**Partner Onboarding and Management Process:**

**INPUTS:**

1. Partner Data – This includes contact, about the company, employees etc
2. Ideal partner profile – who is our ideal partner.
3. Partner selection criteria – We use this first filter to reach out to potential partners via telemarketing, F2F, email marketing, linkedin
4. Partner onboarding critera – Partners meeting this list are finally onboarded onto the platform.
5. Partner Management – this would include ongoing support to partners, relationship management, prefered partners lists, active and inactive partners, category management,FAQs, collaterals etc.

IDEAL PARTNER:

1. Small to mid size company
2. Focussed on small and mid size clients
3. Domestic and International clients.
4. Works with tier2 and tier3 clients.
5. Quality work –certified by clients
6. Hungry for work
7. Open to new platforms and methods.

PARTNER ONBOARDING CRITERIA:

1. Must be a company and not a freelancer setup.
2. Small and mid size company. (10 to 100 employees)
3. Clients –Indian mid and small sized companies
4. Clients – US market
5. Provides job work and/or talent.
6. From top 40 cities across India.
7. Client testimonials – Build over time.
8. Operational alignment towards BK process.
9. Free Trial – Yes/No

Steps to undertake:

1. Basis a pre-selection criteria we will reach out to relevant agencies to onboard them as partners.
2. Once the client has filled out the onboarding form, we will need to validate the information via their website and a tele-call.
3. Once validated, the partner will be either approved or declined or waitlisted.
4. Process to be carried out within 72hrs of partner application.
5. An email response would need to be sent out along with our most important T&C’s.
6. A potential partner can also reach out to BK for any clarification on the process, commercials, payment mechanism etc.

Onboarding Plan - MVP

The following approaches will be used for onboarding the partners:

1. Telemarketing –
   1. Once we have collated the data from clutch, we will start a telemarketing intiative to convert prospects into leads and leads into partners.
   2. We would need to telecall, prepare a script, have a PDF deck ready along with a mechanism for capturing feedback.
   3. Hire a Telecaller.
2. Digital Marketing -
   1. Email : Using the data collected from clutch, we will send out emails to the potential partners for signups.
   2. Linkedin : Run one campaign on linkedin to generate leads and interest from partners.
3. Face to Face : For certain categories like BPOs we will need to setup face to face meetings.

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| --- | --- | --- | --- | --- |
| Key Action | What is needed | Start | End | Dependency |
| Telemarketing | Database,  Collaterals  Tele-caller | 01 feb  15 feb | 28 feb  10feb  15 mar | Legal |
| Email | Email database | 20 feb | 28 feb | Legal |
| Linkedin | Linkedin account | 01 mar |  |  |
|  |  |  |  |  |

PHASED ONBOARDING:

MVP – Test, iterate, expand.

Mob,Web Development Agencies, Software Development – 20

Digital Marketing – 10

Graphics & Design – 10

BPO- 5

|  |  |  |
| --- | --- | --- |
| Phase | Partners | Project Fulfilled. |
| MVP (AMJ) | 45 | 40 |
| JAS | 100 | 150 |
| OND | 100 | 300 |

Partner Management process:

1. Once a partner fills out the on-boarding form, following status need to be updated:
   1. Approved
   2. Declined
   3. Wait Listed
2. On all of the above, an email needs to go out to the partner to close the loop.
   1. Approved partners – Congratulatory email along with MITC.
   2. Declined partners – Generic email message
   3. Waitlisted –Email message with reason
      1. Incomplete form
      2. More information needed
      3. Information mismatch between website and form.
      4. We have enough partners in that category.
      5. Others
3. A HELPDESK email needs to be provided for partner queries and issues.
4. We would need a MITC page on the partner side giving details on
   1. Commission structure
   2. Nodal mechanism
   3. Milestone management
5. BIDDING: Once a partner is onboarded, they would be allowed to bid for any matching work.
   1. The partner is expected to give the best value bid range for any project.
   2. The final price post speaking to the client should within a reasonable range of the initial bid.
   3. If the partners bid is accepted, they are expected to deliver the project as per accepted bid and timeline.
   4. The partner will setup the milestones, contract in the system.
6. CONSULTANT: The partner will have the ability to reach out to BK consultant for any clarification during the bidding process.
7. ACCOUNT MANAGEMENT : Over time, we will provide dedicated account management for partners to drive engagement, activation rates, loyalty etc. In the interim the partner should have the self serve capability for updating:
   1. Their profile information.
   2. Add new services
   3. Modify bank account details
8. TERMINATION: A partner will have the ability to terminate their contract with BK upon notice to BK. BK will stop sending any new client projects to such partners. Any current projects will be completed as per process.
9. In-case of breach of contract, a partner can be evicted from the platform on the first instance on BKs sole discretion.
   1. In such a case the contract between the partner and BK will stand to be terminated and any ongoing payments would be settled between both parties within 30 days.
   2. If there are multiple projects ongoing for the partner, the partner will be barred from bidding for any new work. Once all current projects are completed, the partner contract will be terminated.
   3. The partner would not be allowed on the platform for at-least 6 months.