



# White Label Partnership Readiness Checklist

How ready are you for a white label partnership? Timing is everything when it comes to building a new relationship so you can focus on scaling. Walk through our checklist below and find out!

Yes	No	Defined Need
		Have you clearly defined the need that is driving your agency interest in white labeling?
		Is building a white label partnership an appropriate strategy to address your agency's need?
Yes	No	Readiness for Change
		Is now the right time for a partnership (e.g., it will not compete with other major changes currently being made within your agency)?
		Will your agency's leaders support change and effort required to implement and sustain a partnership? It is essential that the leaders within your organization actively support and champion your partnership.
Yes	No	Time, Resources, Personnel
		Will your agency provide sufficient support for the partnership needs to flourish and thrive cohesively with your mission?
		Will your agency require new deliverables or provide training for current deliverables you require to be fulfilled from your new team?
Yes	No	Sustainment for Change
		Will your agency be willing to be flexible to allow a partner to continuously improve processes to support your clients (e.g new tools, deliverables, etc)?
		Will your agency be able to remain collaborative as new needs arise from each client for the benefit of retention and customer service?

**Number of Yes responses you have selected is 6-8 out of 8:**

This is likely a good time within for your agency to use white label services as a way to scale your agency. As you begin the implementation process, continue to monitor whether the answers to these questions change and keep a close eye on any items to which you answered "no".

**Number of Yes responses you have selected is 4-5 out of 8:**

Your organization may not be ready on one-third to one-half of the factors. This reduces the likelihood of partnership success. Evaluate if this is an appropriate time to participate in a new partnership or if you're just in need of additional resources to turn those no answers into yes.

**Number of Yes responses you have selected is 1-3 out of 8:**

Based on your responses, significant work is likely needed before your agency is ready for a partnership. Trying to engage in a partnership right now could create significant risk that it will not succeed or produce a fruitful partnership.