

Partner Pipeline Confidence Worksheet

Use this for one partner-pipeline number before it affects budget, credit, payout, or board narrative.

1. Decision under review

Partner-pipeline number: _____

Decision it will support: directional report / budget / partner credit / sales credit / board narrative

Owner: _____ Review date: _____ Period: _____

2. Classification

Partner-sourced: partner created or introduced the opportunity before direct sales motion owned it.

Partner-influenced: partner materially helped a deal that may have started elsewhere.

Partner-assisted: partner helped validate, implement, expand, or close after the opportunity already existed.

Current label: sourced / influenced / assisted / adjacent / disputed

3. Confidence band

Directional: useful for learning, not spend, payout, or board claims.

Budget-ready: stable enough for channel-planning decisions with caveats.

Crediting-ready: source, eligibility, timing, exceptions, and disputes are documented and owned.

Board-grade: reconciles to the executive revenue story with caveats documented before the packet.

Source-contract repair first: disputed or manually rescued; do not use for formal decisions yet.

4. Required controls

Source precedence: portal / CRM / campaign / notes / finance record that wins.

Timing cutoff: referral, opportunity, acceptance, close, and commission dates.

Eligibility: partner types, regions, products, account status, and excluded deals.

Association logic: account, contact, opportunity, duplicate, and parent-child rules.

Exception authority: approver, evidence required, and where the ruling is stored.

Reconciliation: booked pipeline, recognized revenue, and partner-payment eligibility are separated.

5. Unsafe uses

This number must NOT be used for: _____

Caveat that travels with the number: _____

First repair before promotion: _____

6. Next action

Repair owner: _____ Due: _____ Next review: _____

Start with Three Teams, Three Numbers when the fight is definition ownership.

Start with SaaS Marketing Attribution when contribution and budget confidence are the issue.

Start with Data Foundation when source precedence, CRM association, or reconciliation cannot hold.