



How to identify your affiliate program goals

This worksheet will help you envision what success looks like for your affiliate program, choose the correct metrics to measure that success, and identify the steps you and your team need to take to get there.



**Interactive
worksheet**
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You can't start a journey without a destination in mind. Goals allow you to picture where you want to be and map out how best to get there.

Use this worksheet to build a successful and sustainable affiliate program. You begin by setting achievable goals and a reliable framework in which you can evaluate your results.

How to use this worksheet

Look over the example table on page 3 and use it as inspiration for your own plan. Page 4 has a table where you can list your own program goals for the upcoming quarter or half year and how you will execute them.

- First, write your program goals and metrics in the first 3 columns.
- Next, list your strategy for achieving each goal in the final column.

Tips to get started

- Find out your company's business goals and consider how your program can help drive success. For example, if your company wants to acquire new customers, you can support this goal by providing higher commission rates for referrals.
- Think about what's a realistic goal considering your budget and resourcing.
- Collaborate on your goals with your manager to ensure they align. Together, you can validate whether your goals are overambitious and need to be dialed back or if there's room to be more aggressive by creating stretch goals.

Guidelines for success

- List more than one way to work toward achieving each goal.
- Look at your past performance to determine whether your goals are realistic.
- Reach out to your manager for help if you're having trouble defining your program goals.
- Set a realistic number of goals. Organizations typically identify three or four program goals and one or two "stretch" goals per period.

Example affiliate program goals table

This example goals table is filled out with potential goals, metrics, and strategies.

| EXAMPLE • EXAMPLE • EXAMPLE • Affiliate program goals table • EXAMPLE • EXAMPLE • EXAMPLE | | | |
|---|--------------------------------------|-----------|---|
| Program goals | Current | Goal | Strategy to execute |
| Increase revenue | \$100.2m | \$112.5m | Recruit new partners, increase commission on percent of sale, optimize performance of top partners |
| Acquire new customers | 10k/month | 50k/month | Offer higher commission rate for acquiring new customers |
| Increase app downloads | 1k/month | 5k/month | Forge new relationships with mobile app partners, offer commissions for app downloads or in-app actions |
| Grow customer email list | 5k/month | 8k/month | Offer commission for each new email sign-up |
| Improve return on ad spend (ROAS) | \$2.87 | \$3.00 | Ensure commissions beat ROAS from other digital channels |
| Decrease customer acquisition costs (CAC) | \$10 | \$8 | Ensure commissions beat costs from other digital channels |
| Increase market share | 30% | 35% | Offer more competitive commissions than direct competitors |
| Increase customer lifetime value (CLV) | \$150 | \$200 | Work with loyalty partners, offer recurring commissions for subscriptions |
| Increase profit margin | 10% | 12% | Offer higher rates for higher margin products and lower rates for lower margin products |
| Increase website traffic | 300k unique visitors per month (UVM) | 400k UVM | Recruit new partners that will provide access to new audiences, improve communication with existing partners, and alert all partners to upcoming deals and promotions |

Affiliate program goals table

Use this table to fill in your goals, metrics, and strategies.

Limiting the number of goals will ensure that each goal is achievable.

| Affiliate program goals table | | | |
|-------------------------------|---------|------|---------------------|
| Program goals | Current | Goal | Strategy to execute |
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Action items

Now that you've set the goals, adjust your program to help you achieve them.

1. Update your contract rates and terms based on the program goals you define. For example, if you have a goal of acquiring new customers, consider increasing your payout rate for partners when they refer new customers.
2. Adjust your program management strategy, including recruitment, partner communication, publisher activation, etc., to effectively reach your goals. Download this worksheet on how to recruit prospective affiliates and achieve a deep level of engagement to help them succeed.

Want to hone your affiliate program even more?

Check out these resources:

- [Partnerships Experience Academy](#) (training)
- [13 best practices for affiliate partnerships](#) (ebook)
- [Ultimate guide to affiliate marketing](#) (ebook)
- [How to analyze competing affiliate programs](#) (worksheet)