Partnership Outreach Tracker

A working checklist for finding, approaching, and managing Web3 partnerships (collaborations in crypto and blockchain). Check off the work as you go, then log every live conversation in the tracker on page 2.

01 Identify

- ☐ Write down the partnership you actually need this quarter: distribution, liquidity (access to buyers and sellers), technology, shared marketing, or a room you cannot enter alone.
- ☐ List 15–25 companies whose audience overlaps yours but whose product does not compete.
- ☐ For each name, write down a real person — their role plus a handle or an email you already have. Do not guess addresses.
- ☐ Note the fit in one sentence: what you give, and what you want.
- ☐ Mark any warm path: a shared contact, a conference conversation, or a prior message thread.
- ☐ Rank the list by fit and access, not by brand size alone.
- ☐ Drop anyone you cannot explain a fair exchange for.

02 Approach

- ☐ Draft a one-sentence offer before you write the message.
- ☐ Prefer a warm introduction (one made by someone you both know). If you ask someone to introduce you, give them a short three- or four-line note they can forward as-is.
- ☐ Keep the first note short: who you are, why them specifically, the ask, and one next step.
- ☐ Send a one-page note or a short deck, not a long document.
- ☐ When you hit send, put a date on the first follow-up. Three business days is a solid default.
- ☐ Follow up once or twice. If there is still no reply, close the loop politely and move on.
- ☐ Log the outreach the same day, even if the answer was no.

03 Manage

- ☐ Use the same stages for every partner so you can scan the list in a minute.
- ☐ Give every live conversation an owner on your team and a next step with a date.
- ☐ Review the tracker weekly. Anything with a skipped date gets a decision: move it, follow up, or close it.
- ☐ When a partnership goes live, write how you will measure success, and a check-in or renewal date.
- ☐ Keep notes short and factual: what was promised, by whom, and when.
- ☐ Do not leave a “maybe” on the list for more than one review cycle without a next step.

Stage key. Use only these labels in the tracker, so the sheet is easy to scan:

Research · Intro requested · First conversation · Proposal · In negotiation · Live · Paused · Passed

Weekly review

- ☐ Which rows have a skipped date?
- ☐ Which conversations need a decision this week — move, follow up, or close?
- ☐ Which live partners have a check-in or renewal coming?
- ☐ Is every open row assigned to a named owner?

First note skeleton

Hi [name] — [how you know them, or who introduced you]. I’m reaching out because [the specific fit in one sentence]. The ask is [one clear ask]. Would [a specific next step] work for you?

Adapt this. Keep it short, make the fit specific, and end on one next step, not a menu of options.

Partnership tracker

One row per partner. Update the stage and the next step on the same day as the last conversation. Use the date column for the next action, not the last one.

PARTNER	TYPE	CONTACT	STAGE	NEXT STEP	DATE

Types you might use: exchange, launchpad, protocol (a shared set of rules), infrastructure, media, community, agency, or shared-marketing partner. Contact should be a named person, not only the company.