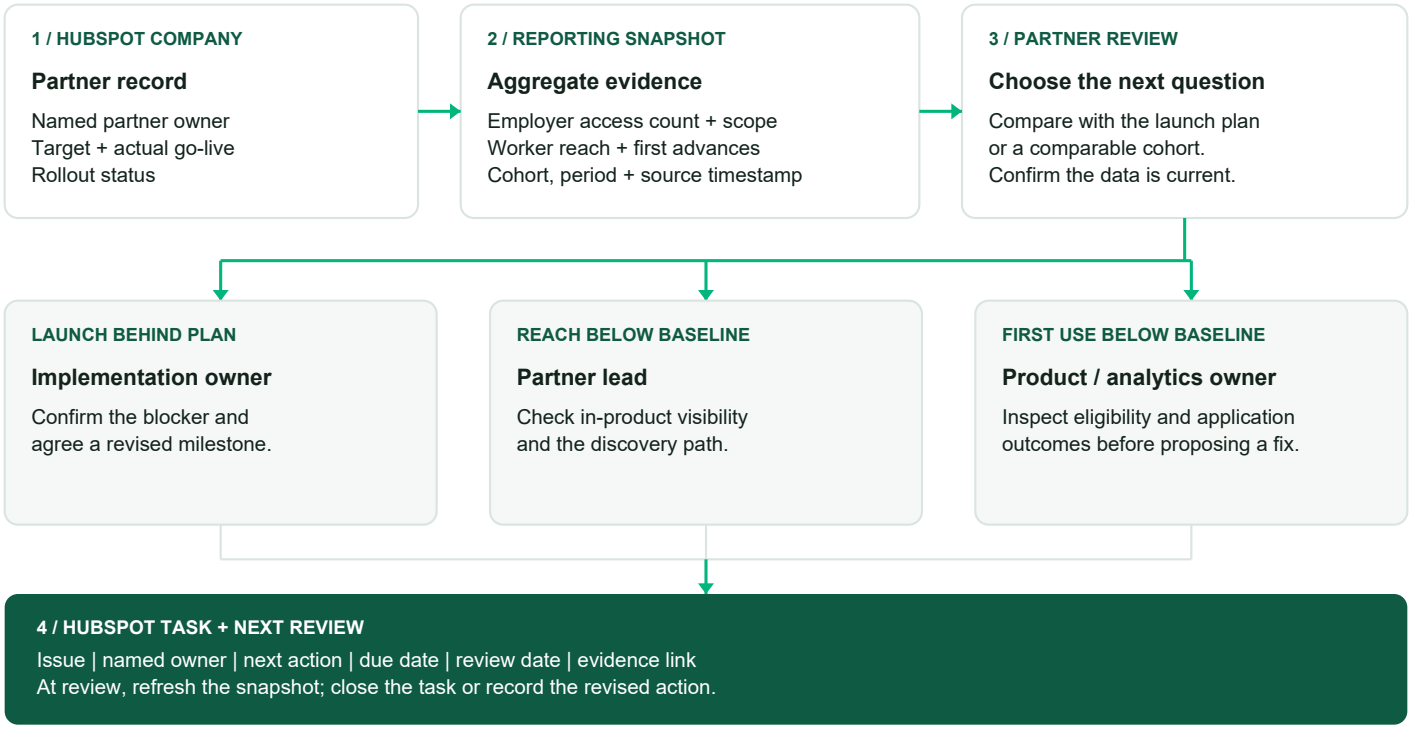
Partner adoption playbook

A HubSpot operating view for embedded On-Demand Pay

Native embedded On-Demand Pay has three distinct checkpoints: platform launch, benefit availability and worker use. Where no employer activation is required, availability is a coverage check. A partner review should show which rollout needs attention, why, and who owns the next action.

TURN A PARTNER SIGNAL INTO AN OWNED NEXT STEP

Illustrative HubSpot flow. Roles and review baselines are agreed with the team.



Missing or stale snapshot? Reconcile the data first. Keep individual worker identity and financial activity in the originating systems; use approved aggregates or a source link in HubSpot.

THREE SIGNALS FOR THE PARTNER REVIEW

01	**Launch progress**	Actual or expected go-live versus the agreed launch date
02	**Worker reach**	Unique workers shown the option / workers with platform access where the benefit is available
03	**First advances**	Unique exposed workers taking a first advance / unique exposed workers

Match the partner, cohort and observation window. Check eligibility alongside first use; a low rate alone does not establish the cause.

WHERE SPECSAVI FITS

SpecSavi configures the partner milestones, ownership rules, tasks and reporting in HubSpot around this review process. Start with one live partner, agreed definitions and one review cycle. Add automation where data access and the HubSpot edition support it.

References: Clair embedded model; HubSpot tasks; SpecSavi CRM services. Illustrative design, not an assessment of current systems.