information.</p>		
2.	<p>Partner Training</p> <p>Schedule on-line training to provide a high level overview of GRMS' services with Partner's management, salespeople and client success team. Emphasize the goal is to "introduce" not "sell" GRMS.</p>		
3.	<p>Create co-branded Flyer and co-branded Website Page</p> <p>Provide GRMS with an EPS format logo and contact information (address, email and phone number) for an electronic co-branded flyer. A co-branded website page can also be created.</p>		
4.	<p>Partner's Website</p> <p>Possibly add a description of GRMS' services to Partner's website.</p>		
5.	<p>Partner Webinar</p> <p>Schedule a webinar for Partner's clients and prospects to introduce an overview of GRMS' Supplier Risk Assessment Programs.</p>		
6.	<p>First Referrals</p> <p>Identify 5 existing clients we can approach together within the first 60 days.</p>		
7.	<p>Monthly Status Calls</p> <p>Schedule monthly status calls for the first 12 months.</p>		
8.	<p>Partner Conference (if applicable)</p> <p>Determine most effective way to promote partnership during conference (i.e. speaking, break-out sessions, sponsorships and other marketing opportunities).</p>		
9.	<p>Additional Discussion Points</p> <p>A Lead becomes a referral after the Discovery call White Papers Salesperson's page for their deck What is salesperson's commission?</p>		

Should you have questions regarding this information, please contact your GRMS Referral Partner Implementation Manager.