![impact.com logo]

Onboarding success checklist

How to avoid delays and launch on time on impact.com

With equal parts coordination and preparation, onboarding to the impact.com platform can be a breeze. Download this checklist to avoid unnecessary delays and keep the process on track.

Interactive worksheet
Download to use

As you prepare to onboard onto impact.com, use this checklist to ensure you have all the pieces in place to move forward and avoid delays. The process will run more smoothly if all of the relevant teams know what they need to do and have the information they need to do it. Communicating with your teams in advance and scheduling ample time for them to perform their tasks prepares them to hit the ground running.

30 days to impact.com

Most brands successfully onboard to impact.com in less than 30 days. If you opt to use an existing integration to handle tracking (such as impact.com's integration with Shopify), you can reduce your timeframe to less than ten days.

1. Tracking setup

Onboarding delays often relate to your partnerships program tracking setup. Avoid obstacles by getting started with tracking implementation right away. Ensure that your developers:

☐ Know about your tracking integration type

☐ Understand the required scope of work

☐ Have the bandwidth to complete your project before the desired launch date

☐ Can assist with prelaunch testing to accurately setup tracking

Pro tip: Delays may stem from other teams within your organization. Connect with your developers, finance team, legal team, and other relevant teams in advance to guarantee the tasks you need them to accomplish are ready before your target launch date.

2. Finance setup

Coordinate with your finance team early in the process to confirm they'll deliver what you need. As a preventive measure, check that your finance team:

- ☐ Confirms which supported method to use to submit payments to impact.com (e.g., automated clearinghouse, credit card)

- ☐ Includes your advertiser account ID on all fund transfers

- ☐ Approves your monthly funding strategy (e.g., prefunding, statement of invoices)

- ☐ Schedules ample time each month to fund your impact.com account for publisher payments and software-as-a-service (SaaS) fees (e.g., a net 30 or net 60 payment cadence)

- ☐ Obtains all required vendor forms and information before launch

3. Legal setup

Without a doubt, the legal team maintains a busy schedule. So, communicate early with your legal team to ensure that all legal elements are in place well before your program launch date. Ensure your legal team:

- ☐ Creates relevant special terms for your publisher contracts (e.g., trademark bidding, promo code rules, etc.) before launch

- ☐ Reviews and accepts the service and master campaign agreements required to use the impact.com platform

4. Affiliate/partnerships manager setup

Once you log into the platform for the first time, you will find an onboarding checklist to help you set up your program. Try these tips to stay on track:

- ☐ Plan your commission strategy early and secure necessary internal approvals

- ☐ Coordinate with your product feeds team to upload your product catalog (as applicable)

- ☐ Work with marketing/design teams to secure and upload your ads and resources.

- ☐ Provide impact.com with a list of partners you want to migrate to identify those already on the platform (as applicable)

5. Post-launch partner migration (optional)

If you migrate from another platform, you'll likely choose to migrate your existing partners to impact.com once your program goes live. To ensure a successful migration:

- ☐ Identify a migration completion deadline (e.g., before your previous platform's shut off-date, before peak season)

- ☐ Implement a publisher migration communication strategy and incentivize your publishers to migrate

- ☐ Identify and address publishers' unique migration needs, such as new tracking implementations. Some publishers will require a migration fee to cover the development work necessary to change systems.

Onboarding success!

Align and prepare your teams to smooth out bumps along the road to onboarding and ensure accountability for onboarding milestones and goals. Why wait? Start your successful onboarding process today.

For more ideas on running a successful partnerships program, check out these impact.com resources:

- [Partner recruitment 101: Understanding your options to grow your partnerships program](#) (ebook)

- [Best practices for engaging partners](#) (ebook)

- [13 best practices for affiliate partnerships](#) (ebook)