Channel Management Metrics
That Truly Matter

Table of Contents

A Letter from the CEO
The Leader in Unified Channel Management

Dear Channel Professional:

Thank you for downloading this eBook – Channel Management Metrics That Truly Matter. ZINFI has had the privilege to work for major Fortune 1000 companies worldwide to drive their channel programs globally. Over the past decade, we have learned what works and what doesn't. This booklet is a summary of some of the core metrics best practices that great companies leverage to build high performing channels.

There is no doubt that channel management is complex. However, it's made more complex when it is managed through a set of tools and systems that are disjointed. In many organizations, channel management systems consist of an array of diverse systems that have evolved over a long period of time. As a result, it is difficult for most companies to figure out what is really going on, and performance management via metrics become a real challenge. However, those organizations who have implemented a unified approach to their channel management can develop a much deeper understanding.

To build a high performing channel, it is essential to optimize channel management end-to-end, and track a core set of channel marketing and sales metrics. ZINFI's vision is to enable our customers to optimize their channel end-to-end via our Unified Channel Management (UCM) platform, and bring in complete visibility of channel performance. A Unified Channel Management (UCM) platform comprises of three core sets of processes:

1. **Partner Relationship Management (PRM):** Ensure the interaction between the organization and its partners is fully optimized and true channel potential is achieved by aligning training, programs and incentives.
2. **Partner Marketing Management (PMM):** Enable a partner to generate qualified leads in business-to-business and business-to-consumer segments by leveraging a set of pre-designed, ready-to-go assets, campaigns and programs.
3. **Partner Sales Management (PSM):** Enabling channel sales organization, as well as partners, with a set of necessary sales tools, methodologies and process steps to maximize closing at a substantially lower cost.

Development, roll-out and optimization of these three core sub-processes (PRM, PMM and PSM) result in world-class Unified Channel Management. When achieved, organizations not only generate more revenue at a lower cost, but also build a sustainable global advantage.

This booklet is divided into four sections, Section II covers the core elements of Unified Channel Management, and Section III focuses on Channel Marketing & Sales Metrics that an organization can use to track leveraging a unified approach to channel management.

We encourage you go through these articles and we hope you will walk away with pragmatic ideas that you can start implementing today to start building a high performing channel.

Enjoy!

Sugata Sanyal
Founder and CEO

① Redefining Channel Management Through A Unified Lens

Channel management is always challenging. It is even more complex for companies that are selling globally, because there is tremendous variability in requirements and parameters from region to region. We also know that global market requirements can have a tremendous impact on channel policies and programs, and on how a company goes to market. In this article we will explore how a unified approach to channel management can greatly improve channel performance.

Before we delve into the solutions, however, let's talk a bit about the sources of complexity in channel management, particularly on in the global context. First, a channel management infrastructure needs to account for different types of partners—whether they are alliance partners, go-to-market partners, solutions and services partners, or training partners—and how they form different parts of the ecosystem. Channel management needs to address the unique requirements of these different partner types. It also needs to take into variations in market and industry requirements, which depends in part on whether the vendor operates in a business-to-business (B2B) or a business-to-consumer (B2C) environment.

We also know that markets vary considerably by country. For example, banking, finance and insurance are industries that are highly variable by geography, depending on the maturity of the country as well as local laws. Similar dynamics are at play in healthcare, education, government and other verticals in the B2B space. When a vendor is selling to consumers, channel management tends to be a bit more horizontal across countries and regions. However, there are big differences between developed countries and developing countries in terms of how B2C channels are managed.

Finally, the constant changes and evolution in products, services and solutions introduce still more complexities for channel management. For example, when a specific product like shampoo is rolled out globally, requiring significant localization of marketing and messaging, the approach is going to differ substantially from the approach required for high-tech products like manufacturing devices or network components or software, which are sold to businesses and marketed in a way that typically requires less localization. Differences like these have an impact on the level of information that needs to flow through the channel and the complexity of managing the channel as you pursue channel marketing

goals and initiatives.

So, I hope you can begin to see that one of the most important steps in establishing a unified approach to channel management is to take a broad, longer-term view. "Rome was not built in a day" may be a cliché, but it expresses a particularly apt principle for channel management. To be truly successful in channel management, you need to have an overarching business strategy in place. One of the first things a company needs to decide is whether they are going to market directly to end users or via the channel. Most companies that sell consumer products market, by default, through some sort of distributor network. But even then they need to decide whether they are going to sell through franchises (e.g., Burger King or McDonald's) or sell directly through captive outlets (e.g., Starbucks). The same kinds of considerations apply when selling complex solutions through the channel, especially in the technology segment. The direct vs. channel discussion needs to be clear and upfront from the beginning, and then the strategy needs to be communicated repeatedly to the channel partners. Otherwise, they may feel their business is being undercut by the company. This is why, for example, high-value products like the Apple products are generally sold directly to consumers through Apple retail stores. When they are sold through channel partners the products are rarely discounted to eliminate any pricing conflict or share-shifting.

The same kinds of discussions take place in other industries. Companies have to decide whether to sell via open channels or closed channels. Whether the industry is insurance or real estate or banking or high-tech products, at some point specialty capabilities may be required on the reseller side, such as initial certification or additional investments on the partner side, and in cases like these partners may require assurances from the vendor that they won't make the products or services available to everybody and ensure there's enough business available to a specific channel partner so they can break even on their investment costs. That's why the open channel vs. closed channel discussion must be thought through and discussed in a very clear way.

Once a company has established a high-level channel policy and a distribution strategy, the next step is to think about the people structure, because at the end of the day companies do not do business with companies; people do. That's one reason it's so important to set up the right channel infrastructure—to make sure that high-volume partners who play a very important role have high touch, but at the same time ensure that partners who do not sell a lot do not feel left out. This is where organizing your channel management infrastructure is critical to make sure all partners not only feel valued and important but also get the level of support that's appropriate to their profile. From the company side, you need to ensure the channel management infrastructure is not cost-prohibitive but can actually drive growth and scalability. A third important consideration in establishing a unified approach to channel management is process. When a partner is onboarded and has access to contracts, training modules, incentives, etc.—all those processes need to be clearly defined in advance, and they

should be different for partners who have been doing business with the company for a long time. Processes related to deal registration and protection are incredibly important in the case of high-value deals where partners need to be sure there is no over-distribution of solutions to the channel and so they don't end up fighting among themselves over price and losing collectively against other competitor solutions and products. Also, from an overall process perspective, both marketing and sales teams need to make sure that partners can differentiate from each other—a requirement that, by the way, extends to the solution structure itself. Often, vendors put programs together which are mass-distributed and don't provide specific partners or partner types with the opportunity to rise to the top, and that can result in some partners disengaging and guarantee the failure of certain channel initiatives.

These leads to my fourth consideration in establishing a unified channel management approach: programs. Companies can drive channel performance based on several factors. First of all, programs that are rolled out need to be closely aligned with partner competency. A partner that has just signed up with company may not be eligible to sell certain kinds of products and services, whether B2B or B2C. There also needs to be close alignment with the partner business model. Pushing incentives programs that aren't aligned with a partner's sales and marketing focus may completely waste channel management resources behind programs that don't yield any results. The company's rewards structure needs to be carefully thought through. Rewarding a specific high-volume partner through back-end rebates or additional support mecha-

> " A channel management infrastructure needs to account for different types of partners—whether they are alliance partners, go-to-market partners, solutions and services partners, or training partners—and how they form different parts of the ecosystem "

nisms should be a very different process from setting up programs that drive individual sales rewards where each sales person can be motivated with specific incentives and rewards that will drive transactions. This latter approach tends to work well on transactional products where a salesperson does not need to rely on multiple functions to pull solutions together. However, if a program is rolled out and tied to an individual reward, but the salesperson is heavily dependent on the vendor's marketing or technical or support infrastructure, that company or program can fail completely just because it wasn't thought through properly.

A final consideration in putting together a unified channel management approach is technology, which is obviously extremely important. In fact, at ZINFI we have coined the term "unified channel management" in part to highlight three interrelated core elements of our channel management technology: 1) partner relationship management, 2) channel marketing management and 3) channel sales management. With partner relationship management, the primary focus is on how the vendor interacts with and manages the partner—signing agreements with the partner, getting them trained, providing incentives, managing performance based on several specific criteria, all at a holistic level. Channel marketing management, on the other hand, is about enabling partners to go drive demand on their own leveraging marketing assets, sales programs, product initiatives and the like. Partner sales management applies mostly to enterprise-level sales, where people are actually trained through a multi-month, complex sales cycle using a step-by-step approach designed to ensure participants aren't overwhelmed by superfluous sales and marketing tools. From a technology platform perspective, it is incredibly important—whether we are thinking about partner relationship management, channel marketing management or partner sales management—to make sure all of these elements, individually or collectively, come with a set of business analytics tools for channel management. These tools allow the channel management team to slice and dice the data in various ways to gain insights into what is really going on, to understand what's working and what isn't, and to be able to actions based on that information.

If we step back and look at all of the things we need to consider and think through in order for channel management to excel, we might be justified in wondering how the channel actually works today. Well, the truth of the matter is that for many organizations it doesn't work nearly as well as it should. However, where there is proper alignment of channel policies, people, process, programs and platform, it is certainly possible to look at channel management through a unified lens of high performance, and drive growth at a lower cost in a global context.

❷ How to Make Unified Channel Management a Reality

As we discussed earlier channel management is truly complex. However, it's made more complex when it is managed through a set of tools and systems that can easily be compared to a patched-up quilt. In many organizations, channel management systems consist of a hodgepodge of diverse systems that have evolved over a long period of time. Because of that, most companies today that try to implement a unified approach to their channel management struggle to make it work and get a decent return on their investment.

The primary reason underlying this problem is a lack of available end-to-end systems that can readily adapt to each organization's unique needs. Every company is different. So, for example, a horizontal product like a customer relationship management (CRM) system cannot really address the requirements for unified channel management. Therefore, while marketing automation systems have evolved quite a bit over the last few years, and CRM systems have also progressed—no company has completely addressed the need for unified channel management.

So, how are organizations managing the channel today?

- **Partner portal:** Most companies that are selling through the channel today have a partner portal. They build this partner portal over a period of years with various sets of tools, but there are no consistent standards that address how a portal should be built, and requirements also vary considerably across different types of channels. For example, if you're looking at a dealer network where the relationship is highly transactional, the partner portal will look very different from a portal in, say, the tech industry, where a solutions provider is working very closely with one or more technology providers to bring in complex, integrated solutions to the market. Similarly, a partner portal in the retail and franchise segment of the marketplace will be unique to those kinds of businesses. Because of this diversity in needs across segments, no vendor has been able to address the requirements for all segments.
- **Partner records:** If we look at how most companies are selling through the channel, and how they manage their partner records or their channel records, we find that most of them are using a CRM or some sort of home-grown database. In fact, based on a survey we conducted, more than 40% of companies end up managing their partner list on an Excel

spreadsheet. That's kind of scary, but that's where the market is today.

- **Partner onboarding:** When it comes to building and growing a channel, partner onboarding is a critical first step. Yet most companies today try to manage partner onboarding with some sort of combination of CRM and Microsoft Office tools like Excel, and some even resort to keeping track through paper records.

- **Partner programs:** To manage partner programs, some companies have started to use marketing automation tools like Oracle Eloqua or Marketo for direct marketing. However, those tools are way too complex for most organizations and they are not flexible enough to be deployed in a multi-tier channel where corporate can load campaigns and content, and then distribute those materials to their partners and execute marketing initiatives in variety of shapes and forms.

- **Partner training** is another area where very few companies have structured systems in place. But what's the point of recruiting partners if you don't have a structured way of getting them trained and increasing their competencies? Many large enterprises today have some sort of learning management system (LMS), but when you take a step down to companies below the $500 million level, or to companies that sell to other segments, they typically have serious issues managing partner training.

- **Partner incentives management:** Partner incentives man-

agement is also a very important area of concern. This is yet another area where it's quite commonplace to deploy a patchwork of multitude systems for managing market development funds, rewards, rebates, etc.

So, as we consider the challenge of unified channel management, we see that although companies may have the best of intentions in their efforts to pull together the right programs, the deployment and execution of those programs can be an absolute nightmare because there are no end-to-end systems that exist today to make it happen. However, companies like ZINFI and a few others are now working very hard to innovate with the goal of providing a complete, end-to-end, unified channel management infrastructure that can be not only modular but also comprehensive if all the modules are turned on and used in the right order.

If we step back and look at the problem from a systems perspective at a macro level and consider the core requirements of unified channel management, we can break it down into five parts, what I call the five Ps:

1. **Profiles (partner profile management):** Partner profiles represent the most important first step in understanding existing partners' capability to sell into various segments of the market. Establishing the partner profile is also a precursor to expanding and growing the channel based on an under-

standing of what type of DNA an organization should be looking for when they are trying to recruit new partners. Without a sophisticated database system, it's almost impossible to analyze and manage a diverse set of partner profiles to drive productivity.

2. **Policies:** Channel policies determine who will sell to what and how. Here's what I mean: If a channel program has various types of partners, the competencies and reach of those partners, as well as the relationships they bring in, determine whether or not they are actually able to sell. If those policies are not absolutely clear, unified channel management becomes really hard because organizations won't know what exactly to implement.

3. **Programs:** When we talk about programs, we're referring not just to campaigns like partner recruitment and partner training, but also the ability to put together market-segment-oriented solutions, training, incentives and so on to provide a truly unified channel management framework that allows an organization to recruit, engage, enable and manage their partner base to achieve a desired level of growth. Programs are critical, but they need to be analyzed from an ROI perspective. A unified channel management system should provide the tools that an organization needs to quickly perform such an analysis.

4. **People:** This is one of the most important Ps. The structure of a channel organization—how the field organization is structured, how territories are mapped, how the relationships between the regions and the worldwide organization work—all of these factors contribute to the broader framework required for people management to drive performance. However, without the right structure and the right unified channel management system mapped into that structure, it's almost impossible to move fast enough and see through a dashboard what is going on in real time.

5. **Platform:** This is where tools and systems come in. Earlier I talked about why platforms are important. However, before a company can deploy a truly unified channel management system at a global level, it must think through the first four Ps mentioned above. How are we going to manage our partner profiling and profiles? What actions are we going to take based on that understanding? Are there policies in place that need to be aligned or streamlined? And can we streamline policies without a channel management system in place? What programs makes sense, and what data do we have to analyze programs and dynamically respond based on ROI analysis? How can we align the people to look for the most efficient structure? Once these questions have been answered, we're in a much better position to consider how to implement a system on a step-by-step basis so the organization is not overwhelmed but is able to systematically increase its maturity level through transparency and performance management globally.

Based on the points I've made above, you can see that unified channel management is indeed complex. However, with a thoughtful approach that focuses on the five Ps I've outlined here, an organization can create a maturity map through which they can substantially improve the performance of their channel organization by taking a unified approach to channel management and also deploy systems that will make unified channel management a reality.

> *In many organizations, channel management systems actually consist of a hodgepodge of diverse systems that have evolved over a long period of time. As a result, most companies that try to implement a unified approach to their channel management struggle to make it work and get a decent return on their investment*

3 10 Channel Marketing Metrics That Truly Matter

With the rise of content marketing as a primary way to engage the target audience and drive sales, channel marketing is also evolving rapidly. A decade or two ago, channel marketing pretty much meant running events (for recruitment, training and lead generation) and giving away market-development funds to those who knew how to leverage them. Today, unified channel management is changing the way companies invest, track and improve ROI from their channel marketing activities. A core set of channel marketing metrics play a critical role in driving better ROI.

Before we take a deep dive into the channel marketing metrics that truly matter, let's step back and clearly define the objectives of channel marketing. If marketing is about driving awareness, engagement and customer intimacy, channel marketing essentially means the same thing, but it operates in more dimensions: The first two dimensions are the channel partners who resell the products and services, and the end users who procure them. To that you add a third dimension: increasing reach at a lower cost. Channel marketing metrics need to address all three core dimen-

sions, measuring ROI from partner marketing, ROI from end user marketing and expansion of reach.

1. **Partner engagement:** This channel marketing metric focuses on how well you are engaging partners across various partner types, geography and channel programs. A state-of-the-art channel marketing automation platform should dynamically show clear engagement metrics.
2. **Program utilization:** Every company has ongoing programs in place to drive channel marketing. They key is to figure out the core metrics of those programs, in terms of partner recruitment, partner training, multi-partner demand generation and incentives programs. It's essential to have a channel marketing automation platform in place that can allow the channel management team to slice and dice the data to understand what is truly going on in the channel.
3. **Program effectiveness:** Unlike program utilization metrics, which focus on the ways in which partners are engaged in program activities, program effectiveness metrics are focused on measuring the ROI delivered by specific programs. This

applies to both indirect marketing channels (e.g., search and social) and direct channels (e.g.., collateral, email, telemarketing, etc.) as well as marketing programs. These are key channel marketing metrics, and they should allow the channel management team to understand how well each program is meeting its objectives, as well as driving ROI.

4. **Partner portal effectiveness:** Partner portals play a critical role in communicating to the partners what is going on with the various aspects of the company's channel marketing programs. They also provide partners with access to all necessary tools related to program components like marketing, sales and incentives.

5. **Sales reach:** The very purpose of a channel is to extend reach, but very rarely do companies run territory analysis to understand over- and under-penetration from an end-user demand perspective. We will discuss in detail how to do this separately, as it requires partner profiling. The important point here is that sales reach is an essential metric when it comes to channel marketing program selection. If you don't understand what is selling where, program selection and execution is a little like shooting in the dark.

6. **Return on incentives:** These very important channel marketing metrics measure the effectiveness of three core incentives programs: co-marketing funds (or market development funds), sales rewards and rebates. Without a proper partner relationship management platform, it is almost impossible to track these metrics dynamically. That's an important consideration, since most channel incentives change dynamically on a quarterly and bi-annual basis. Companies that can track incentives dynamically can make rapid adjustments, quickly re-aligning behind successful programs and redirecting resources from programs that are not working.

7. **Partner sales velocity:** This is obviously a channel sales metric, but it is also an important indicator for effective channel marketing. Since marketing enables sales – with customer awareness, new leads and closing tools – it's important to understand which partners are increasing velocity, and which marketing programs and tools are associated with those successes.

8. **Partner repurchase rate:** When it comes to top-tier partners in a broadly distributed channel, most companies have a good sense of the repurchase rates of their top partners. However, this is a very important metric to track for partners who are not repeat buyers of the company's products and solutions. Why? Well, when you look at this output metric in light of the relevant input metrics for channel marketing mentioned above, you will enhance your understanding of what is driving revenue forward (from a partner perspective) and what is not.

9. **End-customer repurchase rate:** We know that two core

factors increase end-customer repurchase rate: solution value and reach. The two factors are tightly linked. Assuming there is a compelling value in the solution, the key is to make sure that there is enough market coverage via a healthy and capable channel network so the end-customer has multiple solution providers that can adapt and grow with their needs when they're ready to repurchase. The partner who sold to an end-customer the first time may not be the partner who is able to keep up with the growth of the end-customer's business requirements over time. Therefore, it is essential that your channel marketing efforts have a broader reach (which can also be indirectly measured by the repurchase rate) so you have the opportunity to recapture those customers through other partners. Looking at repurchase rates is one way to determine if your reach is sufficiently broad.

10. **Partner satisfaction rate:** Finally, one of the most important channel marketing metrics measures partner satisfaction rates. We will discuss in detail how to measure satisfaction and loyalty in another post, but an effective channel marketing automation platform should provide dynamic online survey tools and capabilities that can track partner satisfaction rates and core drivers in an effective way.

As you look at this list of 10 core metrics, you may be wondering what is missing. I can think of two things: granular sub-metrics in each of these areas, and essential channel sales metrics. Remember, we can only see what we measure. With that in mind, it is essential that any channel management team that is striving to produce better results for their partners, end users and the entire ecosystem properly align their channel program, processes and tools to make sure these core metrics are visible.

> **"** *Today, unified channel management is changing the way companies invest, track and improve ROI from their channel marketing activities. A core set of channel marketing metrics plays a critical role in driving better ROI.* **"**

④ 15 Channel Sales Metrics You Must Track

There is a great saying – what you measure is what you get, and when it comes to sales, it is not only true but also drives the future sustainability and growth of a company. If you are selling through a channel partner network, just measuring simple sales out and not tracking some of the other input metrics (as listed below) could lead you to a blind alley and end up not knowing when the next downturn will hit you.

The good news is that, there is about a set of core metrics that you can easily track if you are using a best-of-breed channel marketing automation platform. Here is a brief overview of these five core output metrics and what you need to measure and track to drive profitable sales growth.

1. **Total and Average Revenue Per Partner:** This is almost equivalent to revenue per employee metric. When you do this analysis, and most companies do this, you will see productivity varies greatly across partner tier – top, medium and entry level partners. Tracking this in a dynamic basis is critical to drive sales engagement.

2. **Revenue Mix Analysis:** This is predominantly done by product line, geographies and territories. Most companies use this data to create their market share analysis, but this needs to be directly correlated with other input and output metrics to draw a complete relationship.

3. **Percent of Revenue Growth Rate of Your Partner Tiers:** This is a number one output metric that you would want to track to see how your partners are growing. Understanding this across various product lines is critical for success. This would vary by partner type, product type and geo; however, once you know this you can make strategic resource changes to drive better results.

4. **Gross Profit Per Tier:** At the end of the day it is not about just revenue, but about absolute profit that you are able to generate via the channel. Partner profitability varies greatly based on your ability to track your internal costs (technical support, channel sales, channel marketing, programs, etc.) and profit generated by various partner tiers, e.g., your top 10%, 11-25%, 26-50% of your resellers, etc.

5. **Percent of YoY Increase In Channel Revenue & Pro-**

ductivity: This is your final measure of progress on a year over year basis. In order to do this you will need you to know your revenue growth, which all companies do, but also your detailed cost infrastructure to support your channel, which at times becomes a bit harder to get to, due to product and process complexities. However, efforts spent in this area are critical to drive a much finer approach towards overall partner sales management.

Across our customer base on a worldwide basis, we see various level of maturity when it comes to channel sales metrics. However, we consistently see that organization that spend more time understanding channel sales metrics, are also more focused, has fewer initiatives, but drive more growth per initiative. This is a qualitative observation across seventy plus accounts ZINFI has on a global basis and we would love to hear from you what metrics you are tracking and how it is driving your profitable growth.

Channel success comes when setting up proper expectations with your channel team and partner network, but then having the ability to monitor and track a core set of performance metrics. Earlier in this article, we discussed the five core output metrics a channel sales organization must track. However, output metrics are driven by a set of processes, programs and people that are directly linked to a set of input metrics. Your channel marketing automation platform should enable you to track these ten metrics described below. These input metrics will create insights of what is actually happening in your channel; however, the key is to correlate these input metrics to core output metrics to understand impact of each of these metrics. Again, your channel marketing automation platform should allow you to run these analysis using dynamic dashboard capabilities.

1. **Percent of Active Resellers:** Most companies with a broad or even a focused channel deal with sales per partner variable. It is important to know what portion of the channel partners are selling consistently quarter over quarter for the past four quarters, as this will drive the next level of strategic metrics to figure out how to increase sales out.

2. **Channel Attrition Rate** (% Active Resellers Drop Out Rate): If you have a channel partner network of a few hundred or more resellers, system integrators, etc., chances are on an annual basis a portion of your network will stop selling your products and services. Tracking this actively and figuring out is critical to make sure you know what is truly going on.

3. **Percent of Your Reseller Base Generate Half of Your**

Revenue: Why is this important? Well, simply when you are selling through a broad channel like most companies; chances are you have limited resources and bandwidth, and need to maximize return on channel sales resources. Therefore, knowing who and where to focus is critical.

4. **Percent of Renewal Rate on Maintenance & Service Contracts:** Most companies selling through the channel today has add-on and renewal sales. While channel may be a great way of fulfilling existing demand, partners tend to lack resources and focus on systematic contract renewals - be it subscription contracts, warranties or services. Therefore, tracking this in detail and driving actions based on data can greatly improve your top and bottom line; because it is always easier to grow current accounts vs. get new ones.

5. **End User Satisfaction With Your Reseller Base:** With ris-ing complexities in technology products and deployments, it is essential to have a fully trained and certified partner network, because at the end of the day it is the quality of technical engagement between your resellers and your end-users that would drive customer satisfaction. Therefore, measuring end user satisfaction on a regular basis is critical to know where you need to invest to overcome gaps and grow your strengths.

6. **Partner Satisfaction:** Along with your end-user satisfaction analysis, you will also need to know where your partners stand with your products, services and support. This understanding drives your ability to focus channel marketing and sales resources to drive optimum results. Even a simple integrated survey tool can capture your partners' experiences in a systematic way.

7. **Partner Certification Rate:** This is a critical metrics that allows you to measure depth and breadth of your channel. Organizations that are using a Learning Management System (LMS) tend to have an easier approach towards tracking these metrics, but even without a fully functional LMS you should be able to track this using your Partner Relationship Management platform.

8. **Return on Your Market Development Funds:** This is a crit-ical metric to track not only to eliminate waste and focus on critical programs, but also to strategically align your marketing activities to and through the channel. Most companies that have a Partner Relationship Management platform along with Market Development Funds (MDF) tracking can easily track this metric and drive proper actions globally and locally.

9. **Graduation Rates** (from bottom tier to mid tier, mid tier to top tier, etc.): Channel is a dynamic environment. New partners are joining, some partners are leaving, but also some partners are moving up from entry tier to mid-tier to top tier of your channel medallion program. Making sure you know how this is happening, and managing this movement pro-actively vs. being a passive observer is critical to maintain a profitable growth model via your channel.

10. **Total Channel Marketing & Sales Cost to Channel Rev-enue Ratio:** This is mostly an efficiency metrics and return on investment. In most organization the total cost of sales - including channel marketing, etc., - need to be less than 25-30% for a run rate business to create a profitable growth model. However, if you are trying to build out your channel, and you are at an early stage of doing that, this number could be substantially higher.

If you are using a basic CRM platform you should be able to track some of these, but CRMs do not work well as a Partner Relation-ship Management (PRM) platform, which is essential to give you an end-to-end visibility. Therefore, as you are planning forward to build out a metrics-based high performing channel, you should take a look at the rapid evolution of PRM tools that are available in the market today.

> *Channel success comes as a result of setting up realistic, if ambitious, expectations with your channel team and partner network, but these mean nothing without the ability to monitor a core set of performance metrics.*

❺ Right Metrics for Your Channel Marketing Management Platform

As a provider of a leading SaaS-based channel marketing management (CMM) platform, we get asked a lot about the right set of metrics an organization should consider when they are deploying such a platform globally. Our answer is always, "It depends." Do I sound like a lawyer? If I do, then I am sorry, but I am not trying to be mysterious. It is truly an honest answer.

While there are core metrics tied to return on investment (ROI) that any organization should look for to measure the impact from their channel marketing management platform, the answer is not really that straightforward. With that said, let me see if I can lay out a logic and a path that will help your organization pick the right set of metrics to drive ROI from a recently procured channel marketing management platform.

First, let's briefly define business metrics, and then we'll discuss the importance of thinking through what makes sense for your organization. As per Merriam-Webster, "metrics" refers to "a standard of measurement." On online search for "business metrics," yields the following definition from TechTarget: "A business metric is a quantifiable measure businesses use to track, monitor and assess the

success or failure of various business processes." Or Investopedia: "Metrics are parameters or measures of quantitative assessment used for measurement, comparison or to track performance or production." All three of these definitions suggest that, when it comes to setting metrics (or measurements) for business activities, the goal is essentially to monitor progress and measure success.

To clearly identify the right metrics for the deployment of a channel marketing management platform, I would like to focus on two activities associated with business metrics. First, monitor progress. You do that essentially on a core set of input and output metrics. Second, measure success. Essentially, you quantify success in terms of dollars and cents to make sure the investment is providing the anticipated return.

So, let's begin with a set of metrics that you may want to consider monitoring. Typically, when you are deploying a channel marketing management platform, you will need to consider three main phases of deployment. For each phase, you should have clear business objectives that define what you are trying to achieve. Once you have your objectives, then and only you can establish

metrics to monitor progress and measure success. So, let's go through these three phases in sequential order, but at the same time let's also address both business objectives and business metrics.

1. **Launch phase:** During this phase, the primary goal is to drive quick success so that you can show progress, build buy-in and generate excitement within your organization and share success. It is essential to pick a pilot group of partners—ideally, in a large horizontal market segment—where you can launch, learn, adapt and tweak for ramp.

   Your goal will be to drive utilization of your channel marketing management platform as broadly as or narrowly as you think necessary. However, instead of worrying about the end state, let's keep the focus on near-term success. We have repeatedly seen companies that try to launch with too many objectives and with too broad a vision lose momentum and traction, because they were never able to show success from immediate launch. (Of course, there may be other factors at play as well, including unforeseen internal organizational changes.)

   Yes, we are all taught to begin with the end result in mind, but if you launch with too broad a scope, the end of your channel marketing management effort may be near. Therefore, while it is important to know where you want to go in the launch phase, it is even more important that the metrics be relatively manageable, logical and measurable over a short period of time. It is absolutely crucial to build organizational support and buy-in. Launching a channel marketing management platform is not easy, and picking the wrong business metrics can kill the program quickly.

   With this as a backdrop, let's think about the core input metrics in this phase that should be tied to a subset of your top- or mid-tier partners participating in the program. We have all learned from statistics that to project a pilot program representing a full-scale program you need a representative sample. As you select the metrics to monitor progress, the first parameter you need to think about is how many partners—and which ones—you will invite to use your newly launched channel marketing management platform, and how many are already using it.

   If you have a focused channel with a few hundred partners in each region, then picking one representative of each country and about 10% of your target partner base should be a reasonable sample to start with. Once you've established this target, you have to think about who to include in this initial rollout. This may sound simple, but it's not. At the end of the

day, your channel marketing management platform needs to add value to a partner's business and marketing game plan.

No matter how great the platform is and how loaded it is with great content, you cannot force-fit a channel marketing management platform onto every partner. You really need to think through which partners will benefit the most and how they can use the platform to complement the capabilities they already have.

For example, if you want your large partners to leverage the platform, even if your large partners all have in-house marketing automation capabilities of some kind, you should probably think about the specific tools that they would likely be most interested in. Typically, this would include web content syndication, which they can use to showcase your products on their website with relative ease, and collateral co-branding. However, when it comes to running events or integrated multitouch email or microsite campaigns, chances are they are still going to use their in-house platform. Therefore, you probably shouldn't pick a group of large partners with in-house capabilities if you are trying to demonstrate the usage of multi-tactic integrated campaigns using your newly deployed channel marketing management platform.

On the other hand, if you are going after medium-to-small-size

> ❝ *While large partners have in-house capabilities and therefore can download co-branded assets and execute, the opposite is true of midsize and small partners: They can leverage your platform, but they are likely to succeed only if you also provide some marketing services – either free of charge or by offering market development funds (MDF) or offering some other cooperative arrangement. Often we see vendors do the opposite.* ❞

partners who lack in-house marketing automation and don't have the capability to develop integrated multi-touch campaigns, then you could absolutely expect them to use various tools and tactics from your newly deployed channel marketing management platform. However, with this group of partners you now have to worry about the campaigns themselves, and what other marketing concierge services you are willing to provide.

While large partners have in-house capabilities and therefore can download co-branded assets and execute, the opposite is true of midsize and small partners: They can leverage your platform, but they are likely to succeed only if you also provide some marketing services – either free of charge or by offering market development funds (MDF) or some other cooperative arrangement. Often we see vendors do the opposite. They expect their large partners to use the platform because the large partners have MDF. Then it turns out those partners do not want to use the platform and find all kinds of excuses to avoid doing so. This is a doubly missed opportunity for you to serve both groups in the right way.

As you can see, then, selecting the right business metrics depends upon first identifying the right strategic approach to deploying your channel marketing management platform.

Since everyone's channel is different, you need to think this part through and make sure that the approach you decide on makes sense specifically for your channel.

Once you have settled on an approach and fully understand what will likely drive partner adoption, then the next goal is to make sure you measure partner usage of various tools and campaigns by partner type, geography, location, etc., carefully examining potential cause-and-effect relationships. For example, if the data you already have indicates that providing incentives correlates with increased adoption, you may want to add incentives to the set of metrics to track.

A typical launch phase lasts three to six months, depending on how transactional or complex your products and solutions are. If the sales cycles are short, you can expect to run a three-month launch phase, but if the sales cycle is long—for example six to twelve months—then you may want to run a six-month launch and roll-out program.

The goal in this first phase is to learn and refine the metrics for the ramp phase. Therefore, it is critical to collect input data—e.g., how many partners you have reached out to, how many signed up to learn, how many were trained and how many ran one or more campaigns. Your channel marketing

management platform and your marketing concierge agency should be able to track all of these variables for you in a dynamic fashion.

2. **Ramp phase:** Once you have rolled out your channel marketing management platform in one or two key markets, gathered data related to partner adoption rate, usage and lead generation, the next phase is to put together a solid global roll-out and ramp phase.

In this phase, your focus should be on picking three or four horizontal programs, tied to campaigns and sales incentives, across the broadest product portfolio that most partners can sell, and establish a highly scalable partner onboarding, training and execution engine. You should align all concierge activities in two ways:

A. First, the partner concierge team should focus on supporting high-value (and high-volume) partners directly by reaching out and making sure they are aware of the kinds of campaigns and other assets that are available. They should also put together multi-quarter execution plans, since most of these partners are building their core business around your solutions. Your channel marketing team and channel account management team should be working very closely with your marketing concierge team in driving this. You should also align sales incentives and rewards behind these partners. Remember—these are the partners that drive a lot of business for you, and you need to make sure they are taken care of.

B. Second, you should pick a horizontal program—such as a prospecting blitz—and reach out to the broadest part of your channel with a six-to-nine-month program. This program should be focused around doing a few things right, like having each partner participating in the program syndicate your content syndication showcase, stream social syndication and run an integrated campaign—whether it's email, microsite or event. There should be rewards and recognition tied to the most active partners who are generating the most inbound leads using search and social campaigns, and who are generating the most opportunities.

The primary goal in this ramp phase is to build a repeatable motion where a broad set of partners are now leveraging your marketing assets and are becoming more familiar with your channel marketing management platform and programs. It is essential that you keep the programs in place and resist the common temptation to change programs every three months. It takes a while for a partner to find out about a program and then execute. Repetition and persistence are essential to

driving partner adoption in this phase.

You should also formalize the reward and recognition process by engaging senior leadership from your sales and marketing teams and providing special marketers' awards during your partner events and in other contexts. Remember, success breeds success. Tracking engagement and success metrics at every possible level—and recognizing and rewarding success when it happens—is essential to maintaining momentum.

Of course, from a business metrics perspective, you should track things like the number of showcases that are being syndicated, the streams that are being socially shared, the number of impressions created using email blasts and other outbound activities. You can also track the number of videos and white papers that are being downloaded. You should be tracking as many input metrics as possible, and your channel

> **❝** *The key assumption here is that during the launch and ramp phases, you have put together all necessarily connectivity with your internal business systems for data to flow seamlessly to and from your channel marketing management platform to give you accurate output data.* **❞**

marketing management platform should be able to provide these to you in a dynamic fashion.

In addition to these input metrics you must also track output metrics, such as the number of marketing qualified leads (MQL) generated, the number of sales qualified leads (SQL) generated, and the number of opportunities generated that were ultimately registered as deals.

Finally, the holiest of all metrics is sales. Yes, if you can track the dollar amount of the overall investment (platform, programs and people) and tally the sales that you have generated since making that investment, then you have begun to truly

track the performance of your investment in your channel marketing management automation. However, it takes around 12 to 18 months for most organization to reach this stage. Consider that most large enterprises operate in a quarterly framework, and 12 to 18 months is only four to six revision cycles. With that in mind, try to select reasonable metrics and targets that you and your organization can realistically hit to build confidence and give yourself opportunities to celebrate success.

3. **Optimize phase:** Once you have gone through your ramp phase and started to link your input metrics with your output metrics, now is the time to start optimizing performance by varying campaigns, program tactics and incentives.

If you have a broad channel, the key is to build on the foundation you have created over the past 12 to 18 months. Don't try to reinvent the wheel. It takes a while to build momentum in the channel. If something is not working, of course change and fix it. However, if it is working—if, say, partners are logging in and running campaigns and programs—then don't mess with it too much. Just keep loading campaigns and programs, and drive awareness and adoption via your channel marketing concierge network.

Remember, success can be boring, so don't get distracted when things are working and ramping. It's important to resist that tendency to wonder whether you are being sufficiently creative or not. We have seen many instances where organizations kill or destroy perfectly high-performing programs just for the sake of change. In many ways, the optimize phase is going to be the hardest phase. You have to think through any possible changes judiciously, and keep your focus on truly understanding cause-and-effect relationships on a global level.

Definitely in this phase—and probably in the ramp phase as well—you should put together a detailed partner feedback program. Your concierge team should regularly reach out to your partner base and ask what is working and what is not. Make sure you don't rely solely on anecdotal feedback. Even the feedback you receive is qualitative, put together a formal survey, use a questionnaire, and gather data in an appropriate way. Don't let yourself be easily swayed by individual positive or negative feedback.

As I noted earlier, if you are managing a broad channel, you need to be sure you are getting the right feedback and understanding cause-and-effect relationships. Then and only then should you consider making changes. It has taken you nearly 18 months to get to this point after a lot of hard work and

Summary of Core Metrics for You to Consider – Measured Quarterly

1. **Input metrics (by country, partner type, etc.) to monitor progress**
   a) Total number of partners selected in the program
   b) Total number of partners reached out to onboard
   c) Total number of partners onboarded into the program
   d) Total number of partners signed up to run campaigns

2. **Output metrics (by country, partner type, etc.) to monitor progress**
   a) Total number of partners running one or more campaigns
   b) Total number of email campaigns run
   c) Total number of event campaigns run
   d) Total number of syndications (web and social)

3. **Performance metrics (by country, partner type, campaigns, programs, products etc.) to measure success**
   a) Total number of end user impressions
   b) Total numbers of MQLs (downloads, video views, etc. – define key lead score for MQL)
   c) Total number of SQLs (BANT qualified)
   d) Total number of opportunities
   e) Total value of opportunities (in $)
   f) Total value of deals registered (in $)
   g) Total sales generated (in $)

4. **Return on investment (ROI) metrics to measure success**
   a) Total $ invested (CMM platform cost + internal management cost + concierge cost + MDF spent)
   b) Total $ generated from sales
   c) ROI = generated / invested > 20x

investment, so make your decisions based on the data rather than anecdotal information.

The primary metric you should focus on in this phase is return on investment (ROI). Calculate the total dollars invested in the channel marketing management (CMM) platform, along with other program costs—e.g., content creation, program management, concierge investment, and campaign costs tied to telemarketing, advertising and so on. All of your input activities and investments should be pointing directly towards hard sales. The key assumption here is that during the launch and ramp phases, you have put together all necessarily con-nectivity with your internal business systems for data to flow seamlessly to and from your channel marketing management platform to give you accurate output data.

Now that I have walked you through the three core phases of deployment of a channel marketing management platform and shared with you an approach on how you should be thinking about deployment and core metrics, the next most important consideration is the notion of critical mass. Yes, too often organiza-tions forget that success is a function of expectations, but I would also emphasize that your expectations must be grounded in re-ality. You may stretch the goal, but you also have to think through what you can expect from your investment, and how fast you can expect to see return. This is possibly the most important metric to think about. The key question to ask is, "How long will I have to wait to fully optimize return from my channel marketing management platform?" The answer should be measured in three phases, as outlined above.

In Phase 1 (launch phase) you should be able to justify the in-vestment you are making in the platform, as well as in the people required to drive adoption. You should clearly see pipeline gener-ated that represents 10 to 20 times the size of your investment. In Phase 2 (ramp phase), this metric should increase to 20x to 30x, and in Phase 3 (the fully optimized phase) you may even see 30x to 40x return on your investment. However, don't expect to get there in one step. Many companies roll out too fast and set expectations that are too high, only to end up with disappointment, loss of con-fidence and, worst of all, poor partner satisfaction.

So, when you are thinking about picking the right metrics, the most important thing to consider is the core activities in each phase that make the most sense. Once you have figured out the logic of the roll-out over a one-to-two-year period, then and only then will be able to pick the right metrics and track the right input and output parameters that will truly make a difference.

❾ Definition of Unified Channel Management (UCM)

Unified Channel Management (UCM) allows a vendor organization selling through the channel to take an integrated approach by aligning channel policies, channel programs, channel people (both internal employees supporting the partner base and employees of external partners), business process automation and channel partners to build a high-performing global channel. This unified approach to channel management requires end-to-end automation of three core sub-processes:

- **Partner Relationship Management (PRM) –** These partner management activities focus on optimizing and automating internal partner management processes to make it easier for partners to do business with the vendor. A properly configured PRM solution significantly reduces operation costs, efficiently allocates resources behind the partners who have the highest potential for driving profitable growth and significantly increases partner satisfaction

- **Partner Marketing Management (PMM) –** These channel marketing activities focus on enabling channel partners to drive demand from their prospect and customer based by leveraging the vendor's marketing assets and tools. A PMM solution can help vendors optimize the use of market development funds, stimulate purpose-driven demand generation and exert control over brand extension via channel partners.

- **Partner Sales Management (PSM) –** These channel sales enablement activities focus on enabling both internal channel-focused resources (channel account manager, field marketing managers, distribution managers, etc.) and channel partners to close more deals faster. A properly deployed PSM solution gives marketing and sales team members insight into the effectiveness of specific marketing assets, and sales campaigns and can significantly increase sales closure rates and predictability via a distributed partner network.

Core Modules Overview

Native Applications for Mobile Devices
The Mobile module comes with a set of mobile apps that are available for both the iOS and Android platforms. Administrators can define what applications are available via mobile app and what users have the access rights via mobile.
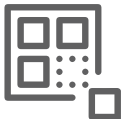
Alerts & Notification Management
The Alert module aggregates all system alerts via a unified console and allows users to set one or more notification preferences via email, SMS or mobile app. Users can also control the frequency of alerts, including individual or aggregate alerts.

FluidCMS™ Content Management
The FluidCMS™ module allows administrators to use drag-and-drop tools to create and manage web and campaign content to build dynamic and personalized portal pages, campaigns and other content on the fly.

FlexiFlow™ Workflow Management
Using FlexiFlow™, administrators can set up different application layouts, approval logics, alerts, reports and other functions to automate any business workflows. This capability allows organizations to dynamically adapt to rapidly changing business needs.

Partners Profile Management
Partners Profile Management granularly manages partner records - accounts, contacts, performance data, etc. Using this module, organizations can segment partners effectively into groups with various parameters for optimized management capabilities.

Identify and Access Management (IAM)
With the Identify and Access Management (IAM) module, administrators can dynamically set up and manage users, groups and granular access rights to various portal pages, applications, campaign contents and assets.

Enterprise Change Management
Enterprise Change Management keeps track of all changes made to the portal related to groups, users, content, workflows, etc. This is essential for audit purposes but also for reversing changes that have been made unintentionally or intentionally.

Business Intelligence Reports
The Business Intelligence Reports module provides hundreds of default reports as well as tools for creating custom reports. This allows users to understand what is working and what needs improvement in channel performance/ programs at a local and global level.

Centralized Interconnection (CENTRi™) Management
The CENTRi™ (Centralized Interconnection) module allows administrators to seamlessly connect to third-party applications like CRM, LMS, ERP and POS via an easy-to-use connection management and field mapping interface, including SAML 2.0 SSO.

Users & Group Management
The Users Management module allows administrators to quickly set up users and assign them to various groups and profiles. Users can be added manually or set up via group upload using Excel or third-party SSO.

zinfi

Expand Modules Overview

Products Details Management
With the Products module, organizations can upload variety of product-related content for use in both marketing and sales assets and activities. This module can also be used for Configure Price Quote (CPQ) and deal registration.

Documents Library Management
Documents Library enables channel organizations to share partner-facing documents with various partner users based on status and access rights. Documents can be dynamically published and configured with expiration dates/times based on custom rules.

Projects & Tasks Management
Seamless collaboration with internal and external team members on projects and programs is easy with the Project module, which comes with tasks, notebooks, file-sharing and messaging features.

Co-Branded Assets Management
The Co-Branded Assets Management module enables an organization to provide digital assets to channel partners, who can then co-brand these assets and reuse them for various marketing- and sales-related activities.

Communicate To Partners Management
The Communicate module comes with a cluster of marketing tools, such as email, microsites, events and social, which can be used to recruit, engage and enable partners. These tools can be made available to all internal channel team members.

Partner Support Management
The Support (Help Desk) module gives organizations the tools they need to establish a structured support infrastructure for end users that extends above and beyond traditional product and services support. The module uses an industry-standard ticketing system.

Marketplace Management
Organizations can use the Marketplace to establish a list of complimentary products and services that the partners can purchase for their business use. This module provides complete order management capabilities to third-party providers.

Community & Discussions Management
The Community module enables organizations to socially connect—both internally and externally—to facilitate communication and collaboration. This module seamlessly integrates with multiple UCM modules, but it can also work in a standalone fashion.

Partner Survey Management
The Survey module can be used by anyone from the channel organization to get feedback from their partner base. Survey data can be aggregated via a reporting engine or housed individually within partner records.

Partner Locator Management
Use Partner Locator to dynamically create a partner directory - making it easy for end users to find and contact partners who offer the right solutions. All leads generated from rule-based searches are fed into the UCM Lead module for distribution to specified users.

Partner Relationship Management (PRM)
Modules Overview

Partner Business Plans Management
The Partner Business Plans Management module enables an organization to develop business plans by working with internal and external partner stakeholders to ensure plan execution and compliance.

Deals Registration Management
Deals provides set up for deal registration criteria and workflows for their partner base using UCM's FlexiFlow and CENTRi modules. Workflows can be very simple or can cover complex, comprehensive deal registration processes.

Partner Contracts Management
The Partner Contracts Management module enables an organization to dynamically manage and keep track of all the contractual documents that channel partners sign during the various phases of the partner engagement cycle.

Rebates Management
With Rebates, set up company rebates based on various performance targets and business rules. This makes it easy to set up an application process for partners to establish eligibility for rebate programs, as well as claiming rebates.

Partner Learning Management
The Partner Learning Management module enables an organization to manage channel partner training and certification by various partner tiers and types to grow partner competencies in a systematic way through structured curricula.

Partner Leads Management
Partner Leads Management enables lead distribution to your partner base and manages the entire "contacts to contracts" process. It can help engage partner sales reps via round robin, shark tank and other lead management strategies.

Partner Onboarding Management
Partner Onboarding Management automates partner recruitment and onboarding processes via step-by-step activities. Based on partner type, engagement and other variables, you can create different onboarding tracks.

Market Development Funds (MDF) Management
Market Development Funds Management enables organizations to allocate MDF and co-op funds to partners. Its also used to help partners apply for program funding and claim compensation through proper proof of execution.

Partner Marketing Management (PMM)
Modules Overview

Search Marketing Management
The Search Marketing Management module provides dynamic linkage between paid ad (Google AdWords, Facebook, etc.) search network and marketing campaigns, and is used for multi-partner inbound integrated lead generation.

Microsite & Landing Page Management
The Microsite & Landing Page Management module enables an organization to set up co-branded microsites or landing pages. This allows partners to engage their prospects and customers via single-touch or multi-touch digital drip campaigns.

Social Syndication Management
The Social Syndication Management module enables an organization to syndicate social media content via the channel partner network. Partners can autostream or manually customize each social feed for instant or delayed posting.

Event Marketing Management
Event Marketing Management enables an organization to set up trigger-ready multi-touch "event in a box" campaigns that can be quickly co-branded and customized, allowing channel partners to engage their prospects/customer base.

Direct Mail Marketing Management
The Direct Mail module allows for set up of co-branded direct mail templates for partner use in the form of post cards, brochures and other formats. This module can also be connected to national printers for seamless shipping and mailing.

Web Syndication Management
Web Syndication Management enables distribution of product and solution web showcases via a partner's website. Web syndication amplifies organizational reach and lead generation through a distributed channel partner network.

Email Marketing Management
The Email Marketing Management module enables an organization to set up multi-touch co-branded emails. These emails create the foundation of various integrated campaigns, whether they lead to microsites, events, syndication or call campaigns.

Campaign Library Management
The Campaign Library module enables channel organizations to provide co-brandable, single- or multi-tactic campaigns to its partner network through a user-friendly, logical interface searchable by keywords and tags.

Partner Sales Management (PSM)

Modules Overview

Rapid Dialer Management

The Rapid Dialer Management module provides a high-volume automated dialing capability to partner sales reps for more efficient telemarketing. The module makes it easy for reps to follow up on leads and develop sales qualified opportunities.

Buyers Engagement Management

The Buyers Engagement Management module provides tools for channel sales reps and their partner reps for sending digital content such as emails, landing pages and solution showcases to prospects, and for tracking engagement.

Configure Price Quote (CPQ) Management

The Configure Price Quote (CPQ) module enables an organization to offer special pricing and quotes approval mechanisms for partner sales reps, channel reps and channel management team members.

Channel Data Management (CDM)

The Channel Data Management module enables an organization to access point-of-sales data from distributors and resellers to track performance by region, territory, reseller and product, and to proactively manage inventory.

Sales Gamification Management

The Sales Gamification Management module enables an organization to promote various sales rewards programs. Organizations can use a leaderboard to stimulate competition and drive rep engagement in a virtual environment.

Commissions Management

Both internal channel teams and external partners can use the Commission model to align with quarterly programs, campaigns and run rate business. Users can set up business logic with UCM's FlexiFlow module.

Sales Rewards Management

Sales Rewards allows set up of channel sales programs for internal/external users & progress tracking in a unified interface. This module also allows filing of reward claims & stack ranking status. The logic is built via UCM's FlexiFlow module.

Sales Desk Management

The Sales Desk module seamlessly integrates with the Leads, Deals, Support and CPQ modules to provide a unified dashboard for order management. Both internal and external users can access this dashboard to communicate and track status.

About ZINFI

ZINFI Technologies, the leader in Unified Channel Management (UCM) innovation, enables vendors and their channel partners to achieve profitable growth predictably and rapidly on a worldwide level. Headquartered in Silicon Valley, USA and founded by channel veterans with extensive global channel management experience, we at ZINFI see an immense opportunity to build high-performing sales channels by deploying an easy-to-use, comprehensive Unified Channel Management platform that streamlines and manages the entire partner lifecycle.

ZINFI's Unified Channel Management innovation incorporates three core state-of-the-art SaaS applications—partner relationship management automation, channel marketing management automation and channel sales management automation. In 26 countries, these three core UCM SaaS applications are also locally supported by ZINFI's global marketing services team members.

ZINFI's Unified Channel Management solutions enable organizations selling via the channel to integrate the full spectrum of channel partner management activities—from recruitment, onboarding, training and certification to lead management, co-branded demand generation, sales performance and success, and on to fulfillment and renewal management. Powered by the efficacy and superior experience of ZINFI's UCM solutions, any organization can build a high-performing channel and realize increased partner sales return on investment.

The word ZINFI, to us, means Zero to Infinity—reflecting our mission to enable customers, employees and communities to realize their infinite potentials. In its most applied form in our day-to-day existence, the word refers to an analytical and mathematical approach to marketing and sales methodologies, an approach that allows our customers to realize the true potential of their own products and services and to continuously grow their business via the channel.

![zinfi logo]

www.zinfi.com

Contact Us

AMERICAS

sales.noram@zinfitech.com
6200 Stoneridge Mall Road, Suite 300
Pleasanton, CA 94588
United States of America

EUROPE, MIDDLE EAST AND AFRICA

sales.emea@zinfitech.com
Davidson House
Forbury Square, Reading
RG1 3EU, United Kingdom

ASIA PACIFIC

sales.apj@zinfitech.com
3 Temasek Avenue
#21-00 Centennial Tower
Singapore 039190