**Reseller Sign-Up and Orientation Process**

Once a reseller applies we take them through the process which is in our follow-up worksheet.

First, go to their website and confirm they are a reseller. Next comes extreme follow up by our channel manager (not hard, but we must ensure it happens).

1. Transfer them to the reseller follow-up worksheet so we can track the steps.
2. Setup their portal name and password (usually the email and a general password (they can change in the portal) - password123)
3. Setup their NFR copy (get the code, whatever our process requires)
4. Send them the approval email with the portal info, the NFR info and the times for the orientation.
5. Call them up immediately to confirm they got it (the above should happen within the first 15 minutes of their application whenever possible) and to get them booked into an orientation meeting.
6. Conduct the orientation meeting (demo the portal site (we need to review the steps (I can give a model of how it is done)), demo the product (Powerpoint/Product combination), explain the 90 day promotion, make sure they know how to place an order). Also, schedule the next meeting with them--the Marketing Meeting (we will review promotions where we can help them get leads, but also help them get the product description setup on their website).
7. Conduct the marketing meeting (see Marketing Meeting Kit (has to be re-purposed before the meeting))
8. Put the marketing deliverable dates on your calendar (we will follow up on those dates to help them execute)
9. Create the first partner news email (does not have to be fancy--but we need to start communicating with our sales team)
10. Remind partners of the 90 day promotions and help them register their deals. We then help them complete their first demos, their first quotes and send them a thank you email when we see their first sales.

It is important at this stage to get all of this done to ensure we get our channel selling--not just signed up.

Attached:

- Follow up worksheet (template and sample)

- Portal overview script

- Approval email - to customize

- Follow-up email (for any that have not signed up or attended the orientation)