

# How to evaluate partnership compatibility

**Potential partner:**

Use this form to evaluate whether a prospective partner may be a good partner fit based on compatibility and projected business outcomes.



## Summary background

Which business objectives will this partnership address?

What partner type (affiliate, influencer, mobile app, strategic B2B) does this partner represent?

In which geographic markets is this partner active?

What products or types of products do we expect this partner will market for us?

At what points in our customers' journeys will this partnership add value and why?

## Compatibility

### Complementarity

How are our goals complementary? List the top three. Do we understand each others' goals?

### Value exchange

What value does each of us bring to the table? What does each of us need that the other has?

### Brand fit

Does this partner meet our ideal partner criteria? Is there any brand risk? Is their tone and perspective in alignment with ours?

### Endorsement credibility

Would an endorsement from this partner about our product feel credible to our target audience?

### Potential to collaborate

Does this partner have a history of collaboration? Do they exhibit a willingness to collaborate with us? What concerns do we need to address?

### Appropriate touchpoints

Where does this partner connect with their audience/customers (e.g., blog, email, website, social media, mobile app). Is this a good fit for our target customers?

### Competitor status

What does that partnership look like, and what can we do to ensure that the partner prioritizes us over our competitor?

## Audience

Who will this partnership target? Are they one of our target audiences?

How much of this target audience is also this partner's target audience?

What is the size of the target audience from this partnership?

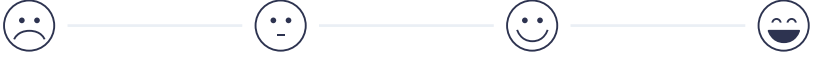
## Stakeholder analysis

What metrics will we use to evaluate the success of this partnership?

What resources is each stakeholder in the partnership contributing?

What risk is each partner taking? How do you plan to mitigate that risk?

Review your answers across the last three pages. What words stand out or repeat? Think about the overall impression your answers make. On a scale of 0–10, with zero being “not at all” and 10 being “highly,” where do we rate our desire to work with this partner?

  
0 1 2 3 4 5 6 7 8 9 10