FREE TEMPLATE

30-Day Partner Onboarding Checklist

Four phases, two sides: what the program team does and what the partner does.

1. The partnership

Partner organization	**Program**
Kickoff (day 0)	**30-day check-in**
Our onboarding contact (and backup)	**Partner's focal point (and backup)**
Partner's working language(s)	**Peer partner (buddy)**

2. How to use it

1. **Fill in section 1 together** before the kickoff, and set the date of the 30-day check-in now.
2. **Every line has a side:** the program team, the partner or both. Write a named owner, not a team.
3. **Tick a line when it is done** and write the date. Strike out what does not apply; add what is missing.
4. **Bring this sheet to the 30-day check-in.** Section 4 is the agenda.

PROGRAM TEAM your organization PARTNER the new partner BOTH together

3. The checklist

	Who	Action	When	Owner	Date done
Before the kickoff	Days –10 to 0			*Goal: nothing on day 0 is a surprise*	
☐	PROGRAM TEAM	Name one onboarding contact and a backup; tell the partner who they are	Day –10		
☐	PROGRAM TEAM	Gather what you already have (due diligence, assessments): never ask twice	Day –10		
☐	PROGRAM TEAM	Prepare the welcome pack and one-page expectations in the partner's language	Day –5		
☐	PROGRAM TEAM	Invite the partner's people to the platform and shared folders (two or more)	Day –3		
☐	PARTNER	Name a focal point, a backup and the people who will work on the program	Day –7		
☐	PARTNER	Tell us your working language(s) and limits on connectivity, devices or time	Day –7		
☐	PARTNER	Send the documents and assessments you are happy to reuse, and your questions	Day –2		
Week 1: welcome and access	Days 0 to 7			*Goal: everyone knows who, what and where*	
☐	PROGRAM TEAM	Kickoff call, 90 minutes at most: why, how it works, where the partner starts	Day 0		
☐	BOTH	Read the one-pager together and change what does not work for the partner	Day 0		
☐	PROGRAM TEAM	Send notes, welcome pack and calendar the same day, in the working language	Day 0		
☐	PARTNER	Every named person signs in and finds the program, their position and step 1	Day 3		
☐	PROGRAM TEAM	Introduce the finance and safeguarding contacts and a peer partner (buddy)	Day 5		
☐	PARTNER	Say what is unclear or unworkable in the one-pager; agree the final version	Day 5		
☐	PARTNER	Name an owner on your side for each topic of the program	Day 7		

The welcome pack, in the partner's working language

- ☐ A one-page welcome letter: why this program, why you
- ☐ The one-page expectations, both ways
- ☐ The program on one page: stages, topics, where you start
- ☐ Who is who: names, roles, how fast we answer
- ☐ How to raise a concern or complaint about us
- ☐ The calendar: check-ins and reporting dates
- ☐ How to sign in, and who to call if it fails
- ☐ Only the templates needed in the first 30 days

© 2026 Mourinho Solutions. All rights reserved. Advancer Template from the Advancer blog - Advancer.World - the program management platform.

FREE TEMPLATE

30-Day Partner Onboarding Checklist

Four phases, two sides: what the program team does and what the partner does.

3. The checklist (continued)

	Who	Action	When	Owner	Date done
Weeks 2 and 3: baseline and first step	Days 8 to 21			*Goal: one starting point, one step done*	
☐	PROGRAM TEAM	Offer two or three options for the first small step; the partner chooses	Day 10		
☐	PARTNER	Complete the baseline self-assessment with evidence, with the people who know	Day 14		
☐	BOTH	Review the baseline together; where your views differ, record both	Day 17		
☐	PARTNER	Complete the first step and upload its evidence where the step asks for it	Day 21		
☐	PROGRAM TEAM	Answer every question within the agreed time, for example two working days	Ongoing		
☐	PARTNER	Raise problems as they come up, not at the check-in	Ongoing		
Week 4: the first review	Days 22 to 30			*Goal: both sides say what to change*	
☐	PROGRAM TEAM	Recognize the first step, to the partner and (with consent) to the network	Day 22		
☐	BOTH	Hold the 30-day check-in (section 4): both sides answer the same questions	Day 30		
☐	PROGRAM TEAM	Ask the partner to rate the onboarding and you; note one change you will make	Day 30		
☐	BOTH	Agree the next two or three steps and the dates of the 60- and 90-day check-ins	Day 30		
☐	PARTNER	Share the result inside your organization: board, staff and field teams	Day 30		

4. The 30-day check-in: both sides answer

Question	The partner's answer	The program team's answer
1. What is clear about what the program expects? What is not?		
2. Was the first step useful to the partner, not only to the program?		
3. What did each side promise and not do yet?		
4. What takes more time than it should?		
5. The onboarding so far, from 1 (poor) to 4 (clear, useful, on time)		
6. One change each side makes for the next 60 days		

5. Next steps and sign-off

Next steps agreed (two or three)

60-day check-in

90-day check-in

Rhythm after that

Partner's focal point

Program team contact

Date

Date

This checklist sits beside the partnership agreement, not inside it. Both sides keep a copy, and at the check-in the program team reviews its own lines first.

© 2026 Mourinho Solutions. All rights reserved. Advancer Template from the Advancer blog - Advancer.World - the program management platform.