

How to effectively set up your publisher contracts

Download this worksheet to streamline the process of planning contract templates. Prebuilt contracts make partner onboarding quick and easy.



**Interactive
worksheet**
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Contracts are central to your partnership program. The contract determines the payout rates for partner referrals to your brand. Getting it right will keep your partners engaged and your affiliate program competitive. However, creating a new contract for each partner bogs down and overcomplicates the process.

Most brands bucket publishers into easy-to-manage contract templates rather than create new contracts for each publisher. The partner type (e.g., loyalty, content, coupon, etc.) determines how to organize these templates.

Use this worksheet to plan an effective contract template for each partner type.

1. Which partner type does this contract cover?

(Examples: loyalty, influencer, content, coupon, etc.)

2. Which events do you want to pay out and/or see in reporting?

Include in the contract (as a zero-dollar payout) events you choose not to pay out but want to see in reporting.

(Examples: track newsletter signups and app installs, pay for sales.)

3. Your baseline payout rate exists as your public-facing commission rate for affiliates. Consider how your rates support your channel goals and key performance indicators (KPIs). Compare your rates to your competitors' rates, and leave room to negotiate with top publishers.

What baseline payout rate will you set for your public terms?

(Examples: \$5 flat fee per lead, 8 percent of order or sale amount, etc.)

4. You may configure your contract templates to include different commission structures for certain items.

Which items do you want to pay out differently than your baseline payout rate?

(Examples: Higher payouts for high-margin items, lower payouts for low-margin items, etc.)

5. Where would adjusted payouts contribute to reaching your program goals? For example, if your goal is to acquire new customers, consider increasing commissions for new customers. Or, if your affiliates face restrictions from using certain promo codes, reduce or remove payouts for those codes.


What are your parameters for adjusting payouts in this contract template?

(Examples: Higher payouts for new customers, no payout for promo codes from another channel, etc.)

6. Performance bonuses offer an excellent way to incentivize partners to drive more traffic to your program. For example, you may choose to increase payouts if a partner drives a certain amount of revenue in a given month.

How will you use performance bonuses to incentivize partners?

(Examples: Increase payout by 2 percent when a partner drives more than \$5k in revenue during a given month.)

 **Pro tip:** The best partnerships programs include contracts that properly align payouts to the value publishers deliver to your business. Consider your top competitor's program terms to ensure that your rates are attractive to prospective publisher partners.

7. Make your action-locking window longer than your brand's return window. You'll then have enough time to send in reversals and modifications and avoid payouts for returned items.

How long of an action-locking window will you establish for this contract template?

(Example: Actions lock 15 days after the end of the month.)

8. Set up your payout schedule so your finance team has enough time to fund the account before payments are due. Complete the [finance setup timeline worksheet](#) to verify that your payout schedule will give your finance team ample time to make payments.

Which payout schedule will you use for your contract template?

(Example: Actions are paid 30 days after locking.)

9. Your referral window dictates how long a click remains valid to receive credit for an action. Publishers typically prefer longer referral windows since they're more likely to get credit.

How long a referral window will you set in your contract template?

Tip: Consider your competitors' referral windows to ensure you offer competitive terms.

(Example: Allow referrals from clicks that are 45 days old.)

10. Contracts include standard terms by default. However, many brands include special terms such as TM+, toolbar, coupon usage, or gift card commissioning restrictions.

What special terms will you include in your contract template?

(Examples: coupon usage, paid search terms, etc.)

Want to learn more strategies for partner contracts?

Enroll in the free, on-demand Partnerships Experience Academy (PXA) course, [Affiliate marketing contracts and policies](#).

For more ideas on running a successful partnerships program, check out these impact.com resources:

- [Partnership life cycle best practices: Contract and Pay](#) (ebook)
- [How to manage a successful affiliate program today: 6 steps to affiliate marketing success](#) (blog)
- [13 best practices for affiliate partnerships](#) (infographic)