

CHANNEL PARTNERSHIP REFERRALS QUALIFICATION GUIDE

1 Ideal Customer Profile (ICP)

Company Size & Stage

- **Annual Revenue:** \$1M–\$30M
- **Team Size:** 1–500 employees
- **Growth Stage:** Scaling or profitability-focused; looking to drive efficiency and lower operating costs

Industry Focus

- Primarily serves SMB and lower mid-market companies
- **Common Industries:**
 - B2B Professional Services (marketing agencies, consultancies, financial services)
 - SaaS / Technology
 - eCommerce / DTC
 - Healthcare Services

Pain Points & Objectives

- Rising headcount costs or bloated operations
- Limited internal capacity for sales, marketing, or customer support
- Difficulty achieving desired margins, customer acquisition cost (CAC) targets, or lead volume
- In need of a structured, data-driven go-to-market engine

Decision Makers

- CEO / Founder
- COO / Head of Operations
- CRO / VP Sales / Revenue / CMO / Marketing

Buyer Readiness

- Willing to invest \$3,000–\$5,000/month for GTM support
- Has internal KPIs in place (CAC, Payback, Margin, LTV, DSO, etc.)
- Seeks measurable outcomes and accountability

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② Partner Qualification Questionnaire

Use this form to qualify leads before referring to Get Levrg

A – Company Snapshot

1. Company name:
2. Website:
3. Industry:
4. Approximate annual revenue:
5. Current team size (full-time employees):

B – Growth Stage & Priorities

6. What stage is the business currently in?
 - Scaling
 - Stabilizing
 - Rebuilding
 - Other: _____
7. Are they currently outsourcing any functions? If yes, which ones?

C – GTM & Sales Process

8. What go-to-market motions are currently in place?
 - Inbound marketing
 - Outbound sales
 - Paid ads
 - Events / Webinars
 - Other: _____
9. Do they use a CRM or sales platform? (Please specify)

D – Pain Points & Needs

10. What are their top 2–3 challenges right now?

- Lead generation
- Cost control
- Sales conversion
- Customer retention
- Other: _____

11. Which services are they most likely to outsource?

- Social Media and Content Marketing
- LinkedIn Engagement
- Website Optimization
- Video Editing
- Sales Data & CRM Optimization
- Go-To-Market Administrative Support
- Agency Fulfillment (White Label Agency)
- Internal Agency
- (Multiple Projects Running Concurrently)
- Other: _____

E – Budget & Readiness

12. Do they have a budget of at least \$3,497/month for support?

13. Who is the final decision maker (name & role)?

14. Timeline to get started:

- Immediately
- Within 30 days
- Within 60–90 days

F – Referral Context

15. Your name (referring partner):

16. Additional notes, context, or pain points we should know about?

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③ Sales-Qualified Referral Criteria

A referral is considered sales-qualified if it meets the following

Criteria	Threshold
Revenue	\$1M+ annually
Team size	1-500 FTEs
Budget	\$3,000/month
Decision-maker identified	✓
Pain point aligns with our services	✓
Timeline to start	≤ 60 days

④ Additional Qualification Strategies

A–Lead Scoring Model

Assign weighted scores to each response
(e.g. budget = 25%, decision-maker = 25%, pain fit = 25%, urgency = 25%)
to help partners assess fit quickly.

B–Partner Enablement Toolkit

Provide:

- One-pager overview of services
- ROI calculator / client success stats
- Partner intro script
- Email templates & follow-ups

C–Feedback Loop + Fast Follow-Up

- Referrals acknowledged within 24 hours
- Partner updated on lead progression
(e.g. Qualified > Discovery Call > Proposal)

D–Payout & Incentives

- **Referral commission:**
5–10% of the monthly subscription
for the first 6–12 months
- Tracked and managed via Euler App
(partner portal, performance
dashboard, resources)