

WEBINAR

Claude for Partner Managers

Practical ways to work faster on QBRs, partner content, and account intelligence

Use cases, live workflows, and ideas to steal



Partner Team specific:



Daily rhythm, without the manual roundup

1

Slack AI agent for updates

A Claude-powered Slack agent pulls together daily and weekly partner updates automatically — summarizing threads, flagging blockers, and posting a digest so nothing falls through the cracks between syncs.

Where it fits: daily standups, weekly team recaps

2

QBR prep

Feed Claude the quarter's notes, metrics, and past decks and get a first-draft QBR narrative — wins, risks, and next-quarter asks — in minutes instead of a half-day of assembling slides.

Where it fits: quarterly business reviews

Value props and content, drafted faster

3

Joint value propositions

Draft and iterate joint value propositions for a partner in the room — testing different audiences, tightening the pitch, and producing versions for sales, marketing, or exec sponsors from one conversation.

Where it fits: partner pitches, exec briefings

5

Content finder and creator

Surface existing partner content that already covers a need, or generate new one-pagers, blog drafts, and social copy on brand and on message — so reps aren't starting from a blank page each time.

Where it fits: co-marketing, partner enablement

Organized data, sharper targeting

4

Agency Partner Directory

A Notion database of agency partners that NotionAI helps keep current — enriching entries, tagging by specialty or region, and answering questions like "who covers retail in EMEA?" in plain language.

Where it fits: partner discovery, routing requests

7

Custom lists for partner development

Build targeted lists of prospective or underdeveloped partners against specific criteria — industry, size, region, capability gaps — to prioritize outreach and development effort.

Where it fits: pipeline building, territory planning

Agency Partner Directory

Table

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+ Filter

Aa Name ≡ Agency Type ≡ Company Description ≡ Country

📄 Scalewise	Lifecycle / CRM specialist	Automation, omnichannel mar	Denmark
📄 Bad Rep Agency	Lifecycle / CRM specialist	Why "Bad Rep": we spy on err	Spain
📄 SOLVM e-mailmarketing experts	Email and e-commerce a...	SOLVM, the email marketing e	Netherlands
📄 Bravescale	Email and e-commerce a...	Bravescale is a performance- c	Greece
📄 Subjectlime	Email and e-commerce a...	Subjectlime was born and rev	Spain
☐ 📄 BBB Marketing	☐ OPEN Email and e-commerce a...	BBB Marketing is a Klaviyo-fir	Bulgaria
📄 DeOnlineStrateeg.nl	Lifecycle / CRM specialist	E-mailmarketing en marketing	Netherland
📄 Ride On	Email and e-commerce a...	Ride On è la prima digital ager	Italy
📄 Cantaloupe Digital	Email and e-commerce a...	At Cantaloupe Digital, we spec	Italy
📄 YOCTO	Email and e-commerce a...	ABOUT YOCTO: YOCTO is the	Cyprus
📄 Stellar Projects	Email and e-commerce a...	Nous avons la culture de Marc	France



How can I help you today?

Agency Partner Directory

Find partners best suited for beauty B2C brands in Sweden with experience in Klaviyo. Show top 5 with **score**, **agency type**, **example clients**, and **why they fit**.

+ ⚙

Auto ⬆

Prompt A — shortlist by region + platform

"Recommend 10 partners for [country/region] who work with [platforms]. Prioritize **Partner Fit Score ≥ 8** and include 1–2 sentences of rationale using the 'Partner Fit Evidence' and 'Partner Fit Rationale' fields."

Prompt B — partners for a specific client type

"Find partners best suited for [industry] B2C brands in [region] with experience in [platform]. Show top 5 with **score, agency type, example clients, and why they fit.**"

Prompt C — avoid conflicts

"Recommend partners that **do not sell their own AI decisioning product** and focus on services/implementation. Provide top 8."

ICP fit review

6

Score partner fit against your ICP — fast

Give Claude your ideal-customer-profile criteria and a partner's profile, site, or deck, and get a structured fit review back — strengths, gaps, and a recommendation — instead of manually checking each box.

- Consistent scoring criteria across the whole team
- Cuts early-stage qualification from hours to minutes
- Flags follow-up questions for the next call

Before → After

Manual checklist

~45 min / partner

Claude-assisted review

~10 min / partner

Extending the same pattern

7

Contract & terms review

Summarize partner agreements, flag non-standard terms, and prep redline talking points before legal review.

8

Co-marketing campaign briefs

Turn a rough campaign idea into a structured brief — audience, message, assets needed, timeline — ready for partner sign-off.

9

Competitive battlecards

Keep partner-facing battlecards current as the competitive landscape shifts, tailored per partner segment.

10

Partner health & renewal risk

Turn scattered CRM notes and usage data into a plain-language health read and a risk flag ahead of renewal.

11

Meeting notes to action items

Turn call transcripts or notes into a clean recap with owners and dates, posted straight to Slack or email.

12

RFP / RFI response drafts

Draft first-pass responses to partner RFPs from your existing content library, then refine instead of starting cold.

Three ways to set this up this week

01

Start with one recurring task

Pick the update, list, or review you redo most often and turn that one into a repeatable Claude workflow first.

02

Give Claude your real inputs

Point it at your actual QBR template, partner criteria, or Notion database rather than describing them from memory.

03

Connect where the work happens

Use connectors for Slack, Notion, or Google Workspace so drafts and digests land where your team already looks.