

B2B SaaS Affiliate Program *Audit* Checklist

A 15-minute diagnostic for finding the part of your affiliate program worth fixing before you recruit more partners.

This is a priority tool, not an industry benchmark.

Score each answer Yes = 0, Not sure = 1, or No = 2. Then compare the four sections against each other. Your highest section score is the first place to investigate.

How to use it

- 01 Answer from evidence where you can. If you genuinely do not know, mark Not sure. Uncertainty is useful data.
- 02 Score every section separately. Do not combine everything into one vanity health score.
- 03 Start with the highest-scoring area. Fix the system creating the friction before adding more volume.
- 04 Use the result pages at the end. Your score points to the most relevant article, product, or service path.

The four areas

01 PARTNER FIT

Are the right people in the program?

02 ACTIVATION & ENGAGEMENT

Do approved partners actually move?

03 PROGRAM INFRASTRUCTURE

Can capable partners promote without friction?

04 ECONOMICS & ATTRIBUTION

Do incentives and tracking make sense?

01 Partner Fit

Are the right people in the program, with a credible path to your buyer?

- | | | | |
|---|---------------------------------|--------------------------------------|--------------------------------|
| 01 Ideal partner: Can you describe the audience, channel, and reason someone belongs in this program in one sentence? | ☐
YES | ☐
NOT SURE | ☐
NO |
| 02 Approval filter: Do you vet applicants for audience fit and promotional method instead of approving by default? | ☐
YES | ☐
NOT SURE | ☐
NO |
| 03 Access to your ICP: Can you identify which current partners have credible access to the buyers you actually want? | ☐
YES | ☐
NOT SURE | ☐
NO |
| 04 Promotion path: Do you know how your active partners reach buyers: content, clients, email, community, search, or another channel? | ☐
YES | ☐
NOT SURE | ☐
NO |
| 05 Dormant inventory: Have you reviewed inactive and low-fit partners before deciding the program needs more recruitment? | ☐
YES | ☐
NOT SURE | ☐
NO |
| 06 Concentration risk: Is meaningful activity or revenue spread beyond one or two partners? | ☐
YES | ☐
NOT SURE | ☐
NO |

SCORE	YES = 0	NOT SURE = 1	NO = 2	SECTION TOTAL ____ / 12
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02 Activation & Engagement

Do approved partners move from registration to a meaningful first action?

- | | | | |
|--|---------------------------------|--------------------------------------|--------------------------------|
| 01 First action: Does every approved partner know exactly what to do first, beyond receiving a login and tracking link? | ☐
YES | ☐
NOT SURE | ☐
NO |
| 02 Time to action: Can you see how long it takes a new partner to reach their first meaningful promotion, referral, or agreed outcome? | ☐
YES | ☐
NOT SURE | ☐
NO |
| 03 Dormancy type: Do you distinguish never-activated partners from partners who were active and later went quiet? | ☐
YES | ☐
NOT SURE | ☐
NO |
| 04 Reason to move: Do partners have a concrete reason to act rather than simply knowing the program exists? | ☐
YES | ☐
NOT SURE | ☐
NO |
| 05 Useful communication: Is outreach driven by real opportunities or partner behavior instead of calendar filler? | ☐
YES | ☐
NOT SURE | ☐
NO |
| 06 Diagnosis: When partners stall, can you explain why from data or direct feedback instead of guessing? | ☐
YES | ☐
NOT SURE | ☐
NO |

SCORE	YES = 0	NOT SURE = 1	NO = 2	SECTION TOTAL ____ / 12
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03

Program Infrastructure

Can a capable partner promote without unnecessary operational friction?

01 Tracking: Has the full journey been tested from partner action through to the outcome you actually pay on?

☐ YES

☐ NOT SURE

☐ NO

02 Findability: Can partners find links, terms, core assets, and support without asking where everything lives?

☐ YES

☐ NOT SURE

☐ NO

03 Enablement: Do resources explain what to say, who the product is for, and why a buyer chooses it, not just provide banners?

☐ YES

☐ NOT SURE

☐ NO

04 Ownership: Is there a clear owner for applications, support, performance follow-up, disputes, and fraud review?

☐ YES

☐ NOT SURE

☐ NO

05 Reporting: Can you separate registrations, active partners, outcomes, revenue, and concentration instead of collapsing everything into one number?

☐ YES

☐ NOT SURE

☐ NO

06 B2B handoff: Does attribution survive the handoff between affiliate tracking, CRM, sales, and finance?

☐ YES

☐ NOT SURE

☐ NO

SCORE

YES = 0

NOT SURE = 1

NO = 2

SECTION TOTAL ____ / 12

04

Economics & Attribution

Do the incentives match the effort, buying cycle, and behavior you actually want?

01 Payout clarity: Can a partner quickly understand what earns commission, how much they earn, and when they get paid?

☐ YES

☐ NOT SURE

☐ NO

02 Economic fit: Does the payout make sense for the effort required, sales cycle, conversion likelihood, and customer value?

☐ YES

☐ NOT SURE

☐ NO

03 Incentive design: Do bonuses or tiers reward the behavior you actually want rather than just increasing headline commission?

☐ YES

☐ NOT SURE

☐ NO

04 Attribution rules: Are attribution rules and common exceptions clear enough to prevent avoidable disputes?

☐ YES

☐ NOT SURE

☐ NO

05 Reconciliation: Can finance connect commissions back to valid customers, leads, or revenue without a recurring manual mystery?

☐ YES

☐ NOT SURE

☐ NO

06 Influence context: Can you evaluate partner value with more context than last-click revenue alone when the buying journey is multi-touch?

☐ YES

☐ NOT SURE

☐ NO

SCORE

YES = 0

NOT SURE = 1

NO = 2

SECTION TOTAL ____ / 12

YOUR AUDIT RESULT

Start where the friction is highest.

Add each section separately. The highest score is your first investigation priority. If two sections tie, start with the one containing more No answers rather than more Not sure answers.

AREA	SCORE	PRIORITY
Partner Fit	____ / 12	____
Activation & Engagement	____ / 12	____
Program Infrastructure	____ / 12	____
Economics & Attribution	____ / 12	____

Read next based on your highest score

PARTNER FIT

How to Recruit B2B SaaS Affiliates Without Collecting 400 Coupon Sites

Use this if the problem starts with who gets recruited, approved, or allowed into the program.

ACTIVATION & ENGAGEMENT

Why Affiliates Sign Up and Never Promote (And What to Do About It)

Use this if good partners are joining but not reaching meaningful activity.

PROGRAM INFRASTRUCTURE

Your Affiliate Program Isn't Built to Sell

Use this if partners lack usable positioning, resources, tracking confidence, or a clear path to promotion.

ECONOMICS & ATTRIBUTION

Affiliate Program Management for B2B SaaS: The Complete Operator's Guide

Use this if commission logic, attribution, reporting, or the operating model itself is unclear.

WHAT TO DO NEXT

Your audit tells you what to fix *next*.

Use the pattern in your scores to choose the smallest useful next step. Learn it yourself, use a shortcut where one exists, or send me the audit and we can start from there.

DO IT YOURSELF

One section clearly stands out

Start with the article on page 4 and work through that one system first. You probably do not need to rebuild the whole program. Make one change, decide what evidence would show improvement, and review it after enough real partner activity has occurred.

IMPLEMENTATION SHORTCUT

Activation is the bottleneck

If the problem is specifically what to send new, inactive, or stalled partners, The Affiliate Activation Sequence gives you the 12-email onboarding and behavior-triggered framework so you can build the flow around your own program without starting from a blank page.

[See the Activation Sequence →](#)

GET HELP

Several sections are messy at once

If two or more areas are competing for the top score, send me this completed PDF. It gives us a much better starting point than a vague “tell me about your program” call. I can see where you are already feeling friction, and we can work out what actually needs fixing first.

[Send me your completed audit →](#)

Attach this completed PDF when the email opens.

The goal is not to fix everything. It is to fix the right thing first.