

ISV Partner Intake & Alignment Form

Date

ISV Company Name

1. Partner & Product Overview

Product Name(s)

Primary Contacts

Provide the primary point of contact for each relevant function.

Role / Department	Name	Phone	Email

Mission Statement

What Gap Are You Trying to Fix?

Ideal Customer Profile

Qualifying Questions & Answers

List the key qualifying questions your team uses, the ideal answer, and the benefit it reveals.

Question	Ideal Answer	Benefit It Reveals

2. Go-To-Market Alignment

FAB Framework (Features, Advantages, Benefits)

Capture up to three Feature / Advantage / Benefit combinations.

FAB 1

Feature 1	
Advantage 1	
Benefit 1	

FAB 2

Feature 2	
Advantage 2	
Benefit 2	

FAB 3

Feature 3	
Advantage 3	
Benefit 3	

Main Pain Points the Product Solves	
Key Differentiators	
Primary Competitors	
What Makes Competitors Stand Out	
What Makes This Product Stand Out	

Win / Success Stories

Success Story 1

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Success Story 2

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Objections & Typical Responses

List common objections your sales team hears, along with the typical response.

Objection	Typical Response

Key Value Propositions

Key Value Proposition 1	
Key Value Proposition 2	
Key Value Proposition 3	

Brand Guidelines

Logo Usage / Description	
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Attach logo files separately, or describe usage requirements above.

Brand Colors	
Brand Fonts	

Co-Marketing Opportunities

Webinars	
Case Studies	
Joint Events	

3. Sales Cycle & Opportunity Flow

ISV Sales Cycle Overview

Typical Sales Cycle Length

Discovery Stage

Key Gates to Pass

Key Information to Gather

Demo Stage

Key Gates

Key Value-Adds

Key Information to Collect

Quote / Proposal Stage

Contracting Stage

Integration Stage

WAS → ISV Opportunity Handoff

When WAS Hands Off the Opportunity

Required Information at Handoff

E.g., customer profile, use case, budget/timeline, technical requirements.

Ownership of Stages

Indicate whether each stage is WAS-owned, ISV-owned, or jointly owned.

Stage	WAS-Owned	ISV-Owned	Joint
Discovery	☐	☐	☐
Demo	☐	☐	☐
Quote / Proposal	☐	☐	☐
Contracting	☐	☐	☐
Integration	☐	☐	☐

Service Level Agreement

ISV Response Time to New Opportunities

4. Integration Requirements & Technical Alignment

Integration Overview

Integration Type

E.g., API, Webhook, SSO, Data Sync, Embedded UI.

Integration Timeline

Duration

Dependencies

Milestones

Milestone Target Dates

API Documentation

Sandbox Access Required?

☐

Yes

☐

No

If yes, provide contact information for the individual who needs access.

Name	Email	Phone	Role

Authentication Requirements

Data Schemas

Security Requirements

Ownership

WAS Responsibilities

ISV Responsibilities

Merchant Responsibilities

Shared Responsibilities

Testing & Validation

UAT Requirements

Success Criteria

Go-Live Checklist

Renewal / Retention Goals

5. Additional Notes & Open Questions

Risks or Concerns	
Dependencies	
Next Steps	

6. Payment Layer Alignment

How Payments Flow Within the Software

Where Does the Payment Originate?	
What Data Is Passed?	
What Data Is Required?	
Settlement / Reconciliation Trigger Events	

Payment Features Supported

Select all payment features supported by the product.

☐ Card Present	☐ Stored Credentials	☐ Tips
☐ Card Not Present	☐ Recurring Billing	☐ Partial Approvals
☐ Tokenization	☐ Surcharging	☐ Offline Mode

Where WAS Fits Into the Architecture

Select all that apply.

☐ SDK	☐ Gateway
☐ API	☐ Middleware

7. Merchant Experience Requirements

What the Merchant Sees

Attach supporting files separately, or describe each item below.

UI Screenshots (Description)	
Payment Flow Diagrams (Description)	
Checkout Experience (Description)	
Reporting Screens (Description)	

What the Merchant Must Do

Select all that apply.

☐ Provide Data	☐ Configure Settings
☐ Install Hardware	☐ Complete Training