



# Partner Marketing Management Best Practices Guide



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# A Letter from the CEO

The Leader in Unified Channel Management



Dear Channel Professional:

Thank you for picking up this booklet on partner marketing management (PMM) best practices. We at ZINFI have been privileged 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 those lessons learned for successful partner marketing management.

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, most companies today trying to implement a unified approach to their channel management

struggle to make it work and get a decent ROI. In order to build a high performing channel, it is essential to optimize channel management end-to-end. ZINFI's vision is to enable our customers to optimize their channel end-to-end via our Unified Channel Management (UCM) platform.

A Unified Channel Management (UCM) platform consists of four core sets of processes:

- 1. Affiliate Marketing Management (AMM):** Recruit, engage, enable and reward your affiliate partners to extend your brand's reach at a fraction of your direct marketing and sales costs in both business-to-business and business-consumer segments.
- 2. Partner Relationship Management (PRM):** Ensure the interaction between your organization and your partners is fully optimized and your true channel potential is achieved by aligning training, programs and incentives.
- 3. Partner Marketing Management (PMM):** Enable partners 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.
- 4. Partner Incentives Management (PIM):** Develop programs (activities and initiatives) that align with your channel marketing and sales goals, and then execute via your partner network by rewarding partners to deliver better performance and ROI.

Development, roll-out and optimization of these four core sub-processes (AMM, PRM, PMM and PIM) 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 focuses primarily on various aspect of PRM, with emphasis on partner portal management, lead management and incentives management. We encourage you to go through the various best practices articles; we hope you will walk away with practical ideas that you can start implementing today to make a sustainable difference in your organization.

Recognizing the value of a true Unified Channel Management framework always starts with a solid foundation of PRM capabilities for your channel programs. As always, if you need help, have any questions or need more information, don't hesitate to contact us anytime.

Cheers!

Sugata Sanyal  
Founder and CEO





## How This Book Is Organized

This booklet is divided into five sections, Sections I & II cover an introduction and an overview of Unified Channel Management.

Section III is focused on the best practices for selecting and implementing a successful channel marketing automation platform and program. It will cover various aspects of how it has evolved over the years, and what you need to do to empower your country teams to leverage channel marketing automation.

Section IV explores the next generation of partner portal and the marketing tactics that will be necessary for you to properly arm your channel partners. Each marketing tactic that has been selected for discussion has shown that it will be an integral part of the marketing landscape in the coming year and beyond.

Section V is about the capabilities and services ZINFI offer and how they can help you to build a high performing channel on a world-wide basis.

The lessons and best practices in this booklet are based on years of intensive efforts creating and deploying sophisticated channel marketing automation systems as well as ongoing discussions with our customers as we strive to understand their evolving challenges and requirements.

Whether you read each section and chapter in sequence or skip around as your particular interests, we think there is a wealth of information here that even the most experienced channel marketer can learn from.

Enjoy!



## 1

## Redefining Channel Management Through A Unified Lens

**W**e've already explored in multiple earlier articles the complexity of channel management. 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've also written about how 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 of all, 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.

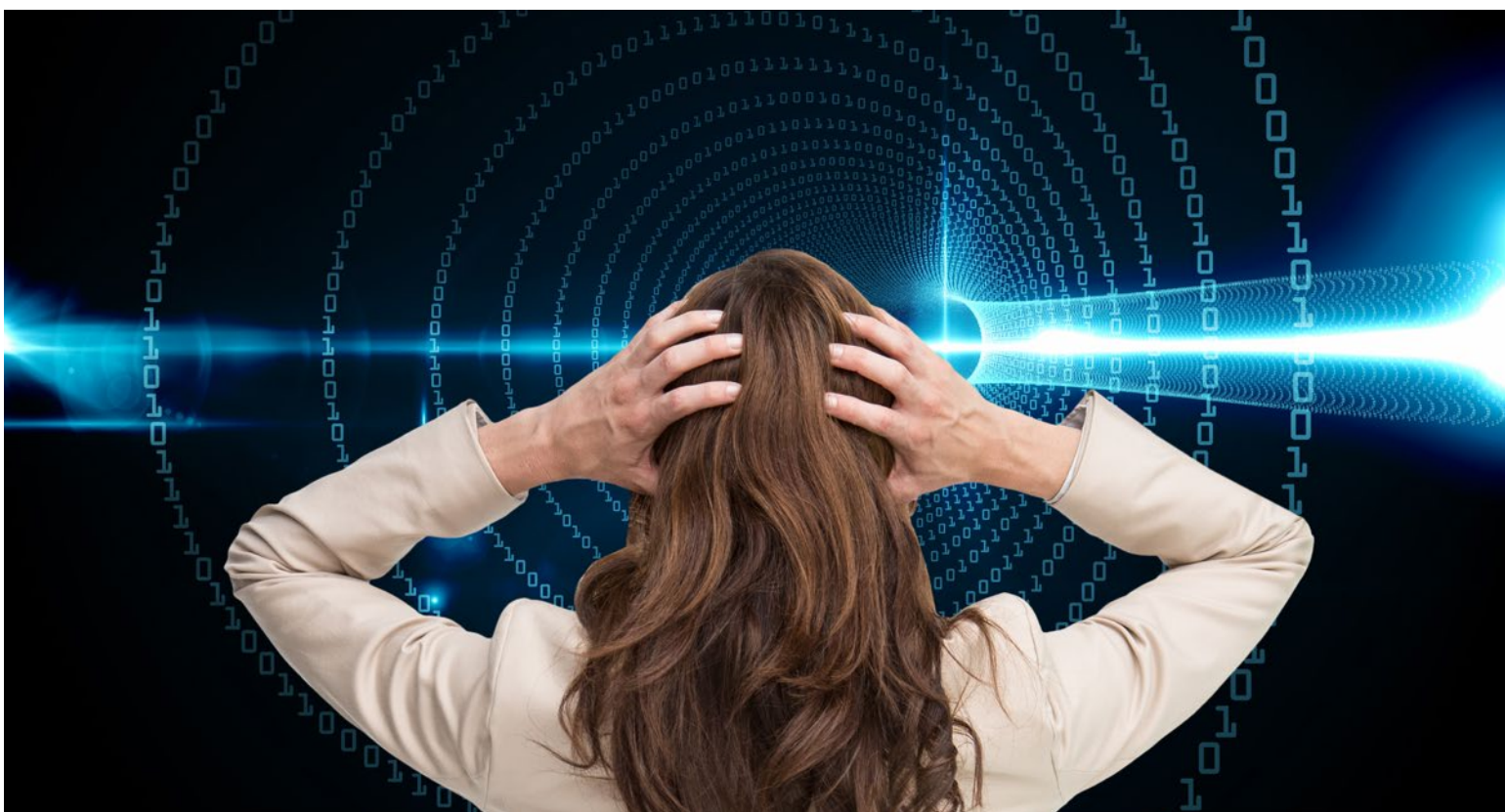
So, I hope you can begin to see that one of the most important steps in establishing a unified approach to channel management is to take a broad, longer-term view. “Rome was not built in a day” may be a cliché, but it expresses a particularly apt principle for channel management. To be truly successful 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

“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”

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 mechanisms 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. Channel 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 channel 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.





## 2

## How to Make Unified Channel Management a Reality

**T**here is no doubt that channel management is complex. (For more on this, see our previous posts, 5 Myths of Channel Management and Challenges of Channel Management.) 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 actually consist of a hodgepodge of diverse systems that have evolved over a long period of time. As a result 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. As a result of that—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

**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.

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.

A final, and very important, area of concern is partner incentives management. 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.

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.

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 understanding of what type of DNA an organization should be looking for when they are trying to recruit new

“ *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. The primary reason for this is a lack of available end-to-end system that can readily adapt to each organization's unique needs.* ”

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.





### 3

## Evolution of Channel Marketing Software

Over the past three decades, the channel has become a very important way for many companies to reach end users, whether they are business buyers or consumers. Whether you're talking about retail or professional channels, the channel is here to stay. However, with globalization, and with products being manufactured in one country and being sold in another, channel marketing has become quite complex. Luckily, over the past couple of decades with the evolution of the Internet, and especially over the last 10 years with the evolution of the cloud, things are really coming together when it comes to channel marketing. A whole new category of channel marketing software is evolving that allows vendors throughout the channel to implement true end-to-end marketing and provide productivity and growth at a much lower cost than before.

### A very brief history of channel marketing software

Let's take a step back for a moment and look at the history of channel marketing software. When computers hit the market

and became a staple tool in most businesses in the 80s, most companies managed their channels with some very basic tools like Lotus 1-2-3 or VisiCalc or some other spreadsheet program. Prior to that, of course, everything was manual, but some level of automation began to emerge and people began to use it to keep track of rebates, rewards, incentives, various types of sales activities and so on using spreadsheets. That was the first level of evolution.

When products like Adobe and other creative software suites became available, companies were using and designing marketing collateral that partners could co-brand and make available to customers. Gradually, with the advent of the Internet, the partner portal emerged and soon became an important channel marketing software tool, even though it had very limited capabilities and was used primarily for data warehousing. Nonetheless, the partner portal became a foundation on which today's channel marketing software is still building.



## Niche use cases, vertical-focused tools

So if you look at the current state of things, today's channel marketing software consists primarily of marketing tools that vendors make available to multiple partners in various countries. Through these tools, the vendors try to communicate with their end-users, generate demand and manage relations. That has become the primary focus of channel marketing software. There are multiple players today who provide various sorts of channel marketing software and tools to vendor organizations. Most of these tools are focused on certain verticals. Whether they are technology-centric, consumer-centric, manufacturing-centric or insurance-centric, their origins are generally based on the industry background of their founders, and therefore on a particular kind of organizational knowledge for a specific industry. As a result of that fact, a lot of today's channel marketing software tends to address niche use cases that are specific to one vertical or another.

Based on information from industry analysts like Forrester, SiriusDecisions and others, there are now a couple dozen channel marketing software providers that collectively cover multiple industry segments. However, there is no single specific vendor that covers all use cases. We have also seen an extension of channel marketing software from marketing to productivity management activities, and therefore a whole category of partner relationship management has evolved from that. Some vendors, like ZINFI, provide both—partner relationship management as well as channel marketing automation—which are offered through an integrated software platform. At ZINFI we call it Unified Channel Management™.

## The future is bright: reduced pricing, broader adoption, better integration, cross-pollination

So when we think about the future of channel marketing—as use cases from various verticals start to overlap and as channel marketing software products mature in specific segments and can be extended to other segments—we will see the emergence of more multi-segment providers. This is good for buyers and users. We will see cross-pollination of marketing ideas whereby marketers can learn from one industry vertical and apply those techniques to another. This is part of the ongoing evolution channel marketing software. We will also see a significant reduction in costs powered by ease of use at the product level and by reduction in cloud

infrastructure costs, and the increased affordability will drive broader adoption and substantially increase the market space.

## The importance of phased implementation

We continue to see among the customers we serve that adoption of channel marketing software in today's marketplace happens in multiple phases, and we sincerely expect this to remain the case for some time to come. In other articles, we have pointed out the adoption of channel marketing software is directly linked to a company's channel programs and the maturity of those programs. Organizations that have more mature channel programs tend to have a better deployment experience with their channel marketing software, exemplified by better organizational buy-in, more and better engagement with partners, appropriate partner marketing concierge investment, and so on.

However, if organizations with less mature channel programs overinvest in channel marketing software, it can turn out to be a big waste of money and severely complicate their go-to-market approaches. Therefore, at ZINFI we always recommend to our customers to implement channel marketing software in phases. The first phase is making sure that the channel partners are provided with a basic set of tools for marketing. This could be as simple as offering social syndication and web syndication tools. Once that's accomplished, most partners—especially in segments where solutions are sold—tend to rely quite a bit on events, so event marketing becomes another important channel marketing software feature. Then, as the channel marketing program matures further, the channel marketing software should be able to start automating incentives management in the areas of market development funds, rewards, rebates, etc.

At we look to the future, we at ZINFI believe in this evolutionary vision of channel marketing software—and it's a vision we are actively working to create—where the entire spectrum of channel management becomes unified. When it comes to market-to-partner, market-with-partner or market-through-partner activities, the entire category of channel marketing software has evolved from a very basic level of discrete marketing activities to a unified approach where partner relationship management, channel marketing automation and channel sales enablement all fit together in a single unified solution that vendors can deploy sequentially—not only to drive revenue, but also to reduce costs and drive scalability and uniformity across channel programs globally.



# 4

## Channel Marketing Automation Software – Why The Rapid Emergence?

As the world gets more and more digitized, and technology touches every aspect of our lives, one evolution that is consistent across all segments of lives is software driven automation of work steps. Whether it's in the connected home or connected work place or intelligent manufacturing processes or financial management, business automation is here to stay, and will only increase with time. Within this fundamental change the most recent evolution has been in the area of automated channel marketing software.

So why is the category of channel marketing software growing and why is it needed? And, who should consider deploying it? Before we answer these questions in detail, let's look at the underlying factors that are driving the evolution of this new category.

Over the past two decades, the Internet has become not only a medium for content distribution, but also a utility that – just like electricity, water, air conditioning or heating – keeps an organization running. Today the Internet is a utility that allows businesses to distribute content and people to communicate,

but it also has become a medium for distributing software that automates business workflow. Software that used to run on our desktop, gradually moved to centralized servers and, over the past decade, outside the organization to the cloud. This trend accelerated due to the abundance of bandwidth and storage and the evolution of web services platforms that can run software in the cloud, eliminating the need to install programs onsite.

A brief summary of the evolution of enterprise automation software looks like this:

**1. Phase 1 (Broad Enterprise Automation)**– The first category of enterprise automation software has been in the area of Enterprise Resource Planning (ERP), which included Customer Relationship Management (CRM), Manufacturing Resource Management, Financial Resource Management, etc. This is where companies like SAP, Microsoft, Oracle and IBM have created technologies, and continue to dominate end-to-end automation and management of business processes. In this phase we also saw the evolution of Business Intelligence software that pulls data together from multiple systems to

give a holistic view of the enterprise, with the goal here of enabling data-driven management decision-making and resource allocation.

## 2. Phase 2 (More Deeper and More Specialized Tools)–

During the past decade, we have seen the evolution of marketing automation software designed for the mid-market and enterprise space from players like Eloqua (acquired by Oracle), Pardot and ExactTarget (both acquired by Salesforce.com), Marketo, Hubspot, Act-On Software and many more. Most of these organizations today boast multi-billion valuations representing the future potential of growth in their respective segments. There also has been innovation in small business marketing automation areas – driven by players like

*“Today the Internet is a utility that allows businesses to distribute content and people to communicate, but it also has become a medium for distributing software that automates business workflow. Software that used to run on our desktop, gradually moved to centralized servers and, over the past decade, outside the organization to the cloud.”*

ConstantContact and Vertical Response. As a result, it is now accepted that when it comes to core business processes like sales, marketing, manufacturing and finance, automation is critical not only to reduce cost, increase repeatability and reproducibility, but also to create competitive advantage against other players in the market place.

Amazon is first a software company, and secondarily a reseller of products and services. We have seen business like bookstores – for example Borders in the U.S. – going out of business, simply because they did not compete in the arena of digitized content and distribution of goods and services via Internet process automation. The same thing is happening with all companies that are not adopting digital sales and marketing processes using end-to-end automation, and the same logic applies to the

recent evolution of automated channel marketing software. If you are selling direct, the chances are you have already automated your sales and marketing processes, or are in the process of doing so. Otherwise you risk going out of business, just like old-school bookstores. However, if you are selling indirect, through a channel, it's possible that you may have not considered automation yet, simply because it is a new and rapidly evolving segment.

So what is the state of the channel marketing automation software industry today, and where is it going? Here is a brief summary.

**1. Channel marketing automation software today–** There are thirty or more vendors – like ZINFI – who are turning over something in the range of \$5-10 million a year in revenue, focused on various aspects of channel marketing automation software. Some providers target their offerings at specific technology segments and automation of workflows related to the management of resellers, VARs, system integrators, or managed services. Some channel marketing automation software vendors are in the business of automating vertical industry segments like retail franchise, affiliate marketing, healthcare, insurance or real estate. However, all share broadly the same goal, which is to automate two or more tiers of marketing and sales processes via channel marketing automation software. This is something that older school direct marketing automation vendors do not do today.

**2. The future of channel marketing automation software–** Just as standalone products have become features over time in all other automation sectors, it is clear that most of the sub-segments discussed above will be absorbed into a single segment of multi-tier marketing and sales automation for different vertical market. This evolution represents the next phase of the channel marketing automation software segment, which we will discuss in a future article. How do we know it's coming? Well, we have already experienced the evolution of Unified Channel Management that basically now comprises Partner Relationship Management and Partner Marketing Management. These two distinct workflows now can be unified under one software platform and provide true end-to-end visibility, scalability and control to channel professionals.

Channel marketing automation software is at an exciting phase in its development. Even in its early days of evolution it already has produced significant cost savings through streamlining of process steps, elimination of wasted labor, and freeing up marketing and sales funds to invest into strategic growth areas. It will continue to do so on an even greater scale in the years to come.



## 5

## Must-Haves for Your Channel Marketing Platform

**W**ith the advent of the Software as a Service (SaaS) based marketing automation platforms, over the past few years we have seen the rapid evolution of several channel marketing platforms. However, before you make significant investments you should make sure that the channel marketing platform that you are consider can satisfy a set of several core and advanced requirements.

At ZINFI, we have coined the term Unified Channel Management (UCM) as a way to indicate the comprehensiveness of a channel marketing platform. Today, several acronyms are used by various analysts firms to describe basic categories under the channel marketing platform umbrella. Here are the basic definitions that are being used.

### a) Partner Relationship Management (PRM) –

This category primarily focuses on enabling a vendor selling through the channel to recruit, train and manage their partner base effectively. PRM tends to include applications like partner onboarding, partner training, deal registration, market-development funds, rewards, rebates, etc.

### b) Partner Marketing Management (PMM) –

The entire focus for this platform is to enable the partner run integrated campaigns to generate leads. Some analysts are calling this Through Channel Marketing Automation (TCMA) or Through Partner Marketing Automation (TPMA). However, both TCMA and TPMA refer to the same thing.

### c) Unified Channel Management (UCM) –

At ZINFI, we refer to the combination of PRM and PMM as

*“Your channel marketing platform should have a dynamic reporting and analytical engine allowing you to cut your data in multiple ways and understand what is working and what is not.”*



Unified Channel Management (UCM), since you need both set of capabilities to truly manage a channel end-to-end. When someone is referring to a channel marketing platform, they may be referring to UCM or components of UCM. However, the term channel marketing platform is now broadly used.

With the definitions behind us, it is important for us to understand what the core capabilities of a channel marketing platform are. In order to define the capabilities of a channel marketing platform within the context of an organizational channel maturity framework (please refer to our article on Channel Marketing Automation Can Increase Channel Management Maturity) it is important to break down the feature sets into three levels, from the most basic to the most complex:

### 1. Level 1 (starter capabilities) –

In this phase you need a set of capabilities that allow you to recruit, train and manage partners. Therefore, your channel marketing platform should have the following capabilities:

**a) Partner portal** – You should be able to share channel program content with your partners based on their type and location.

**b) Documents management** – You should be able to share data sheets, pricing information, program information, etc., through a downloadable interface for both PC and mobile platforms.

**c) Basic market-to capabilities** – You should be able to send emails and other communications to inform partners what you are doing with your programs.

### 2. Level 2 (advanced capabilities) –

If you are in this level, then your channel marketing platform should have the following core feature sets:

**a) Partner Profile Manager** – This is a CRM-like database where you would house all your partner records. However, the capabilities of a Partner Profile Manager (PPM) are more advanced than a basic CRM. The Partner Profile Manager (PPM) not only houses records, but also integrates with your training, certification and sales tracking tools to make sure you have comprehensive profiling capabilities.

**b) Deal registration** – As your channel starts to grow, your channel marketing platform should be able to address your need to protect the deals generated by your partners to minimize channel conflict. This is a core capability that your channel marketing platform must have. This capability should directly link not only to your Partner Profile Manager (PPM), but also to your existing CRM infrastructure so that you can seamlessly track how

your partners are performing.

**c) Advanced market-to capabilities** – In this level, your channel marketing platform should allow you to have advanced marketing capabilities – e.g., search, social, syndication and events. By using this tool, both your field marketing and channel sales teams should be able to effectively segment, profile and market to the partner base and keep track of their engagement to substantially increase program effectiveness.

**d) Advanced learning management** – The ability of a channel partner to effectively market and sell depends to a large extent on the partner's knowledge of the vendor's products and solutions. This is where Learning Management System (LMS) features come into play in your channel marketing platform. When you are evaluating a PRM platform, make sure the LMS capabilities match your requirements.

**e) Multi-partner demand gen** – Your channel marketing platform should give you the ability to completely set up co-branded campaigns for your partners to use and drive demand. This is incredibly important if you want to drive partner-led demand generation and want to equip your partners with state-of-the-art integrated campaign assets and tools.

### 3. Level 3 (mature capabilities) –

In this phase, you will need to make sure that you have true end-to-end channel management capability and that your channel marketing platform gives you comprehensive capabilities to manage your channel to its fullest potential

**a) Advanced portal capabilities** – You should be able to localize your content, promote the content via various means (such as search and social) and track effectiveness.

**b) Incentives management** – Your channel marketing platform should allow you to dynamically manage various aspects of your partner incentives program using market development funds, rewards, rebates, and other incentives.

In addition to these core capabilities, your channel marketing platform should have a dynamic reporting and analytical engine allowing you to cut your data in multiple ways and understand what is working and what is not. Channel marketing is complex, and it requires a balanced and integrated approach using programs, process, automation and people.

Now that you have a good sense of the core capabilities a channel marketing platform must have, please feel free to navigate through [www.zinfi.com](http://www.zinfi.com) or sign up for one of our deep-dive webinars if you want to learn more about how some of these capabilities can take your channel to a new, higher level of performance.



## 6

# Using Integrated Marketing Tools Effectively for Channel Marketing Automation

**M**any Channel Marketing Automation vendors today provide tools such as email marketing, event marketing, and web and social content syndication. However, it's questionable whether these tools are enough in themselves to stimulate demand and channel engagement. So what else is needed to complete the demand generation tool set, and how can a technology vendor make sure they buy the right system, and pay the right amount to achieve the desired ROI? These are important questions; moreover, for larger vendors they need to be considered in a global context.

First-generation Channel Marketing Automation tools typically offered web syndication, event marketing and email marketing. In the ensuing phase, most Channel Marketing Automation vendors – like ZINFI – introduced tools like social syndication and on-demand webinars. While these tools were somewhat effective in building sales pipeline, their impact was only moderate. In an effort to understand more, ZINFI last year undertook an extensive, in-depth channel partner survey, which has provided useful insights on the elements needed and changes necessary to drive higher utilization and better return from channel marketing automation platforms.

Time is a prime concern. Channel partners are tightly focused on sales and technical support and only in comparatively rare instances have dedicated marketing staff. So while vendors offer easy mechanisms to issue simple email blasts or implement pre-prepared web content syndication, they can't overcome the fact that the partners are busy – VERY busy – elsewhere. Most vendor tools are potentially useful, but not sufficiently so – they don't go far enough. Technology vendors therefore need to look at other ways to energize their partners to undertake marketing. One effective way is to provide a set of integrated tools that is not only easy to use but also preconfigured for various types of campaign.

Any effective demand generation platform must incorporate the following tools and functionality:

- 1. Lead Management-** While most Channel Marketing Automation platforms offer basic capabilities to upload leads (or records of potential prospects or existing customers) a true lead management platform needs to include a traditional customer relationship management (CRM)-like interface, for two main reasons:

“ Channel partners are tightly focused on sales and technical support and only in comparatively rare instances have dedicated marketing staff. So while vendors offer easy mechanisms to issue simple email blasts or implement pre-prepared web content syndication, they can't overcome the fact that the partners are busy – VERY busy – elsewhere. Most vendor tools are potentially useful, but not sufficiently so – they don't go far enough. Technology vendors therefore, need to look at other ways to energize their partners to undertake marketing. ”

- ▶ For ease of use, the lead management system needs to connect both to the technology vendor's and the partners' own CRM system in order to enable data to flow seamlessly back and forth

- ▶ Most partners today use a CRM system such as Salesforce.com, so providing them with a CRM-like interface for lead management will drive adoption faster.

**2. Lead distribution–** Most vendors provide leads to their top tier partners, but to build pipeline and promote best practices beyond this rarified level, it's critical to create a competitive environment for lead distribution. The Channel Marketing Automation tool must be able to distribute leads to pre-defined partner sets, whether to a small segment or to all partners, e.g. in a shark tank mode.

**3. Campaign-specific tools–** Not all tools are relevant for everything, so it's important to determine the purpose of each campaign. Social and search marketing are effective for awareness generation. Email, Events and Content

Syndication showcases are primarily used to generate engagement with prospects. Deep dive training or product usage videos work well for gauging trial interest and qualifying leads. Also, depending on the target segments – SMB, Mid-Market or Enterprise – one or more tools may be needed to make a campaign productive.

**4. Multi-touch campaigns–** Most mid-market and enterprise buying has a long evaluation cycle. In order to stay in the game – not just be included at the last stage for price comparison purposes – a Channel Marketing Automation platform should have multi-touch capabilities. This is essential to automate DRIP campaigns and provide successive content-driven engagement stages to move the buyer along their evaluation process.

**5. Dynamic reporting–** You need to be able to measure what you get, so if you cannot slice or dice the data from your campaigns in multiple ways you will not know – and your partners will not appreciate – what is really working in each campaign, and why some partners are more successful than others. So, comprehensive, end-to-end, dynamic reporting functionality is critical to enabling continuous improvement and remedial action.

**6. End user-facing sales tools–** Generating leads is the first hurdle, but the next is lies in closing the sale. Most vendors carry multiple products, and many of the end user facing marketing and sales tools, e.g., battle cards, case studies or pitch sheets, are scattered around in multiple places in the partner portal. Your Channel Marketing Automation platform should be able to consolidate all relevant information in one place within the campaign, allowing your channel partner to easily locate what they need to take a lead through its cycle as quickly and efficiently as possible.

**7. Making results count–** The platform you choose must be able to provide channel partner stack ranking – just as you do for your own direct sales force – to identify who is building the biggest pipeline and who is falling behind. Sales is a competitive sport, and a ranking system will stimulate efforts while promoting the capabilities of your lead management systems.

ZINFI's Partner Relationship Management (PRM) platform can provide you with an integrated Channel Marketing Automation tool that not only allows partners to reap the benefits of the relevant digital marketing tools, but also manages the demand generation process end to end, with minimal effort and maximum impact.



## 7

## 5 Ways to Use Channel Marketing Automation to Get Your Partners' Attention

**M**ost technology vendors struggle to keep their partners informed about product and program changes via their Channel Marketing Automation platform. This happens mostly when the vendor relies too heavily on Email Marketing based communication. While all Channel Marketing Automation tools provide Email Marketing as a core tool of communication, very few provide a set of alternative or supplementary communication tools, and this is a problem, because email is easy to ignore and ineffective as a single communications medium. ZINFI's Channel Marketing Automation platform provides realistic, alternative tools to bridge this gap.

An average channel partner with \$2 million to \$10 million in annual revenues will probably carry products from between six and forty technology vendors. Each vendor provides multiple products that go through product refresh, updates, and end of life announcements on a quarterly basis. On top of that

each channel program has multiple updates related to market development funds (MDF), rewards, rebates, training, etc. Multiply that by a factor of six, or – even worse – forty, and you can see that the stream of information will be excessive, confusing, and easily forgettable. If vendors try to communicate to channel partners via emails only, it becomes almost an impossible feat to create an informed channel. The average email open rate is only 10-15% for most email blasts to the channel. So what can be done? Here are 5 options:

- 1. Mobile Responsive Portal**– Almost all partners today live by their smart phones, and like any other business users they access a lot of information on their mobile devices. Therefore it makes sense for vendors to separate daily and weekly communications on to a web-based mobile platform, and encourage partners to bookmark that site on their handheld devices.



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**2. Mobile Applications–** It is relatively easy to develop branded mobile applications, but only if you have a structured way to push fresh content. Product and program related content can easily be sent to a mobile application, and this creates a secure way of pushing content to partners – including sales videos, product training, and program announcements. However, content segregation is the key for success via mobile devices. You only want to push relevant content to relevant partners – not everything to everyone.

**3. Social Communities–** Most vendors are engaged in social communities targeted towards channel partners; however, information is not often distributed through these communities in a strategic way and much content is pushed randomly. A better tactic is to create multiple communications streams for topics like sales, marketing, training, or products. While you cannot push confidential or sensitive information (such as special pricing) through a publicly available site, information can be provided in such a way that partners are alerted about changes, and can then log into a secure site (mobile friendly is recommended) to access more information.

**4. Mobile Video Portals–** If a picture is worth thousand words, a video is worth a million. Most partners very rarely in an office. So, while they are waiting in the lobby to meet a client, traveling, or taking a break from a partner training conference, they have multiple opportunities to watch three- to five-minute-long information videos. It’s a simple matter today to take and upload videos without needing special production facilities. Get a simple tripod for your smartphone and you are in business.

**5. Audio Podcasts–** The podcast has been around for years, but still fewer than a handful of vendors use them effectively. It’s incredibly easy to create three to five minutes of relevant audio podcasts and push them via social media or mobile portals. This allows you to get a lot of information out to a very wide audience with remarkable speed. Since most partners drive to work, the audio podcast is a highly effective way of distributing channel updates, product refresh information – and even pricing changes.

ZINFI’s Partner Relationship Management (PRM) platform– along with Email, Event & Microsite marketing – provides an alternative set of communication tools as described above and this enables Channel Marketing Automation to increase reach and engagement with channel partners.



## 8

## How to Empower Country Teams Using Channel Marketing Automation

The primary challenge for any reasonably large technology company with global presence, marketing in a business-to-business (B2B) channel environment, is making sure that marketing assets that are created centrally for global use can actually be deployed locally. Most companies would also like to see substantial content development and deployment at a country level to boost the local sales efforts. So, how do you do that in today's resource-constrained environment? This is where a global channel marketing automation platform and concierge services come in.

In today's resource constrained environment the constant focus is on greater accountability and ROI tracking from marketing investments. Traditionally, an army of marketing resources is needed not only to develop campaigns, but also to execute them and track results. Surprisingly, very few organizations take a structured approach to marketing and few apply marketing automation or, indeed, sufficient resources to their campaigns. As a result, they resort to running impromptu campaigns that are insufficiently strategized and coordinated to drive predictable results or report ROI on a central or global level. As a result, far too much channel marketing investment ends up being questioned.

And to complicate this further, lack of insight at global level into country-by-country activities leaves the last mile in a cloak of invisibility, where it's impossible to see whether content is touching prospects or customers via channel partners. This inability to monitor campaign results and ROI leads to further poor decisions regarding the future of campaigns: how can the marketing teams know which horizontal or broad-brush campaigns can be leveraged globally, and which are better suited to a vertical market approach (e.g. education or retail) that will need to be developed locally.

In fact, there is a relatively simple fix for this problem. The goal of loading global marketing assets and then allowing different countries to augment these with local content can be easily addressed with a well-structured and systematic channel marketing automation program. These are the core elements to look for:

- 1. Group and Role Management**— Your channel marketing automation platform should allow you to set up different groups, e.g., global, country or territory teams, as well as assign specific roles in the process to channel partners, channel marketing managers, distribution managers, or channel account managers.

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change the master copies and assets. The ability to copy existing material from a global library, and create a local content library is a must-have capability for your channel marketing automation platform

**2. Setting Access Rules–** The channel marketing automation platform should allow you to set access rules, i.e., define who can upload, edit, view and use content and campaigns for marketing activities.

**3. Assignment of Campaigns by Access Rights–** You should also be able to assign certain campaigns and assets to certain groups and roles. This graded access and rights management capability is critical for your channel marketing automation platform, because providing personalized campaign access significantly improves partner experience, creates greater control and better reporting.

**4. Content Localization–** Once you have uploaded global campaigns to the channel automation platform, your local country teams should be able to access this content to localize or customize it – without, of course, being able to

**5. Campaign Usage–** Your channel marketing automation platform should be able to track detailed usage reports that show who is accessing your global content, who is creating local campaigns, and how they are working. This knowledge can be applied in many ways, for example in ‘reverse engineering’ local campaigns. You might be able to take a successful local campaign and go global or regional with that material, with or without modification. Visibility into campaign usage is critical to drive better ROI both at a local and global level.

**6. Agency & Concierge Access –** Many large organizations use multiple third party agencies and marketing concierge services, so the channel marketing automation platform should be capable of allowing those external groups to access campaigns and content in a secure fashion.

**7. Dynamic Reporting–** In addition to usage, the channel marketing automation platform should also be able to track all necessary input and output metrics tied to your social marketing, search marketing, event marketing, email marketing, or other marketing mechanisms.

**8. Single-Sign-On (SSO)–** In addition to these core edit capabilities you should be able to manage access (add, delete, modify users, rights, etc.) in a dynamic way, either from your partner portal or via your channel marketing automation. Therefore your channel marketing automation platform must have a Single-Sign-On (SSO) connector.

**9. CRM Integration–** Last but not least, for you to allow your country teams to access your content management system from your channel marketing automation platform, you will need to make sure data can flow back and forth from your existing CRM platform, whether it is on Salesforce.com, SAP, Microsoft Dynamics, Oracle or another CRM platform.

These nine core capabilities of your channel marketing automation platform are critical to enable your country teams to access global materials, customize them and use them locally – either using internal company resources or via external marketing concierge services or creative agencies. ZINFI’s Unified Channel Management platform, comprising Partner Relationship Management (PRM) and Partner Marketing Management (PMM), allows any organization to seamlessly deploy global content and assets and customize them locally.



## 9 Is Email Marketing Dead?

**T**he short answer is – maybe. It really depends whether you are trying to use email marketing to reach a stranger or to contact someone either you know or who knows you. The whole notion of opt-in email marketing evolved almost a couple of decades ago but email marketing is often viewed as spam because so very few people actually follow the rules. Too often we see email marketers sending out emails to a broad list of recipients that they have procured either from multiple sources or from random traffic to their website.

The real characteristic of email marketing is that it is an interruptive process. Suppose you are in the middle of your workday; you are waiting either for a phone call or you are actually making a call or in a conference call and an email arrives. If you look at it and see that it is from an organization you don't know, for the most part you simply delete the email without reading it. Data shows, however, that when an email comes from an individual, even if we don't know them, there is more likelihood that people will open it a lot more than an email coming from John Smith than one from a generic email ID such as "Marketing", "Sales" or "Tech Support". Why is this? Because we

relate to people. It follows that, if the recipient of the email knows you, they are far more likely to open the email than if it came from a stranger. The success of email marketing is heavily linked to relational or relationship marketing. But the question is, how do you build a relationship with a potential prospect when you have not previously interacted with that individual? That's where social marketing comes in.

**“**Today, most prospective buyers of solutions tend to look online for what they need. They search based on vendor names, or on category topics, but once they start searching they tend to focus on the set of sites that are presented to them through search engine results pages (SERP). **”**



Over the last decade, and especially over the last 5 years, various channels of social marketing have evolved. Today, most prospective buyers of solutions tend to look online for what they need. They search based on vendor names, or on category topics, but once they start searching they tend to focus on the set of sites that are presented to them through search engine results pages (SERP). If your company crops up within the top 10, 15 or 20 results, chances are that a prospective buyer will click through to your site, as long as the topic they are searching for is aligned with the theme of your website or blog. When a prospect lands on your website, you have a unique opportunity to start forming a relationship.

It is very important for you to capture two sets of information from prospects: their company name and the nature of their interest category. You can do this very easily by giving them the option to sign up for a newsletter. If they do sign up, you have confirmation of their category of interest. This enables you to start sending these prospects value-added email content focused on that specific topic of interest. If you are sending an email newsletter you can tweak the subject line to more closely reflect the topic in which the prospect was interested, even if the body of the newsletter will contain other articles or other topics. For example, if you are a hardware manufacturer selling networking products, switches, routers and firewalls, and the prospect expressed an interest in information on firewalls. Then the follow on communication should highlight firewalls in the subject line.

You still have the freedom in the body copy of the newsletter or email marketing piece to include other articles on routers or switches or a security solution, because the prospect may also be interested in other, ancillary areas. Whenever prospects land on your website as a result of your email marketing efforts and navigate to topics that interest them, you need to be able to automatically configure and push content that is relevant to that specific reader. Providing information of value to the end user is an important step in building a relationship, keeping the reader engaged, and coming back to your site for more.

Email marketing may not guarantee a quick sale, but it is certainly not dead when it comes to relationship-based marketing, as long as what you offer in return is of genuine value or interest. However, if you buy a list from an unknown third party (there are a whole bunch of sites today offering email address lists) you are not doing justice to your prospects because you are sending emails at random without knowing the preferences of the recipients. If you load an un-scrubbed list in an email engine and send out wholesale blasts, the chances are that the majority of people on the list will opt out because,



as Seth Godin said, “This is no longer invitation marketing, it is interruption marketing”.

Basically, this approach is what is now considered ‘spam’. Emails are categorized as spam when they are unsolicited, irrelevant, contain only superficial commercial value, are sent in bulk to an unfiltered list of recipients, and don’t offer an opt out option. Beware of this: not only does this approach offend the receiver, but also they are likely to mark your emails as spam. (In Canada, the laws on spam have tightened considerably so that recipients of bulk emails must proactively opt in before the sender can legally correspond with them.) The more that your prospects and users mark your emails as spam, the lower the reputation of your email engine drops, which can result in your communications being blacklisted. This type of email marketing is definitely dead. But if email marketing is used in conjunction with targeted social marketing and other integrated marketing tools, such as direct mail or online information capture, email marketing can still be a very powerful tool.

At ZINFI, we provide an integrated marketing platform which has several components related to direct marketing, i.e., email marketing, social marketing, search marketing, microsite marketing, video wall marketing and more. When you choose the right combination of tools – for more information please refer to our article – 5 Tips for a Winning Trifecta: Search Marketing, Social Marketing and Email Marketing – then success is in your sights, with email a very important component of that puzzle.



## 10

## Making Content Syndication Work For Your Channel Partners

**V**endor organizations that sell through a network of channel partners (resellers, VARS, affiliates and agents) know that most of their partners do not have dedicated marketing resources to keep their respective websites updated with fresh content from their vendors. This is where content syndication can play a significant role, allowing vendors and their channel partners to significantly enhance brand presence, control and engagement with end prospects. To make this work, an organization will need to focus on seven core areas:

- 1. Deciding what to syndicate-** The objective of content syndication is not to replicate a vendor's website. On the contrary, the goal is to do two just things right: provide a set of core content that is relevant to a specific partner's customer base, and make sure the content stays fresh and up to date. This is not the easiest of tasks, since many vendors have hundreds or even thousands of pages of content that can potentially be syndicated. Prioritizing is key.
- 2. Setting up showcases-** Once you have determined what pages to use for your web content syndication program, the

next step is to determine how many content syndication showcases to set up. Again, the goal here is not to push your entire web site through your partner's site, but to select relevant groups of content, either by vertical market (healthcare, real estate, education, etc.) or by industry segment (small business, mid-market, enterprise, and so on).

- 3. Allowing customization-** If all of your partners do not sell all of your product lines, you will need to provide your partners with the means to customize your content syndication showcases. This customization capability is critical to ensure partners can show the specific set of products, pages, collateral and other content that is relevant to their business.
- 4. Capturing leads-** While protecting your brand message and getting the right content out to multiple end-users via your channel network are both critical, it is also important to make sure you and your partners can track leads. For this, you need to have in place a channel marketing automation platform that not only allows you to deliver dynamic content



syndication, but also to track the leads that are being captured from different showcases.

**5. Promoting showcases** – With relevant showcases being syndicated via the partner website, the next most important task is that the partner is provided with the ability to promote those showcases via digital networks such as social or search. To make this happen, you should pick a channel marketing automation platform that allows you to provide marketing elements such as web banners, buttons and connectors to promote the showcases. Also, the content syndication capability should include an integrated email marketing capability to drive outbound campaigns to a partner's installed base of customers and prospect

**6. Running reports** – No matter what content syndication platform you chose, you need to make sure the dynamic reporting engine gives you a complete sense of what is really going on with content marketing campaigns. The important thing is, once a partner is syndicating content, you need to be able to run analysis to see what showcases generate

the most leads and what changes can make to render this investment even more effective. For this, you need powerful content syndication reporting capabilities.

**7. Refining your approach** – As you begin tracking your partners content syndication activities, you will come up with your own ideas on how to improve the layout of your showcases, what product to include or exclude, which market segments to emphasize, and how best to align your content development strategy – beyond what's on your corporate website – with how you leverage a distributed content network to maximize partner success.

The main benefits for content syndication activity are threefold – control or expansion of your brand via a distributed network, extension of your reach to end-prospects and users via your channel, and improving your message based on dynamic analytics to achieve more ROI from your content. If you take a structured approach towards content syndication, you and your organization – including your channel partners – can greatly benefit from this investment in channel marketing automation.







## 11

## Why Web Content Syndication Is Critical for Content Marketing

**C**onsumer and business buyers all go online to do their research before committing to a purchase, reading peer reviews and comparing products as a normal part of their decision making process. The entire sales cycle has turned upside down: now it's a buying cycle. This dependence on online research has made web content syndication critical for content marketers. In the B2B and B2C spaces, sales success is no longer dependent on how you reach out to prospects, generate leads and forecast your pipeline. These days, your sales pipeline only begins at the last stages of buying, so if you are to have a prayer of influencing the process, your marketing cycle must be in complete alignment with the buyers' buying cycle. A strategic approach towards web content syndication is of great benefit in helping to manage this cycle.

In the old days, content marketing essentially consisted of creating advertising, packaging, promotional flyers, tradeshow materials, and maybe issuing occasional press releases. The advent of the Internet changed the way the business world viewed the distribution of content, and press releases took more importance. About a couple of decades ago we started to

hear the word web content syndication, but it primarily meant distribution of press releases, along with some occasional blogging. However, during the past couple of decades, buyers' behavior changed – especially with the evolution of search engines and advent of social media. Therefore, it is very important to understand the impact of the following two critical factors:

**1. Evolution of Search Engines–** Let's talk about the evolution of search engines, and importance of web content syndication first. Most buyers – starting with consumers – started to search online about fifteen years ago. This enhanced Google's advertising revenue growth, and an entire industry evolved to support keyword-based content optimization and web content syndication. Today it is taken for granted that your website must be keyword optimized unless you are to rely on expensive and – frequently – untargeted advertising campaigns. Websites are most commonly seen as a dynamic platform for web content syndication and a vehicle for a web content syndication based content marketing strategy.

“ *The world is moving inexorably towards a completely digital business experience, both for consumers and business buyers. Your priority today should be to focus on content marketing and web content syndication, both of which will play a critical role in your success as a marketer. If all you do is optimize your site for keywords, without leveraging the power of content syndication, you will leave much of your sales potential unrealized.* ”

**2. Impact of Peer Influenced Buying-** The second major wave that has now changed how we buy is social media, and it is not just through sites like Facebook, Twitter, LinkedIn, but through peer review sites and content. Peer influenced buying has become the most critical influencing factor in purchasing, a trend that has been led by customer reviews on Amazon, Yelp, eBay and others – including most recently the evolution of G2Crowd for the B2B software space. Many organizations today use web content syndication to distribute customer reviews, comments, and technical observations via various social media sites to differentiate themselves from the competition. It is easy to imagine, as the years go by, that the influence of market and industry analysts will wane; to be superseded by crowd sourced reviews as the key influencers of the solution research phase before purchase.

So, the critical question is how do you win in this age of search and social media driven buying? The answer is very simple – with great content. But what does that mean? Well, great content can be categorized into three primary categories:

- 1. A clear web content strategy-** It is about developing a website strategy that is focused on optimizing your entire web content around a set of keywords for which your buyers are constantly searching. You need to attend to this as a priority, before applying your thoughts to web content syndication.
- 2. Content distribution strategy-** Once you have optimized your web content, the next step is about distribution of content using your choice of a variety of web content syndication engines. Some of the social media and blog management tools allow you to post and stream content from your own site, but you need a clear strategy on how you will do that in order to obtain the best results.
- 3. Building a network effect-** The third and final critical component is, if you are selling through the channel, allowing your channel partners to use web content syndication to promote your content via their websites. This can significantly amplify your reach to a significantly wider audience, and will also help you to control and enhance your brand presence, and generate real time leads.

The world is moving inexorably towards a completely digital business experience, both for consumers and business buyers. Your priority today should be to focus on content marketing and web content syndication, both of which will play a critical role in your success as a marketer. If all you do is optimize your site for keywords, without leveraging the power of content syndication, you will leave much of your sales potential unrealized. On the other hand, if you take an integrated approach towards content marketing, leveraging content optimization and web content syndication as well, then you can significantly increase your reach, reduce your advertising cost, and influence your buyers in a positive and holistic way.



## 12

## Social Media Syndication - Amplify Your Brand & Generate Leads

**T**he way we go to market to get our messages out to consumers has dramatically changed during the past five years. Social media syndication, in particular, has become a critical tool in getting messages heard by a large network of channel partners. Why the focus on social media? Because the business of marketing is no longer just a function of advertising and public relationship activities. Marketing has evolved into a discipline that integrates technology, processes and people to create and distribute messaging and managing reputation around the core brand promise.

Process and technologies are critical pieces of the puzzle, but with the advent of social media marketing, people (customers, employees, partners, industry watchers, etc.) have moved to the center of this new era of marketing. No longer is there a monologue that supports brand messaging. Instead, marketing it is very much dependent on public dialogue and conversations that dynamically determine the depth and breadth of the brand. And, when it comes to channel marketing automation, social media syndication not only plays a critical role in creating and managing brand presence and promise,

but also becomes a critical tool for lead generation via the channel.

Before we delve into how exactly an organization selling through the channel can leverage social media syndication, let's briefly discuss which components are most important and how they fit into the overall digital marketing puzzle.

As marketers today, we have embraced the fact, and acknowledged the supporting data, that the buying process has fundamentally changed. Gone are the days when a consumer or a business buyer waits for a sales rep to call or buys based on watching an advertisement in mainstream media or visiting a booth at a trade show. Buyers today – consumers or business – all go online to do their research on business issues and the vendors who can potentially help solve their problems. This online search process invariably brings the searcher to social sites such as LinkedIn, SlideShare or Twitter for B2B buying, and Facebook, YouTube or Pinterest or other vertical social sites for consumer purchases. It follows that, if your organization does not have a presence in those media spaces,



**“ You can amplify your reach to your potential target base via a robust social media syndication platform that can tap into your partners’ followers and get your messages out rapidly and in a focused way not only to build your brand value, but also to fill your pipeline. ”**

a significant opportunity to build awareness and engagement is lost.

Social media syndication has the capability to amplify your brand presence via your channel partner network.

Let’s say your organization has a couple of thousand followers on various social media channels. This is a fairly average number for most business organizations selling to B2B buyers. Now, you are incredibly blessed if you have an indirect sales force, aka channel partners (affiliates, agents, value added resellers, system integrators, etc.), because the chances are that they also have at least a few hundred, if not a few thousand followers in their own social networks. So, if you are able to get your messages out to a few dozen partners, and tap into their communities, your reach has just achieved an exponential increase. A good social media syndication tool can enable any organization to reach very effectively into their partners’ networks with relevant, interesting content.

Now let’s talk about what you need in a good social media syndication tool. These are the five core capabilities to look for...

**1. Single panel to manage social media streams –** Your organization probably has multiple social media channels. Whichever social media tool you use – like Hootsuite or SproutSocial – you need a single console from which you can disseminate content to your individual social channels. Your social media syndication tool should allow you to do this seamlessly.

**2. Managing distribution of content to your channel–** Not all company information streams targeted at end-users

are relevant for your channel partners. You need either specifically created content that you know for sure that you can auto-stream to your audience, or you’ll have to hand pick other items of general corporate content to feed into the channel distribution network. Again, your social media syndication tool must have the capability to enable deep levels of customization.

**3. Distributing content by region and partner type–**

This capability is not available in the majority of direct marketing social media management platforms. However, it is likely that, when you are marketing via the channel, your messaging for markets like China or Japan will be very different from what is appropriate for the US or UK. Messaging must also vary according to your partner type, so you will need to select a social media syndication platform that allows you to apply these criteria to your marketing activities.

**4. Tracking impression metrics–** Once you have most of your channel connected to your social media syndication platform, you need to be able to roll up metrics at a worldwide level, and also to slice and dice the data effectively to understand what is working and what is not. You will very likely see deep variations from one country to another, and further differences in responses to your content according to partner type and, further, to their installed base.

**5. Managing campaign ROI –** Last but not least, one of the most important functions of social media syndication is = to allow your partners to keep their installed base informed of changes, improvements and special offers via social streaming. The end goal ultimately is to help the channel achieve new leads from existing customers and potential new prospects. Your social media syndication platform should be able to capture leads and track them in detail too.

It’s easy to see why, in today’s age of digital content marketing, your social media network matters. Crucially you can amplify your reach to your potential target base via a robust social media syndication platform that can tap into your partners’ followers and get your messages out rapidly and in a focused way not only to build your brand value, but also to fill your pipeline. ZINFI’s Partner Marketing Management (PMM) platform includes an integrated social media syndication capability that can enable you to reach your prospects and customers globally and locally with proven ROI techniques from social media marketing.



# 13

## 5 Stages of Lead Management

**L**ead management is one of the top marketing keywords that is searched on Google every day, which is a clear indication of the huge and growing amount of interest in the topic. Are we clear on what lead management means? Basically, lead management is an organized way of generating, distributing and managing contacts with potential prospects, and engaging with those prospects to identify or generate an opportunity for a sales team to pursue. Lead management is one of the most important business functions, bridging both marketing and sales, through a combination of people, process and automation.

Just like a fish out of water, a lead has a specific and limited lifetime. Once a lead has appeared, it needs to be nurtured, managed and closed systematically. A typical lead management system will allow an organization to manage five critical phases of the lead life cycle, as follows:

**1. Lead Generation** – Content marketing has displaced the old model of telemarketing to generate leads. Today's marketers know that buyers search online and, by the time they contact a vendor, they have a very clear idea about what they are

looking for. This is the precise point where the first step along the path of systematic lead management, using an integrated approach to lead generation, must be taken. Integrated tactics like social marketing, search marketing, email marketing, direct mail marketing, and online banner ads, are all critical methods of generating awareness and create a solid foundation for inbound marketing. If you combine inbound marketing with outbound telemarketing towards your installed base of existing customers and interested prospects, you can exponentially increase the effectiveness of your lead generation efforts.

**2. Lead Distribution** – With leads in the pipeline and interest from prospective buyers, the next key step in lead management is lead distribution. I can't emphasize how essential it is to have an automated mechanism for lead scoring and distribution. Not all leads are ready for sales contact, so either they need to be nurtured further (please see Point 3, below) before being handed to an inside or outside sales rep or, in the case of channel-based organization, must be distributed to the right channel

partner. This is where a rule-based lead distribution engine comes in. Any state-of-the-art channel marketing automation platform should be able to distribute a set of leads to a group of partners based on various criteria, such as partner type, partner location, partner competencies, or interested buyers' segment, e.g., SMB, mid market, enterprise, vertical or geography.

**3. Lead Nurturing** – Another critical component of lead management is lead nurturing and scoring. A marketing automation platform should be able to automatically create a multi-touch engagement with a potential buyer based on their purchase behavior. A prospective buyer's online persona should be scored in a systematic way, and appropriate sales people (whether internal captive or external partner-based sales reps) should be alerted when a lead is ready for contact. This systematic approach towards lead nurturing is critical to drive sales efficiency, increase closure rate and build the reputation of an organization as a responsive provider in their marketplace.

**4. Lead to Opportunity Creation**– Once a marketing-qualified lead has been converted to a sales-qualified lead, the next big step is to develop the opportunity. This is the moment for exact deployment and fit analysis. This is a critical sales step, and also an essential part of the lead management process. Most existing CRM systems provide an effective

“ *The key is to select a marketing automation platform (for a direct sales organization) or a channel marketing automation platform (for an indirect sales organization) that allows you to roll the system out over a few quarters.* ”

way of tracking and managing opportunities, but they aren't designed with the channel in mind. If you are selling through the channel, make sure that you use a Partner Relationship Management platform that can drive opportunity creation and management through the channel in a dynamic and distributed fashion.



**5. Lead Management Analytics** – Last but not least: the most important step in lead management is to integrate the marketing and sales processes seamlessly, via a dynamic analytical engine that allows you to see clearly how effective your marketing is, how well your messages are aligned across multiple market segments to drive better engagement and conversion, and the steps you need to take to improve the efficacy of your sales programs and campaigns.

At first sight this list may seem like too much to handle for an organization that hasn't yet implemented automated lead management processes. However, it is not that difficult if you deploy lead management systems in simple automated processes, step by step. The key is to select a marketing automation platform (for a direct sales organization) or a channel marketing automation platform (for an indirect sales organization) that allows you to roll the system out over a few quarters. Rome wasn't built in a day, and this definitely applies to your state-of-the-art lead management system. But by taking the first step towards automated lead management, and identifying a reliable automation vendor to partner with, you can not only increase your sales, but also substantially reduce your marketing and sales costs.

I would love to hear from you where you think your organization is and what challenges you have faced to either deploys or to plan a deployment of a state-of-the-art lead management process. Thank you for continuing the conversation!



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## 5 Tips for a Winning Trifecta: Search Marketing, Social Marketing and Email Marketing

**W**ikipedia defines trifecta as “a parimutuel bet in which the bettor must predict which horses will finish first, second, and third in exact order.” The good news is that when you are running a digital marketing program you don’t need to be quite so precise in order to win the bet as long as you are properly using three key tactics: Social Marketing, Search Engine Marketing & Email Marketing. And in fact, if you upgrade your usage of just one, you can make the others work more effectively as well.

Over the past couple of decades, the way we track down a good B2B vendor has changed completely. Where once we sifted through magazines or asked industry forums, now almost everything happens through online searches. In recent years, multitudes of social marketing channels like Slideshare, Facebook, or LinkedIn groups, have emerged to create a rich source of interest-specific content. These channels not only offer a value added source for news and product information, but are also a great way to listen into peer reviews and conversations.

As a B2B marketer today, it is almost impossible to run an effective digital marketing campaign without an integrated approach for using the trifecta of search marketing, social marketing and email marketing. Sifting through the mass of information on the topic, I’ve found that we can distill the key ingredients of a successful digital campaign into five key picks:

- 1. Picking the right content strategy–** It is vital to plan a content calendar would stretching out for at least a six to twelve month cycle, and identify what products or solutions will be promoted, and when. It’s easy to get sucked into the habit of creating content for content’s sake, but without a cohesive content marketing strategy and calendarized plan it is almost impossible to get high ROI from digital campaigns.
- 2. Picking the right tactics–** Once you have figured out your content framework, then you need to work out how best to promote the content that you would like your prospects or customers to consume. Content types and approaches differ

“It is not that difficult if you deploy lead management systems in simple automated processes, step by step. The key is to select a marketing automation platform (for a direct sales organization) or a channel marketing automation platform (for an indirect sales organization) that allows you to roll the system out over a few quarters. The one-off approach might be an email prospects to a webinar or an event or announce a buy one get one free promotion. Or introduce a weekly or monthly newsletter offering value added content to potential and current buyers. Just remember to tie in these approaches with your search and social marketing game plan. Also be sure to invite readers to sign up with your social marketing.”

widely for Facebook, LinkedIn, Twitter or Pinterest. Slideshare or YouTube can have high worth as value added tools, but need to be clearly aligned with content strategy in order to make an impact.

- 3. Initiating search optimization**– While there is value in spending advertising budget on paid search, organic search can yield much better results and broaden the funnel to include people who may not be ready to buy, but are ready to engage with your content. Therefore, when a content calendar is being developed, it is important to understand what key words you are going to focus on for the next six to twelve months – not just today – and optimize around that longer term objective.
- 4. Being socially prudent**– More is not more when it comes to social marketing. The goal is not to push random content and dilute the engagement. We need to be strategic about separating substance from noise. Substance, for example, would be a success story, and noise would be a low-priority version update announcement that doesn't align with your overall solution marketing message. So, when you build your social marketing network, you need to be clear about how you will deploy content via each channel. Your content will drive user or reader engagement, which in turn will build your relationship with a future customer.
- 5. Optimizing the balance** – You can leverage different social marketing channels to promote solutions and products, while still mapping them to defined keywords and an overall content strategy. Make room within your plan for tightly defined tactical activities as well as more strategic, long-term communications. The one-off approach might be an email prospects to a webinar or an event or announce a buy one get one free promotion. Or introduce a weekly or monthly newsletter offering value added content to potential and current buyers. Just remember to tie in these approaches with your search and social marketing game plan. Also be sure to invite readers to sign up with your social marketing. This will increase your search engine ranking – especially when you align with your keywords strategy and content distribution.

ZINFI's Partner Marketing Management (PMM) platform can substantially enable a vendor to provide a set of integrated tools to their channel partners, allowing them to run digital marketing campaigns by leveraging the winning trifecta search marketing, social marketing and email campaign.

In a future post, I'll talk more about how to accelerate building the sales funnel by coupling these tactics with tele-prospecting and telemarketing.



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## 7 Tools You Need To Be Successful in Social Selling

**H**ow things have changed during the past decade! Just a few years ago, outbound business-to-business (B2B) selling to the mid-market and enterprise – was mostly an exercise in cold calling. Now, with the advent of digital marketing and the evolution of CRMs and B2B list providers, the way that super-effective sales people sell today is very different. The sales process has evolved into an integrated social selling exercise, and it's far more complicated. The question is what steps do we need to take to be effective sales persons today?

It boils down to seven critical tactics that, if they are aligned step-by-step, will increase sales effectiveness many times over... While the sales process has always been about building trust with a potential buyer who is interested in a seller offer, how that trust is built today is totally different:

**1. Social Networking** – The first step in social selling is about building your social network. In the old days, we used to call it the Rolodex, a highly personal but time-consuming and fallible system of keeping track of contacts. LinkedIn has completely changed all that. It's second nature to send

a 'connect' invitation to new business acquaintances and potential prospects. But it is incredibly important to manage this network carefully, not only to maintain brand awareness, but also to stay relevant as a professional connection.

**2. Social Sharing** – Once you have built a network, it's tempting to share content. The question is what content is appropriate to share? What will truly interest your contacts? Do you need to write it yourself or can you share or reuse content from other sources? Sharing relevant, valuable content on a regular basis is incredibly important because it allows you to stay on top of mind and connected to your target prospect and customer base. Social sharing is the beginning of social selling. And, to do this right you need a Social Syndication capability that allows you to share relevant posts via multiple sites in a couple of clicks and track necessary metrics.

**3. CRM** – Yes, I know. Mentioning CRM as a critical sales tool nowadays is like saying we need to drink water to survive. There are many great CRM options available to choose from



and I'm not going to recommend one over another. Just pick one and truly use it. Drinking water is not enough – you have to have eight glasses a day. Learning to use your CRM tool effectively is critical for success.

**4. List Scrubbing** – Now that you have a lead flow (from your marketing team, social networking and sharing etc.), you want to make sure that your target list is as accurate as possible. Don't spend time cleaning this list by yourself. Your time is valuable. Find a list services vendor and get your target database scrubbed a couple of times a year. In most businesses today, people change jobs every 3-5 years, so every year 20-35% of your contact database needs cleansing. You need a professional organization to do this for you.

**5. Email Marketing** – The goal is not to make you an email marketer, but a more effective hunter-gatherer. You can't complete your social selling process without an effective email marketing tool. An office email application like Microsoft Outlook is a terrible way to prospect! You need a state of the art email marketing tool that allows you to send emails from a set of pre-populated templates and that allows you to track open rates, click-throughs, etc. This intelligence is critical for your efficiency and success.

**6. Rapid Dialer** – With 1-5 covered, now is the time to make sure you dial out using a modern, purpose-built sales platform that increases your connect and conversion rate. It takes a lot of effort to build a funnel of potential prospects, so make sure you reach out to them effectively. An industry-leading platform such as ZINFI's Automated Rapid Dialer, should allow you to dial out 20-30 calls an hour, leave or email pre-recorded voice mails, and send follow up emails with just a click or two.

**7. Analytics** – Last but not least, you need to know how you are doing, what is working and where you can improve. Access to dynamic sales and prospecting reports is critical for you to keep raising the bar on your own performance.

This list of tactics and tools can seem overwhelming for a busy sales person. The good news is that there are platforms like ZINFI's Marketing Automation tools that can give you a complete end-to-end control of social selling, allow you to get up and running in just a few minutes, and even provide marketing concierge support to help you push content via your social selling network. The right processes and the right tools will help you meet your goals and stay ahead of your competitors.



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## Leveraging Unutilized Market Development Funds (MDF) To Drive Partner Marketing

**“U**se the money you already have.” Are you familiar with this age-old piece of advice? The common rejoinder, of course, is that you have no funds left. But are you sure? Have you looked at your overall marketing scope and activities? Have you utilized all available market development funds (MDF) or co-op dollars? In our experience, when organizations sit down and take a close, detailed look at their finances, nearly 9 times out of 10 they discover leftover or unused partner marketing funds.

Most organizations selling through the channel allocate top 1% to 2% of their revenue—referred to as contra-revenue—to market development funds (MDF) or co-op funds. Surprisingly, most channel companies discover that the amount allocated to channel marketing funds is equal to or more than the amount allocated to corporate team members. Typically, those channel marketing funds cannot be used for direct marketing. They can be used either by a distributor for partner recruitment, training,

enablement and demand generation, or by a channel partner for end-user for activities like demand generation and training.

Now, the reality is that in most cases these market development funds (MDF) are not allocated at a corporate level; instead, they tend to be managed by the regions. However, in almost every case—with proper coordination by corporate sponsorship—significant value can be provided to the regions by rolling up channel marketing funds and driving global initiatives that are relevant for the region. In this scenario, the region does not give up control of their funds, and from a financial perspective the market development funds (MDF) show up in their regional or country-level financial books. However, if corporate teams lay out programs that can be easily comprehended and used and delivered within a region—i.e., if they embrace a point, click and release methodology—funds can be allocated to global programs that can drive regional- or country-level impact.

*“ZINFI has experts at a global, regional and corporate level who can discuss with you how to put together programs that you can fund via distributors or local resellers by using your unutilized or underutilized market development funds (MDF) and generate demand via partner recruitment, training and multi-partner demand generation.”*

If you are trying to roll out channel programs by leveraging market development funds (MDF) globally, then you will need to find a channel marketing agency that can help you do this in multiple markets. To be successful, this agency will have to be able to accept payments in various currencies and comply with various tax jurisdictions. The agency will also need to have legal standing and be able to satisfy all necessary contractual requirements.

ZINFI is uniquely positioned with its global channel marketing automation and service delivery infrastructure based on 11 legal entities around the world supporting 26 languages, enabling customers like you to plan globally but act locally by properly deploying your unused channel marketing funds.

ZINFI has experts at a global, regional and corporate level who can discuss with you how to put together programs that you can fund via distributors or local resellers by using your unutilized or underutilized market development funds (MDF) and generate demand via partner recruitment, training and multi-partner demand generation.







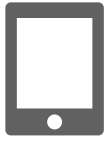
# 17

## 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



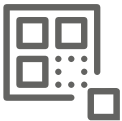
## Mobile Ready Application

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.



## 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.



## 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.



## 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.



## 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.



## 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.



## 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.



## 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.



## 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.



## 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.



### 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.



### 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.



### 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 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.



### 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.



### 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.



### 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.



### 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.



### 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.



### 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.



### 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.



### 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.



### 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

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.



### 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 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.



### 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 Technologies

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 and innovative state-of-the-art SaaS Unified Channel Management automation platform that streamlines and manages the entire partner lifecycle through three core state-of-the-art SaaS applications—partner relationship management, channel marketing management and channel sales management. In 26 countries, these three core UCM SaaS applications are locally supported by ZINFI's global marketing services team members.





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

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