

Co-sell readiness checklist

Use this to assess whether your partner motion is ready to drive results—or if you're still flying blind.

STEP 1

STRATEGIC ACCOUNT PLANNING



- ☐ Have we defined shared target accounts based on clear ICP alignment?
- ☐ Have we mapped current and potential overlap between our accounts and our partner's?
- ☐ Do we have a documented JVP (Joint Value Proposition) that defines goals, roles, and resources?

STEP 2

JOINT MESSAGING & CAMPAIGN ALIGNMENT



- ☐ Do we have shared messaging tailored to the buyer's pain points in priority accounts?
- ☐ Have we developed joint campaigns that reflect shared value—not just feature sets?
- ☐ Are our campaigns tied to specific pipeline goals (e.g., increase velocity, drive POCs, win expansion)?

STEP 3

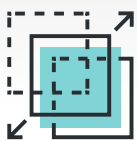
SELLER ACTIVATION & ENABLEMENT



- ☐ Have we created enablement assets that clearly articulate the partner solution value (battlecards, cheat sheets, pitch decks)?
- ☐ Do sellers know which accounts to prioritize and how to engage them?
- ☐ Do we understand how our sales stages map to the partner's methodology, speak their language, and track the metrics that matter to them?
- ☐ Are we tracking seller engagement with partner materials and plays?

STEP 4

TECH & TOOLS FOR SCALE



- ☐ Are we using a tool like PartnerTap to identify overlapping accounts and surface shared pipeline opportunities?
- ☐ Is our partner tech integrated with CRM and campaign tools to measure influence and attribution and can we request/track co-selling?
- ☐ Do we have a repeatable process for updating targets, tracking joint motion progress, and identifying, creating, tracking, and closing co-sell opportunities?

STEP 5

MEASUREMENT & OPTIMIZATION



- ☐ Have we agreed on shared KPIs for success (e.g., meetings set, influenced pipeline, sourced revenue)?
- ☐ Are we telling the story of the momentum—highlighting partnership wins, impact, and the value created by the motion?
- ☐ Are we regularly reviewing dashboards to view performance with our partner counterparts?
- ☐ Is feedback from sellers and buyers informing our ongoing optimization?

SCORECARD GUIDANCE



13–15 checks:
You're ready to operationalize co-sell at scale.



8–12 checks:
Strong foundation—tighten execution gaps.



<8 checks:
Build alignment and infrastructure before scaling efforts.

Not sure where your co-sell motion needs the most focus?
Let's review it together. Schedule a quick consultation with Knack.