



# Deal Registration Best Practices Guide



## Table of Contents

### Part I - About this Book

- Letter from the CEO ..... 4
- How This Book Is Organized ..... 5

### Part II - Deal Registration Overview

- Making Deal Registration Work For Your Channel..... 6
- Deal Registration Software Drives Partner Satisfaction ..... 8
- The Right Deal Registration Program Can Boost Your Channel Sales ..... 10
- 3 Things Your Deal Registration Program Must Have..... 12
- 5 Questions to Ask When You Set Up Deal Registration Software..... 14
- Why Most Deal Registration Programs Don't Work..... 18

### Part IV - Introducing ZINFI

- Definition of United Channel Management (UCM) ..... 20
- Core Modules Overview ..... 21
- Expand Modules Overview ..... 22
- Affiliate Marketing Management (AMM) Modules Overview ..... 23
- Partner Relationship Management (PRM) Modules Overview ..... 24
- Partner Marketing Management (PMM) Modules Overview ..... 25
- Partner Incentives Management (PIM) Modules Overview ..... 26

## A Letter from the CEO

The Leader in Unified Channel Management



Dear Channel Professional:

Thank you for downloading this new guidebook on deal registration best practices. For organizations marketing and selling in a channel environment, deal registration can be an important tool for protecting opportunities for partners who have already invested significant time and effort into developing those opportunities. An effective deal registration program helps vendors eliminate channel conflicts, protects customers from being pursued by multiple partners for a specific opportunity, and rewards channel partners for approaching deals according to rules that have been clearly defined by the vendor.

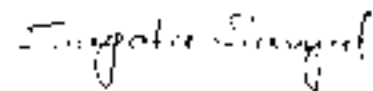
Unfortunately, many deal registration programs do not meet these objectives. A common mistake vendors make is to design programs that do not take into account their partners' own business interests. Programs that focus too narrowly on short-term sales objectives or on specific campaigns often fail to achieve traction with the partner base, and partners may also be wary of programs when the benefits of participation are not communicated clearly.

The Deal Registration Best Practices guidebook is a valuable resource for vendors who wish to take a more systematic approach to deal registration that reduces complexity, is transparent and fair, provides appropriate incentives that motivate partners to participate and generates data that can provide insight into the variables that determine program success. The guidebook will help you understand the market parameters, partner criteria, deal protection logic and review processes that are most likely to ensure the success of a deal registration program in your channel. Topics covered include deal protection, customer satisfaction, performance analysis and management, alignment with other programs, and factors to consider when selecting and implementing deal registration software.

Whether you read this guidebook from start to finish, or skip around and focus on the topics that are most relevant to you now, we hope you will walk away with new ideas and practical advice that you can start implementing today to make a sustainable difference in your organization.

As always, if you need help, have any questions or need more information, please don't hesitate to contact us at any time.

Sincerely,



Sugata Sanyal

CEO and founder of ZINFI Technologies



## How This Book Is Organized

This booklet is divided into three sections. Section I provides a brief introduction and a letter from ZINFI's CEO. Section II presents a series of articles that focus on key considerations for developing successful deal registration programs. Topics include: the three most important factors driving the success of deal registration programs, five questions to ask when setting up deal registration software, the reasons most deal registration programs fail, and how to make deal registration work for your specific channel environment. The last section of the booklet, Section III, provides a brief introduction to ZINFI's integrated solutions that together comprise its industry-leading Unified Channel Management platform: partner relationship management (PRM), partner marketing management (PMM), partner sales management (PSM) and global marketing services (GSM).

The observations in this booklet are based on many years of conversations and collaboration with a diverse customer base ranging from startups and midsize companies to global enterprises. At ZINFI, we have a relentless focus on continual improvement of our products based on customer feedback. That means we are always listening to our customers and learning about what is most important to channel professionals across the globe. This guide to deal registration best practices draws upon the principles and insights we have gathered over thousands of interactions with our customers and their partner organizations.

Whether you are new to channel marketing or an experienced veteran, we think you will find plenty of new ideas and lots of practical advice in this booklet that you can use to increase partner engagement and boost your bottom line.

Enjoy!



## 1 Making Deal Registration Work For Your Channel

**D**eal registration is an incredibly important mechanism to not only eliminate channel conflicts but also reward channel partners to do the right things in the right way. Organizations selling through a channel can broaden their reach and increase their sales when they have the right channel programs in place, and deal registration can play a major role in that effort.

Any good deal registration program has three core objectives:

- 1. Deal protection** – The foundation of channel partnership is based on the financial relationship and the competitive edge that relationship can provide to the partner. However, you could argue that the primary competitive edge a vendor can provide a partner is profitability. Therefore, by protecting a deal for a specific partner a vendor can ensure margin protection, along with other incentives the channel program may offer.
- 2. Customer satisfaction** – Once a deal has been registered, it eliminates the opportunity for multiple channel partners

to follow up with the prospect and therefore reduces the “annoyance factor” in selling. Also, the vendor can align sales support resources behind that specific partner in case the deal size is large and requires complex sales support.

- 3. Performance management** – When a vendor aligns its other channel program components, deal registration not only brings in the benefits tied to deal protection and customer satisfaction, but can also provide an intrinsic set of incentives to the partner to sell more and scale faster.

With this context in mind, let's look at some of the deal registration programs that are available today. In most cases, deal registration programs offer basic deal protection and margin enhancement. However, too often deal registration fails to become a strategic component of the channel program that enhances sales velocity and profitability because of the following reasons:

- 1. Complexity** – The larger the organization, the more products it has to sell through the channel. With the

proliferation of products, both the marketing and the sales teams end up repeatedly refining the program, and the program can quickly become highly complex. It is commonplace for the same program to have multiple variations across many countries despite the fact partners have already provided feedback that it is too complex.

- 2. Scope** – In most cases, vendors tend to protect mid-market and enterprise deals and keep SMB deals outside the deal registration program. This makes sense, except when the vendor may distribute SMB leads in an open environment to multiple partners using a lead management system. If this distribution is not properly managed, it can cause major channel conflict and customer dissatisfaction.
- 3. Alignment** – It is crucial to make sure other components of partner programs – e.g., certification levels, rewards and rebates – are fully aligned with the basic scope of deal registration programs. Too many times, components of deal registration programs are changed, but not linked back to the broader channel program.
- 4. Automation** – Lack of automation is a major issue with most channel partners. We consistently see across the channel that most organization tend to use a basic CRM

platform to create their deal registration program, but lack of automated lead distribution and management not only creates confusion and frustration across the channel chain, but also ends up in the loss of opportunities to competitors.

- 5. Analytics** – Understanding what is impacting sales velocity and mix is critical to growing a deal registration program and making it more effective. Sometimes strategic inclusion – such as newly acquired product lines, an upgraded version of a platform, or a service offering that can be only sold through a set of certified partners – can significantly enhance the program. However, without an analytical tool that can slice and dice the data in multiple ways, deal registration programs will often remain a tactical tool and a black box.

If you are putting a deal registration program in place or reevaluating the one you have, the best place to start would be to ask these questions: Will it truly help your partners sell more with minimum channel conflict and friction? Will it maximize profitability from the transaction and align with other components of your channel programs? A simple, properly conceived deal registration program can go a long way to increase sales velocity, partner profitability and satisfaction.





## 2

## Deal Registration Software Drives Partner Satisfaction

Companies selling through the channel, especially in the technology segment, need to make sure that a potential end buyer is not being approached by multiple partners unnecessarily. While competition is healthy, end customer satisfaction is paramount. Therefore, most organizations with a distributed and mature channel deploy deal registration software to protect specific deals for specific partners.

This eliminates a potential waste of resources. More importantly, it increases satisfaction among both customers and partners. In this article, we will explore a few ways a deal registration software can be deployed.

Before an organization deploys deal registration software, it is essential they identify the specific criteria required for deal registration. These criteria may focus selected business verticals, partner specialization aligned with those verticals, deal value, and the total number of deals or distribution of deals in specific geographical locations.

In addition to setting such parameters, the vendor also needs to think through the deal registration process itself. For example, if the organization has a direct sales force but also sells through the channel, then it is essential to determine who will have preference based on specific criteria.

Sometimes channel partners will pursue certain prospects, only to learn the vendor's direct sales force has taken a specific deal away. Once this happens, partners may not only complain about a conflict with the direct sales force, but also may actually stop selling certain products and services into a specific segment or to the overall market place. Therefore, it is essential for organizations that have a direct sales force but also sell through the channel to clearly identify on what basis a deal may be protected either for the direct sales force or for a partner.

In some cases, a deal may also have to be reviewed by multiple individuals within the organization who have the power to approve or reject a specific deal. This escalation process may

be a function of deal size, deal complexity, requirements for additional resources, special prices, a special bundling request, or perhaps post-sales support and training. Again, in order for deal registration software to fulfill its purpose, the organization must clearly define the escalation process before implementation.

Once market parameters, partner criteria, deal protection logic and the review process have been clearly defined, this information should be communicated to both internal and external stake holders – including all partners. This process needs to be completed transparent, and the organization will need to ensure both internal and external staff are fully trained. A partner organization may have to be properly incentivized, provided with appropriate training and monitored for adherence to the overall program.

In some cases, a deal registration program may evolve over time or may change on a bi-annual or an annual basis, or when certain new products are launched or acquisitions are made. In these scenarios, the deal registration software will have to be dynamic enough to address special business needs both in short- and long-term frameworks. Remember, the goal of automation is always to reduce friction between the vendor and the partner and make it easier to do business by making the entire process transparent, repeatable and reproducible.

Finally, properly designed and deployed deal registration software can also provide an array of analytical measures to

show both the vendor and its partners how well the entire program is working. By addressing what is not working, and properly reconfiguring the deal registration program, process and software, an organization can remain flexible and dynamic, and stay relevant to its own business needs as well as the needs of its partners.

Because it can address core business needs and partner interests in a highly dynamic and realistic way, properly configured deal registration software is a great tool for increasing partner performance and satisfaction.

“ The goal of automation is always to reduce friction between the vendor and the partner and make it easier to do business by making the entire process transparent, repeatable and reproducible. ”





### 3 The Right Deal Registration Program Can Boost Your Channel Sales

If you are selling through the channel, then chances are you have a deal registration program or are considering one. The rationale for putting together such a program is basically two-fold. First, drive accountability, visibility and predictability from the partner base to own a set of opportunities and close them. Second, protect the end customer (buyer) from being pursued by too many channel partners for a specific opportunity. However, in addition to these two primary reasons, there are multiple other factors that make deal registration important.

In most cases, the intent of deal registration is to reward specific partners who are pursuing a business opportunity in a focused way, and prevent any potential conflicts with other channel partners and the vendor's internal direct sales force when it comes to that pursuit. However, despite this simple and focused objective, deal registration programs often fail to work properly—and when they don't work properly, they really can't have any positive impact on sales.

In an earlier article I discussed how deal registration can drive partner satisfaction, so I won't belabor that point here. However, I do want to discuss briefly a few factors that can seriously impact—in a positive way—channel sales. These are tied to the following areas:

- 1. New product launches** – Instead of rolling out a specific new product or service for the entire channel, you may want to pick a specific geography or a group of partners selected for certain opportunities. While your mass marketing engine may be driving leads from all of over the place, when it comes to closure you may want to distribute those leads to a specific set of partners to pursue, and make sure when they do so their efforts are protected via deal registration programs.
- 2. New customer acquisition** – Perhaps you are trying to expand your current customer base and incentivize

your partner base to bring in new accounts. In those cases, if a partner brings in a new account from their existing installed base, you very likely have to protect those relationships for a certain period of time via your deal registration program. In fact, it may make sense to broaden that from deal registration to an account registration program. It is essential to build trust with partners who bring you new accounts and ensure they are not threatened by the possibility of losing their installed base to another channel partner.

- 3. Existing product sales boost** – Sometimes your flagship products or services may be floundering because your partner base has lost its focus and is trying to do too many things. We all know that it happens from time to time. In response, you may want to bring focus back to your core products and services by providing extra margin or training or some other incentive mechanisms. As a part of that effort, you can provide partners that bring in deals above a certain size or contract duration with extra points or some other kind of reward. This kind of incentive can light a fire under partners and generate big deals—provided that the partners know your true intent.

examples of how a deal registration program can incentivize partners to sell more when the programs are thought through. In addition to providing protection to partners when they bring opportunities and end buyers from multiple partners pursuing the same deal, a properly designed deal registration program can truly align a partner's business interest with your own organization's interest to boost sales via channel.

“ You can provide partners that bring in deals above a certain size or contract duration with extra points or some other kind of reward. This kind of incentive can light a fire under partners and generate big deals—provided that the partners know your true intent. ”

I could keep going and discuss various other aspects of deal registration programs, and I will do that in subsequent articles, but here I just wanted to take a moment to share three simple





## 4 3 Things Your Deal Registration Program Must Have

**M**ost organizations selling through the channel do not have a deal registration program. Whether you already have one or you don't but are considering one, this article is written for you. Across multiple organizations, regions and verticals, we have consistently observed that vendors with successful deal registration pay close attention to a few key elements. In this article, I will summarize the three core elements that a deal registration program must be designed around to deliver for success.

Before we begin though, let's discuss what a deal registration program is for. Typically, a deal registration program is rolled out to ensure that a specific partner who is selling to the end customer—and has put in a lot of effort in building that opportunity to near-closure—doesn't lose the sale at the last minute to another partner who walks in and scoops up the deal with lower pricing or via some other mechanism. A deal registration program is also designed to protect channel partners from competition with the vendor's direct sales force in cases where the vendor organization combines direct and indirect sales in its go-to-market model.

Now with the basics of deal registration program behind us, let's focus on the core factors that need to be thought through and protected:

“*Designing an effective deal registration program is no big mystery. Making a deal registration program successful is really a matter of aligning the capabilities and interests of all of the involved parties with program details. Spend some time figuring out the sequence of the registration process.*”

**1. Begin with the partner in mind** – It is useless to have a deal registration program that in the end doesn't make the partner win. Many organizations roll out a deal registration program just for the sake of having one, but then they fail to think through how a partner's business needs should be protected. For example, the protection might extend beyond simply protecting the deal to providing a higher margin, if a partner is able to attach other products and services. The entire focus for your deal registration program should be on protecting your partners' investment and increasing their profitability. This focus is critical for a successful deal registration program.

**2. The end user's needs always come up in the end** – In addition to designing your deal registration program with your partner's business interest in mind, you also must make sure the program creates value for the end-customer who is ultimately going to carry out the transaction. When you lock out a deal on behalf of a specific partner, you need to make sure through the deal qualification and registration process that the partner is actually qualified and has the capabilities to truly satisfy the end user's needs around your products and services.

If your deal registration program blocks other qualified partners out, but ends up selecting a less-capable partner, the result may be end-user dissatisfaction and even loss of the sale. This registering a deal scenario is tricky to

manage, and it must be handled carefully by the vendor, who will need to have a good understanding of the capabilities of individual partners.

**3. You need to make money too** –The entire reason for you to put a deal registration program in place is to sell more through a broadly distributed channel in the most effective way. While you have to think through the needs of your partners and end-users, you also have to be certain the deal registration program protects those partners who are most vested with you. Providing preferential treatment to partners that are more inclined to support your business goals is not only ethical but also makes common business sense. The key here is to be transparent about it by clearly stating the criteria you use for providing protection to a certain partner over another. If you follow these guidelines, however, you will see magic happen in your channel.

As you can see from this outline, registering a deal is not rocket science and designing an effective deal registration program is no big mystery. Making a deal registration program successful is really a matter of aligning the capabilities and interests of all of the involved parties with program details. Spend some time figuring out the sequence of the registration process. Identify priorities and pay attention to nuances in each area of the program to make sure you put the partner first, carefully consider the needs of the end-user and protect your own business interests.





## 5 5 Questions to Ask When You Set Up Deal Registration Software

Sometimes organizations that are selling through an overdistributed channel or that have an internal direct sales force are required to deploy deal registration software to protect deals or provide exclusive opportunities for specific partners who have already worked to develop those opportunities. However, if deal registration is not handled properly, it can cause significant channel conflict, partner dissatisfaction and even in some cases legal liability related to privacy and financial losses incurred by a partner. Therefore, it is critical for a vendor to think through the details of deal registration thoroughly prior to deploying deal registration software.

In this article, we will explore a few challenges associated with deploying deal registration software, and identify key questions that need to be asked in order to clearly define a successful deployment approach. Before we go further, though, let's step back for a moment and define the primary purpose of deal registration software and explore how it typically works.

There are two primary scenarios where deal registration software needs to be deployed:

- 1. In the first scenario**, either a vendor-led lead or opportunity has been created and is handed over to a channel partner for closure, or a partner-led opportunity requires protection from other partners who might be in a position to poach that opportunity. In both cases, we are going to assume that there is no competition between partners and the vendor's internal sales team, and that the partner doesn't have any other potential conflict with the organizational sales force. In this case the primary purpose of the deal registration software would be to protect the deal from another partner.
- 2. In the second scenario**, a partner is generating an opportunity and the deal requires protection from a vendor's internal direct sales organization. This is where things can sometimes get a bit tricky and murky. To

“If the transaction value is high regardless of volume, these deals may require protection, assuming the partner needs to invest significant resources to close such opportunities.”

avoid this situation, vendors need to define clear channel policies prior to the deployment of any deal registration software. If a vendor doesn't have a clear-cut policy designed to prevent channel conflict for a specific set of opportunities, and instead leaves it to organizational interpretation, then there could be a major issue down the road.

While there are several other less common scenarios that a vendor may need to think through before deploying deal registration software, let's focus on these two for now and consider a few questions that need to be answered before the vendor is ready to define a clear deployment approach for deal registration software.

Here are five key questions:

### 1. What types of products might require deal registration and why?

While this may sound like a rhetorical question, the key is to make sure when a vendor provides protection for a deal, the rationale behind the protection acknowledges





that the closing of the opportunity requires significant investment from the partner side.

If the transaction volume is high and the value of individual transactions is relatively low, then it wouldn't make sense to protect these deals. However, if the transaction value is high regardless of volume, these deals may require protection, assuming the partner needs to invest significant resources to close such opportunities.

## 2. How will partners be selected as a part of the deal protection program?

While it is not only noble for a vendor to deploy deal registration software to provide protection to a partner and his/her pipeline, it is also important to make sure only capable partners are rewarded with such protection.

At the end of the day the goal is to close as many transactions as possible at the lowest possible cost, without creating any partner satisfaction issues or crossing any ethical boundaries. However, it is also completely logical to deploy deal registration software and define clearly the threshold a partner must reach regarding annual sales volume, technical certification, geographical coverage or other parameters to be eligible for deal protection.

## 3. Will deal registration include named, open or hybrid account management?

This is a very important question to answer before any deal registration software can be deployed and configured properly. "Named" accounts are specific accounts that are assigned to a specific partner. "Open" accounts are accounts that are not protected, and all partners can pursue those end-user accounts for business on a vendor's behalf.

Typically any named account is reserved for partners with higher level capabilities and commitment to a vendor's solution. Therefore, if a vendor decides to proceed with the named account approach for its deal registration software, it is essential that the vendor think through the implications of this decision. Again, in the end the goal is to achieve a higher volume of transactions at the lowest possible cost while also providing maximum partner satisfaction. All three variables need to be addressed and maximized.

## 4. What is the approval mechanism for the review and escalation of issues?

State-of-the-art deal registration software like ZINFI's partner relationship management (PRM) solution can

certainly help a vendor automate named, open account or hybrid deal registration processes. However, in order to manage real-life scenarios, certain manual interventions will sometimes be required to ensure compliance.

While most of the deal registration workflow can be automated to reduce labor content and improve trackability and accountability, the decision flow needs to be mapped so that cross-functional team members from field marketing, channel sales management, partner business management, etc. can regularly review both process efficacy and performance output in a systematic and objective manner.

## 5. What are the key measures of success for a deal registration program?

Too often a vendor gets pulled into the technical nuts and bolts of a deal registration program or deal registration software. However, before complex workflows are automated with significant resource investment and over a period of time, a vendor must clearly answer this foundational question: What is the measure of success for this deal registration program?

A typical measurement of success is higher deal closure at a lower transaction cost, but it may also involve increases in partner loyalty and satisfaction, and healthy competition among partners. In any case, if success metrics are not properly defined, tracked and managed, it can easily lead to an explosion of scope that may confuse and frustrate participants and not yield significant results.

“ The software needs to be configured properly, but the most important requirement of deploying such a program has to be met before configuration. You need to think through at a macro level what products should be protected and how, what partners should be considered as a part of such a program, how open and named accounts should be managed, how approval will be handled and how success will be measured. ”

As you can see, there are many intricacies to setting up an effective deal registration program. Yes, the software needs to be configured properly, but the most important requirement of deploying such a program has to be met before configuration. You need to think through at a macro level what products should be protected and how, what partners should be considered as a part of such a program, how open and named accounts should be managed, how approval will be handled and how success will be measured.

Once a vendor has thought through and answered these five questions in a logical fashion, then the organization is ready to deploy the deal registration software and drive the program with clear business benefits and results.





## 6 Why Most Deal Registration Programs Don't Work

**M**ost technology vendors selling through a network of channel partners tend to turn to deal registration programs to streamline their go-to-market motions. They also leverage such programs to incentivize the partner base and increase sales productivity. However, the sad reality is that most deal registration programs actually do not work. Here are the reasons why.

- **First**, deal registration programs tend to be designed with the vendor's own business interests in mind, and are often focused on managing over-distribution, managing the sales mix and achieving pricing protection. However, when the design of such programs does not take into account the partner's business interest regarding profitability and sales productivity, it can create huge rifts in the vendor-partner relationship. It can also create a complete lack of trust in the vendor's deal registration program and, therefore, a lack of adoption.
- **Second**, deal registration programs that focus on a short-term sales cycle often fail to establish the rapport with

partner sales reps that's necessary to build momentum and close deals, and thus minimizes the return for the partner base. Deal registration programs that are campaign-specific rather than structural or systemic in nature across a set of product portfolios typically fail to achieve traction with the partner base.

“ *The best way to make deal registration work is to start with the end objective in mind. It's not about the vendor's own goals, but the partner's ability to sell without facing unfair competition and make decent margins from their efforts.* ”

- **Third**, deal registration programs that do not explicitly tout the benefits of participation from a partner perspective, and are perceived more like a black-box mystery by the partner base, tend to lack relevance to the partners they are supposed to incentivize. The best way to overcome such a challenge is to clearly show to the partner base that the partners who register deals actually have demonstrably higher sales productivity as well as higher profitability.

There are plenty of additional reasons for the lack of adoption in deal registration programs, including failures to establish clarity of purpose, communicate frequently with the partner base and align programs with appropriate incentives. But the key point here is that deal registration programs that are not designed with partners' core business interests in mind—and particularly their interest in closing more deals at a lower cost and higher margin—are likely to fail. Fear is not an effective motivating factor and ultimately fails to control a vendor-partner relationship, which is highly complex in nature.

The best way to make deal registration work is to start with the end objective in mind. It's not about the vendor's own goals, but the partner's ability to sell without facing unfair competition and make decent margins from their efforts. If a partner sees clear

policies that are being pursued by the vendor that are fair and that level the playing field, then will be much more likely to trust in the vendor's ability to successfully deploy such programs. Once that happens, the next key question partners tend to ask is, How long will the program last? That's why many deal registration program must remain in place at least for a year, if not more, before they are changed and tied to new product launches, acquisitions and other initiatives.

Finally, vendors must regularly share success stories related to deal registration programs and celebrate partner achievements by calling attention to participating partners' gains in profitability and productivity. As I hinted at earlier, the carrot-based approach is much better than stick-based approach in the channel. Nothing builds confidence and thereby drives adoption like stories of partner success. Vendors can't control their partners' go-to-market intent and motion by resorting to measures like threatening to lower a partner's medallion status or take away other incentives. This simply doesn't work. However, when a deal registration program is clearly tied to higher profitability and aligned with streamlined partner sales rep enablement activities and marketing programs, partners will take note and be motivated. They will see a deal registration program with legs—a program that is here to stay and is designed primarily with their interests in mind.





## 7 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 four core sub-processes:

- **Affiliate Marketing Management (AMM):** Affiliates are your partners who focus primarily on promoting your brand to their audiences using a variety of tactics. In return, you pay them commissions for driving traffic to your website. With our affiliate marketing management (AMM) solution, you can ensure you recruit the right partners and enable them to promote your products and services through their network. As your affiliates drive targeted traffic to your website, you track their performance, pay them commissions and grow your network.
- **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 operational 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 prospects and customer base 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 Incentives Management (PIM):** Rewarding your partners for channel program activities is critical for success. The Incentives Management module allows you to automate your incentive programs – including market development funds, rewards, rebates, commissions and more – across the entire partner journey. Reward high-performing partners and incentivize high-potential partners to perform better.

## Core Modules Overview



### Mobile Ready Application

The Mobile module comes with a set of mobile apps that are available for both iOS and Android platforms. Administrators can define which applications are available via mobile app, and which users have the access rights via mobile.



### Alerts & Notification Management

The Alerts & Notifications 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 (and engine) 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 and work flow logics, alerts, 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 – prospects, accounts, contacts, performance data, etc. Using this module, organizations can segment partners effectively into groups with various parameters for optimized management.



### Identify and Access Management (IAM)

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



### Enterprise Change Management

Enterprise Change Management keeps track of all changes made to the portal related to groups, users, content, workflows, and more. This is essential not only for audit purposes, but also for reversing changes that have been made unintentionally or intentionally.



### Business Intelligence Reports

The Business Intelligence Reports module provides a wide range of default reports, as well as tools for editing & creating custom reports. This provides insights into what's working and what needs improving in channel performance and programs at local and global levels.



### Centralized Interconnection (CENTRi™) Management

The Centralized Interconnection (CENTRi™) 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 via group upload using Excel or third-party SSO.

## Expanded Modules Overview



### 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.



### Co-Branded Assets Management

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



### Products Details Management

With the Products module, organizations can upload a variety of product-related content for use in both marketing and sales assets and activities. This module can also be used in conjunction with Configure Price Quote (CPQ) and Deal Registration.



### Communicate To Partners Management

The Communicate module comes with a cluster of marketing tools, such as email, microsities, 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.



### 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 as a standalone module.



### 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 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.



### 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.



### Exchange Management

With the Exchange module, an organization can list a set of service providers for marketing, sales and other technical assistance for partners. Partner users can procure these pre-selected third-party vendors and pay for their services using MDF or their own funds.



### Projects & Tasks Management

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

## Affiliate Marketing Management (AMM)

### Modules Overview



### Marketplace Management

The Marketplace module enables an organization to create a thriving marketplace for its partners to sell its products and services to each other and to end-buyers in a private, invitation-only experience.



### Promotion Management

ZINFI's Promotion Management module makes it easy for your affiliate marketing partners to promote content and products by leveraging UTM links and placing them on their website. Our UTM links tracker automatically documents which partners are generating which referrals.



### Referral Management

Enable your affiliate partners to register referrals manually or automatically via link and advertising referrals. Automatically map each referral to a specific commission payment structure for both marketing and sales activities. Set up business rules to route referrals for automatic or manual approval flow.



### Payment Management

Allow your affiliate partners to set up company and tax information to receive digital payments for their earned commissions. You can also enable partners to claim commissions manually or automatically for payments, and run performance analytics.

# Partner Relationship Management (PRM)

## Modules Overview



### 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.



### 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.



### Partner Business Plans Management

With the Partner Business Plans Management module, organizations can develop business plans by working with internal and external partner stakeholders to ensure plan execution and compliance.



### 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 automates 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.



### Deals Registration Management

The Deals module provides setup for deal registration criteria and workflows for an organization's partner base using UCM's FlexiFlow™ and CENTRI™ modules. Workflows can be very simple or can cover complex, comprehensive deal registration processes.



### 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.

# 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.



### Social Syndication Management

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



### Direct Mail Marketing Management

With the Direct Mail module, organizations can create 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.



### Email Marketing Management

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



### Microsite & Landing Page Management

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



### 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.



### 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.



### Multi-Touch Campaign 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 Incentives Management (PIM)

## Modules Overview



### Commissions Management

Both internal channel teams and external partners can use the Commission model to align with quarterly programs, campaigns and run rate business to provide sales or referral-based commission tracking. Users can set up business logic with UCM's FlexiFlow™ module.



### Sales Rewards Management

Sales Rewards allows setup of channel sales programs for internal and external users and progress tracking in a unified interface. This module also allows filing of reward claims and stack ranking status. The logic is built with UCM's FlexiFlow™ module.



### Market Development Funds (MDF) Management

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



### Rebates Management

With Rebates, organizations can set up company rebates based on specified performance targets and business rules. This makes it easy to develop an application process for partners to establish eligibility for rebate programs and for claiming rebates.



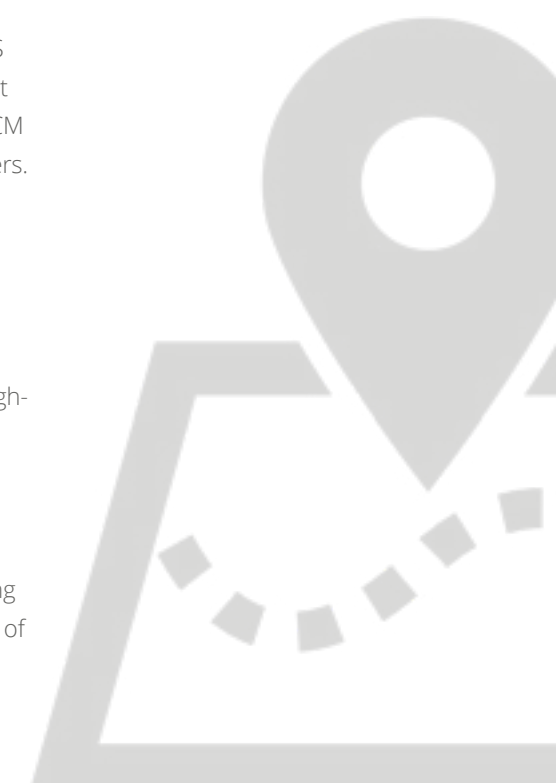
## About ZINFI

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.





[www.zinfi.com](http://www.zinfi.com)

## Contact Us

### AMERICAS

[sales.noram@zinfitech.com](mailto: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](mailto:sales.emea@zinfitech.com)  
Davidson House  
Forbury Square, Reading  
RG1 3EU, United Kingdom

### ASIA PACIFIC

[sales.apj@zinfitech.com](mailto:sales.apj@zinfitech.com)  
3 Temasek Avenue  
#21-00 Centennial Tower  
Singapore 039190