Partner Portal
Best Practices Guide

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A Letter from the CEO

The Leader in Unified Channel Management

Dear Channel Professional:

Thank you for downloading this new guidebook on partner portal best practices. For organizations marketing and selling in a channel environment, the partner portal is a primary means of communicating with partners and providing them with the tools they need to create awareness of your solutions, generate leads and close deals.

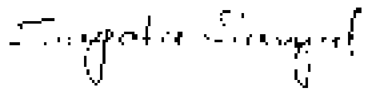
Unfortunately, most partner portals fail to deliver on their promise, and many partner organizations don't use them regularly, if at all. Partner portals must change constantly, and vendors need to plan carefully and continuously manage their portal to ensure it remains easy to use, is effectively organized and provides ample opportunity for partners to provide feedback about channel programs and the vendor's solutions.

The Partner Portal Best Practices guidebook is designed to serve as a valuable resource for vendors who wish to take a more structured approach to managing their portal. In it, you will learn about the most important tools and features a portal should have, where partner portal technology is headed in the future, how to inform partners of the portal's benefits and important metrics for assessing your portal's effectiveness.

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

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

Sincerely,



Sugata Sanyal

CEO and founder of ZINFI Technologies

How This Book Is Organized

This booklet is divided into four sections. Section I provides a brief introduction and a letter from ZINFI's CEO. Section II presents a series of articles that focus on partner portal basics, including the most important features to have, what partners are looking for in a portal, factors to consider when deciding whether to build or buy a partner portal, and how to select and deploy a partner portal. Section III is all about making the partner portal work for you and your partners. This section includes chapters about using the partner portal for sales enablement and lead management, the importance of having an easy-to-use interface, social marketing tactics for increasing partner portal usage, key partner portal metrics and much more. There are countless ways to increase partner activity via the portal, and you can learn about many of the best ones right here. Finally, Section IV provides a brief introduction to ZINFI's integrated solutions that together comprise its industry-leading Unified Channel Management platform: partner relationship management (PRM), partner marketing management (PMM), partner sales management (PSM) and global marketing services (GSM).

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

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

Enjoy!

❶ The #1 Feature for Your Partner Portal Software

In today's age of digital business process transformation, it is likely that an organization doing business via a network of channel has deployed partner portal software to automate their engagement process with their partners. However, too often partner portal software fails to deliver, because most products lack the most important feature. What is it? How do we know it's really the #1 feature? Both are fair questions, and I will try to answer them here in a structured way.

When you think about the partner ecosystem for any organization, it is fair to say that—just like human beings—no two partner organizations are exactly alike. They may be trying to sell the same set of products and services from a vendor, but they all try to differentiate from each other. Therefore, they build different motions and workflows and have different needs. For partners to be successful they need to have real-time access to relevant information, and the partner portal software must be able to deliver it.

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In addition to delivering real-time information related to programs, pricing, policies and other key information, one other very important function of the partner portal is to provide personalized content and programs. A smaller partner may not have the competency to sell certain products and services, while a larger partner may be able to carry the entire line of solutions a vendor provides. A partner portal software should be intelligent enough to figure this out and differentiate between a small and a large partner.

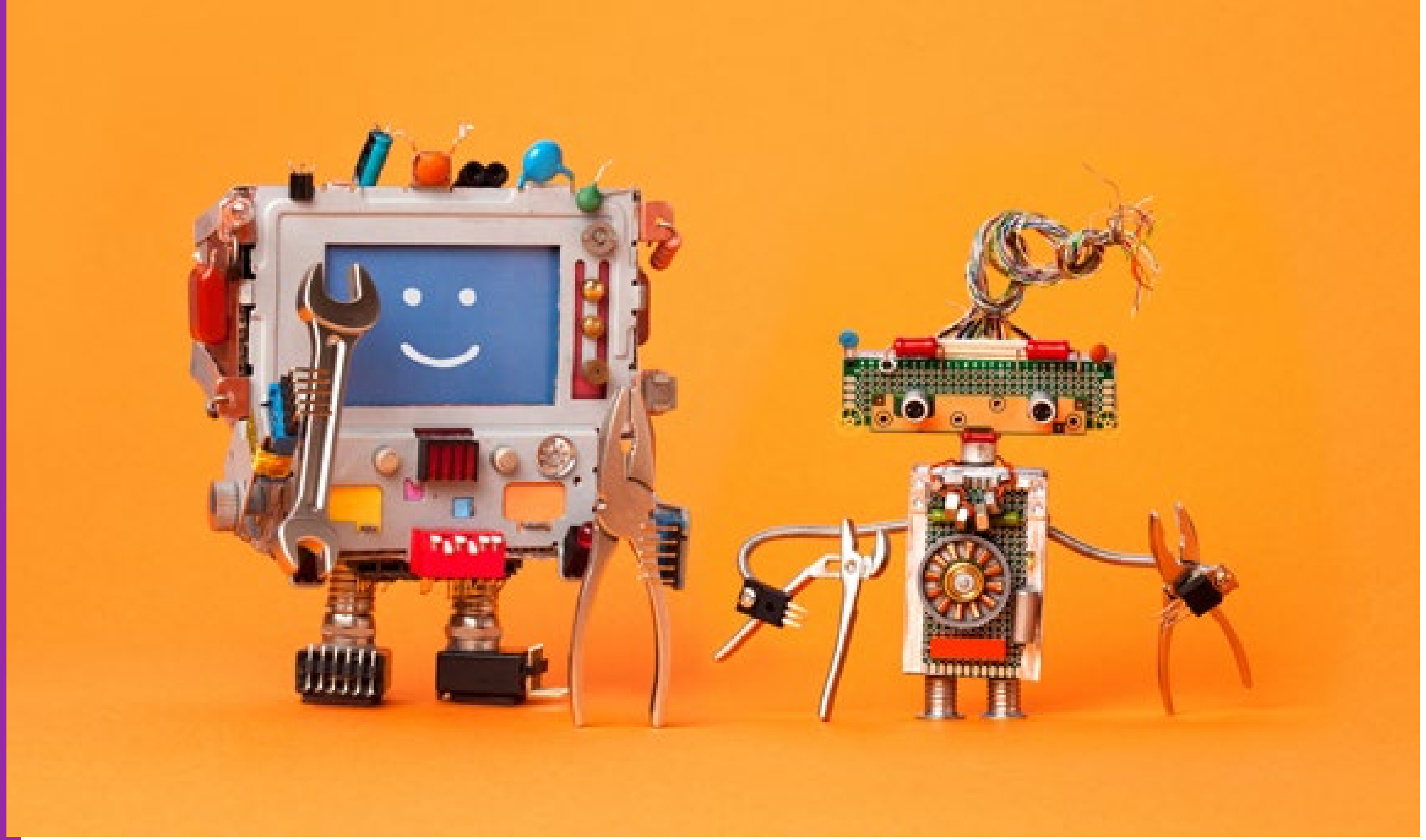
Now, let's add to this vision a global dimension. For vendors selling their wares all over the world, it is also essential to make sure that the partner portal software can speak local languages, and offer programs, products, pricing and other content that's appropriate and relevant to specific countries or regions. This is critical to drive partner adoption. Partner portal software needs to be able to provide such content in a dynamic fashion in local environments.

In addition to personalized access in a localized experience, the partner portal software should also be able to address the needs of the partners through a mobile experience. Most partners are mobile. A few individuals, perhaps in technical or administrative roles, may operate behind a desk, but most marketing, sales and service professionals are now mobile. Partner portal software should have the capability to address partner needs wherever they need it—at work, at home or on the road. Partner portal software that offers a fully mobile experience is critical.

I could keep going and start deep-diving into other dimensions, like contracts, business planning, marketing, sales, incentives and so on, but there is one theme that applies to all of these capabilities. They need to be personalized and be relevant to a specific partner or a group of partners with similar needs. How do you do that? Well, you can address that via your partner portal software, provided that the software has a fully dynamic partner profiling capability. That's right, you guessed it: The #1 feature of partner portal software is partner profiling.

So if you find yourself asking what partner profiling is and why it is important, then you are asking what I believe to be the most important question related to your partner portal software.
As I tried to make clear in this article, for your partners to be successful, they need to have access to the right information (based on their profile) at the right time (home, office or away). This can be only done if you partner portal software is intelligent enough to recognize who individual partners are, how they differentiate from other partners, where they are located and the specific types of content they need.

It's really quite simple: Your partner portal software's profiling capability is the "brain" that can recognize who is logging in, where they are logging in from and what they need. Without granular partner profile management capability, your partner portal software will truly fail to deliver.



2 Nuts and Bolts of Your Partner Portal Software

All organizations selling through the channel need an Internet portal to interact with their partners. In order to create this digital engagement, a vendor must procure, configure and deploy partner portal software. The great news is that there are many options today that didn't exist even a few years ago when it comes to basic requirements for a partner portal software. In this article, we will explore the key requirements for partner portal software in today's channel marketing environment.

- **First**, all partner portal software must have a granular partner profile management capability. The primary purpose of this partner profiling capability is to provide a partner system of record that can pull in all necessary information about a partner organization and its employees. This information can include training status, marketing and sales activities, actual sales performance, incentive utilization and more. By leveraging this partner profile data, a vendor can control the features and content in the portal that the partner portal software allows particular users to access.

- **Second**, partner portal software must be mobile responsive. Most channel partners today are constantly out and about. It is essential that partner portal software not only provides mobile access that is fast and presents content that is easy to navigate, but also offers an overall user experiencec that's comparable to the experience a partner would have when using the portal on a desktop computer. This alignment is quite important to make sure from a user interaction perspective the experience is fully unified.

- **Third**, the partner portal software must provide access to document libraries, where a vendor can upload all necessary partner-facing documents, such as channel policies, training materials, product data sheets, price lists, incentive guidelines, and marketing and sales playbooks. A vendor should also be able to provide these documents in a selective way to a group of partners based on their access rights and organizational profile. This can only be done right if the partner portal software has great partner profiling capabilities, a feature we touched on earlier.

- **Fourth**, the partner portal software must also have state-of-the-art co-branded asset utilization capabilities. That means a vendor should be able to upload various types of vendor brand assets like email templates or web banners in HTML format, web videos in HTML5 format and PDFs, and allow channel partners to easily add their company contact information along with a proper partner logo. These co-branding activities should be controlled in a seamless way to protect the vendor brand, but also should provide enough flexibility to address the needs of the partner organization.

- **The fifth** and final essential capability for the partner portal software centers is a robust business analytics engine. Any organization interacting with their partners via partner portal software needs to be able to tell who logs into the portal and when, and what they do once they log in. This information is critical to improving portal design, content layout and personalization to make sure the partner can swiftly move in and out of the portal and get what they are looking for. Most channel partners have to access dozens of partner portals to get what they need. Therefore, ease of use is a paramount factor, but that can only be achieved if a vendor understands—by reviewing proper analytics—how the portal is being used and what needs improvement.

The five requirements that I have listed above are truly basic nuts-and-bolts requirements for partner portal software. Of course, if your channel is more mature and has more complex requirements than this basic set of partner portal features can satisfy, you will need to explore other applications like partner onboarding, business planning, contract management, partner incentives management, partner training, as well as partner marketing and sales management—which includes lead management, deal registration and configure price quote (CPQ) capabilities. The list of capabilities for full-featured partner portal software could be quite long, and only vendors like ZINFI offering a Unified Channel Management (UCM) platform can satisfy a comprehensive set of requirements. However, if you are in the early stages of building and growing your channel, you should make sure you at least have the nuts and bolts of your partner portal software properly figured out and configured for success.

❸ Must-Haves For Your Partner Portal

As we talk to our client base and their channel partners, we hear a high level of dissatisfaction with vendor portals, whether it's the technology platform, ease of use or how the content is uploaded, managed and used. Yet In every aspect of portal management, huge opportunities exist to drive more ROI by lowering cost and by increasing usage through making the portal relevant to partners.

We have been doing partner research for the past few years to understand what would improve usage of partner portals and make them a true value added tool for channel partners. Across all partner types we have consistently found demand for a core set of capabilities that would rapidly drive up portal and content utilization. Here is a summary of our findings:

1. **Localized Experience**
   While most large vendors tend to have somewhat localized partner portals and user interfaces, the majority of the vendors today do not provide a fully localized experience. English tends to be the language of choice, and it does work for about half to two thirds of the worldwide market, but products that are sold globally through a large channel network really need to have a completely localized user interface, as well as localized content. While content localization is relatively easy, most portals do not take that extra step of providing a localized user interface and experience. To achieve this, it's essential to pick the right Partner Relationship Management platform offering localized software user interfaces for key languages.

2. **Single-Sign-On (SSO)**
   Since most current portals are built up over years, using multiple discrete point solutions, these portals essentially end up acting as a gateway to various other tools, e.g., learning management systems (LMS), marketing development funds (MDF), Deal Registration, Sales Rewards, Rebates, etc. While a vendor may not be ready to switch to a completely new platform that provides all integrated tools in one platform, they should at least consider working with their other platform vendors to provide SSO connectivity. Why? Simply because partners do not remember passwords to all of these standalone platforms, so utilization rates go up instantly when you provide SSO.

3. **Unified Platform**
   If you are starting early in the game (like many early stage startups) or organizations that have recently decided to provide a state of the art partner platform, then you are already thinking about what a change you can make to partners' experience. Look for a Partner Relationship Management (PRM) vendor with a good reputation in the market place, and that has successfully completed small, mid and large size deployments. Size matters because use cases vary a lot, so while you may be a large organization you may be working with countries that have smaller set up needs. Therefore, a vendor that only addresses large markets in the English language may not be the right for you if smaller, lucrative countries like Korea or Poland are not properly supported.

> *"How can you do that when you have a massive amount of content in your portal? You can substantially reduce it if you tag content by roles, so technical users get to see mostly product and technical related content, while marketing and sales folk tend to see content that is specific for them."*

4. **Mobile Responsive**
   Most partners are out of the office at least fifty per cent of the time, and therefore access emails, websites and documents over their handheld devices—be it a smart phone or tablet. Therefore, making sure partner portals and the tools to which they connect are fully mobile responsive is absolutely critical. Data from our in-house research shows that mobile responsive partner portals experience three times more access and usage.

5. **Search Optimized**
   If you are a vendor with multiple product lines and a large volume of vital content, making that content searchable is incredibly important. While the starting point is that sites need to be mobile responsive and have a unified access, the platform should also allow natural searches across various content categories, e.g., marketing, sales, products, technical, etc.

6. **Role Based**
   One of the surest ways to drive content access and utilization is follow the mantra "less is more". How can you do that when you have a massive amount of content in your portal? You can substantially reduce it if you tag content by roles, so technical users get to see mostly product and technical related content, while marketing and sales folk tend to see content that is specific for them. If you have a good partner-profiling program in place, you should be able to determine which users should have specific type of content.

7. **Dynamic Content**
   Can you serve up portal content based on what your partners should see? Even if you have role-based access, you still need a platform that allows you to manage your content dynamically without spending a lot of resources. This is only possible when you have a dynamic content management system.

8. **Portal Training**
   No matter how localized, full-featured and easy-to-use your platform is, in the end you still need to train your partners how to use your platform. This is a low hanging fruit, yet many vendors end up skipping this step. While there may be tons of content on product and programs, rarely is there enough content on how to use the partner portal. Spending a fraction of your channel budget by building training videos always drives up usage.

9. **Integrated Analytics**
   Once you have gone through all of these steps, the key is to stay alert to what's going on in the channel and on the portal, and keep learning. This can only happen when you have embedded and integrated analytics that allow you to know what partners are using, what they are using on your portal, so that you can constantly update, modify and position content appropriately.

We realize that this is a long list of must-haves, and it may be overwhelming for you and your organization to start implementing these changes. The good news, however, is that, there are options available that you can easily deploy step by step, to make these changes happen sequentially over an extended period. ZINFI's Partner Relationship Management (PRM) and Partner Marketing Management (PMM) applications provide you a state-of-the-art platform with solid performance records from dozens of localized deployments that can address your partner portal needs in a holistic way.

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❹ Seven Essential Requirements for the Next-Generation Partner Portal

What is a partner portal? What are the primary components of today's partner portal? Where does program content end and relationship automation begin? And why are so many systems needed to make it work (even though in reality we know that most of the elements of the partner portal don't actually work well together)? In truth, most partner portals today require too much work and too much dependency on subsystems like CRMs and learning management and incentive management tools that are all patched together. We know they don't flow together well, they don't work together well and ultimately they create a very complex experience for all users. As a result, partners are frustrated, vendors are frustrated, programs are not updated on time, and it's hard to find price lists or product information or the latest training information or events. Basically, it's a nightmare.

What if we took a different approach? What would the next-generation partner portal look like? What about adopting a unified approach that creates an entirely different user experience? If you had a magic wand, perhaps you could wave it and rebuild your partner portal today in a way that would make it really easy for your partners to log in, find the information that's relevant to their role, search for and easily find the tools they need to do what they need to do and then get out—and all of this within few minutes. Wouldn't that be wonderful? In this article, we'll explore the seven essential components you need to make available to your partners in a high-functioning partner portal, and then seven additional capabilities that your own organization requires in order to manage that partner portal effectively.

The Unified Partner Experience

When a partner logs in to the partner portal, he or she will access multiple tool related to program information, product pricing, product details, training, incentives, marketing plans, sales plans and so on. That entire experience needs to happen in a seamless way. When a partner goes from one zone to another—say, from the marketing zone to the sales zone—the experience shouldn't change. However, the prevailing reality today is that each of these zones are supported by different systems that are poorly integrated, and so they repeatedly encounter different user interfaces and different workflows. For example, partners may have to enter the same information multiple times as they move from zone to zone within the portal, despite the fact that the information is already in the system. It's really a clumsy experience.

The goal of the unified partner experience is to eliminate all of these issues. To get there, your partner portal needs to address seven key requirements:

1. **Personalized access.** When a salesperson logs in to the partner portal, all of the elements of the partner portal available to that individual should be about sales. There is no point for that person to be reading about technical issues or marketing programs and plans when that individual is not responsible for those aspects of the business. Similarly, if a technical person logs in and is fully focused on technical content or content related to products and solutions, there is no point for that individual to have access to content related to sales incentives or marketing development funds or any other sales- or marketing-related materials. Personalized access is the most important way to simplify the user experience. As a part of that requirement, it's essential that the entire engagement with the partner portal always be fully localized—i.e., it needs to appear in the user's own language.

2. **Onboarding automation.** This is a huge enabler, especially if you have a broad channel with hundreds or perhaps thousands of partners and are constantly launching new products and bringing new partners into the program that you frequently have to stair-step on 30- or 90-day cycles on various aspects of your programs. When you can automate these steps, providing automated checklists that take partners sequentially through each critical functional area (marketing, sales, financial planning, technology, etc.)—and when these processes are customized according to a partner's role—the process becomes highly efficient and, most importantly, it keeps partners informed about what they need to do next. Here's an opportunity to significantly scale your engagement model global by various functions and roles.

3. **Programs library and management.** As soon as your partners log in, they should be able to easily find the marketing programs that are available in that specific quarter. For example, a salesperson logging in should be able to immediately access all of the sales programs available that quarter. If there are incentives or specific initiatives that are being rolled out in that time frame, the salesperson should know about it. Whatever the program—marketing, sales, initiatives, dividends, etc.—it's crucial to promote such programs in a structured way, so that individual users see the programs that are relevant to them at exactly the right time. A well-designed partner portal is absolutely essential to making that happen.

4. **Training & certification.** When you launch a set of solutions that require some level of training, whether you are in insurance or real estate or franchises or technology, your channel partners need to be properly trained. You may have a simple training & certification program, you may not have any formal program at all, or you may have a very complex program with multiple certification tracks. In every case, however, the partner should be able to log in and, based on their role and their own business initiatives, be able to find the proper training, create a learning path and a certification path that will take them through the programs step-by-step and get educated—either online using a learning management system or offline by attending your events and training sessions. The entire learning experience needs to be totally unified, whether partners are attending training sessions or certification sessions, and partners should be able to manage the entire experience online in a seamless way.

5. **Business/functional planning and contract management.** Today, if your channel management team engages with channel partners (especially the larger ones) to put together marketing or sales or financial or technical plans, or perhaps put all of these together into a single business plan, you need a structured way to manage that process through the partner portal. Today, most of those engagements still happen through email, and it's extremely difficult to keep track of them, especially when a set of partners transfers over from one channel manager to another. It's almost impossible for the new channel manager to get up to speed, and in many cases the manager actually loses that engagement. Again, providing a unified experience through the partner portal is essential to addressing the problem.

6. **Incentives management.** Based on their performance, partners should always know what additional rewards, rebates and market development funds they can access. If this information is not revealed in a logical way and partners have to spend a lot of time figuring out where the incentives are, they will disengage. The outcome? Over

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half of incentive dollars in partner programs today are simply not utilized. That's because partners struggle to find which programs relevant to their activities are being funded, how to apply for the funds and how to claim them when they meet the performance requirements. There must be a unified experience in the incentives area that links back to how a partner was on-boarded, what planning they did, what programs they attended and what training and certification sessions they participated in. In most systems today, that information doesn't flow together and thus requires way too much effort for partners to find.

7. **Community.** We have entered a Web 3.0 model that's moved beyond crowdsourcing. It's about tapping into the knowledge of the community. Think about it: Your channel partners hold a huge reservoir of knowledge about your products and solutions, how to position against the competition, about emerging opportunities that may be impossible for you to track directly. Think of community as a vibrant forum where partners can share ideas, pictures of events, current activities—not only generating excitement among partners, but also creating a corner where you can find inspiration and ideas for improving your products, solutions and channel programs moving forward.

> *"How does your business plan look? Can you easily edit it? Can you show varieties of relevant content through the plan or through a contract or an incentives page? That's the kind of capability you need to be able to leverage, and without having a PhD."*

Unified Vendor Experience

Now that we have explored the essential parts of a unified user experience, let's spend at least a few minutes thinking about a unified vendor experience. How can a unified experience make your life, as a vendor managing a partner portal, easier? At ZINFI, every time we talk to a potential customer who is struggling to manage their global partner portal, we tend to hear about the same basic challenges and requirements.

1. **Group and role management.** This is closely related to the personalized and localized access I referred to in the previous section. For your partner portal to be successful, you have to be able to set up multiple roles and multiple groups by partner tier, partner classification, partner business model, capabilities, etc. in order to customize what individual partners are able to access when they log in. If you are a several-million-dollar company, chances are you have a significant volume of information that is not relevant for every partner who accesses the partner portal. When you upload programs, incentive, training—all of the content your partners are accessing—it's absolutely essential that you are able to tie all of that information back to the specific partner groups or roles you have created so they are exposed only to the most pertinent information.

2. **Dynamic content management.** Your partner portal's content management system should be fluid enough for you to manage the entire partner experience—through web pages, and through the relationship management and automation I talked about earlier. The web content management piece of this should seamlessly interact with the functional automation piece. How does your business plan look? Can you easily edit it? Can you show varieties of relevant content through the plan or through a contract or an incentives page? That's the kind of capability you need to be able to leverage, and without having a PhD.

3. **Asset management.** Think about the variety of assets used to train partners: product sheets, pricing sheets, program information; web content and downloadable content in the form of e-books, case studies, fliers, videos or podcasts. These are assets you are constantly uploading to your portal. You must have a dynamic asset management system in place that automates this process and streamlines your workflow significantly. Your partner portal has to be able to do that.

4. **Program management.** If you're a marketing person, whether you're managing channel marketing or channel sales, you're constantly running various types of marketing programs, sales programs and training programs. Your partner portals should be able to provide a unified experience whereby you set up these programs—whether they are one-directional and informational or are interactive and require the partner to register or perform some other activity. Again, you have to be able to manage that process through a seamless interface.

5. **Partner performance management.** Successful performance management requires that you be able easily construct a clear picture that shows how a partner is doing, including things like their sales volume, how they're performing in various functional areas, what programs they are attending, how many technical people they have, how many marketing programs they have run, what sales campaigns and/or initiatives they have pursued. You should be able to look at all of these elements, figure out what has worked consistently, and then create a performance plan that's realistic.

6. **Marketing and sales forecasting.** Planning out marketing ROI by allocating market development funds (MDF) or co-op funds is essential in today's economy. You have to know where things are working and where they're not. You have to be able to put together a marketing pipeline and then track those leads as they are converted into the sales pipeline and ultimately closed. In order to forecast ROI with a high degree of certainty you need to know what programs and initiatives have been successful. Without a truly unified platform, it is almost impossible to do that.

7. **Business analytics.** This is certainly one of the most important capabilities your partner portal should have: a dynamic business analytical engine that allows you to slice and dice the data in various ways to really understand what programs are working and why, which partners have been most productive and why, and what specific steps you can take based on the data to achieve a higher level of performance with the parts of the channel that are performing less well than they should. Business analytics can give you invaluable insights that allow you to intelligently reduce costs—not only by eliminating programs and streamlining the portions of the channel that aren't producing, but also by focusing on higher-impact ROI programs that will drive your growth forward. Your partner portal has to be able to do that.

This is a long list, I know, but the reality is that only a fraction of partner portals today are able to fulfill these requirements. You may be thinking that a unified partner and vendor experience is some kind of "pie in the sky" dream that is still 50 years away. The truth is all of this is possible today. At ZINFI, we help customers achieve this dream every day with our unified channel management platform, where partners and vendor users and other stakeholders like distributors all have a unified experience in the channel, and thus are able to do a lot more with a lot less.

5 What Partners Look for in A Partner Portal

Today, a partner portal is the primary interface that organizations selling through the channel use to communicate with their channel partners. Therefore, it is essential for channel organizations to know what partners are actually looking for when they log in to a partner portal. In this article we will explore three core characteristics a partner portal requires from the partner perspective.

But first, let's spend a few minutes exploring the purpose and value of a partner portal. Essentially, a partner portal is a digital support interface that channel partners use to access all the information they need to do business with a vendor and increase business from their customer and prospect base. However, most partner portals fail to deliver on this core promise.

When it comes to doing business on behalf of a vendor, partners look for key information related to the products and services they are reselling. They also need to know how to get support, find out what else is new and learn how best to serve their own customer base. Based on numerous partner surveys we have conducted, we can classify partner interests into three core categories:

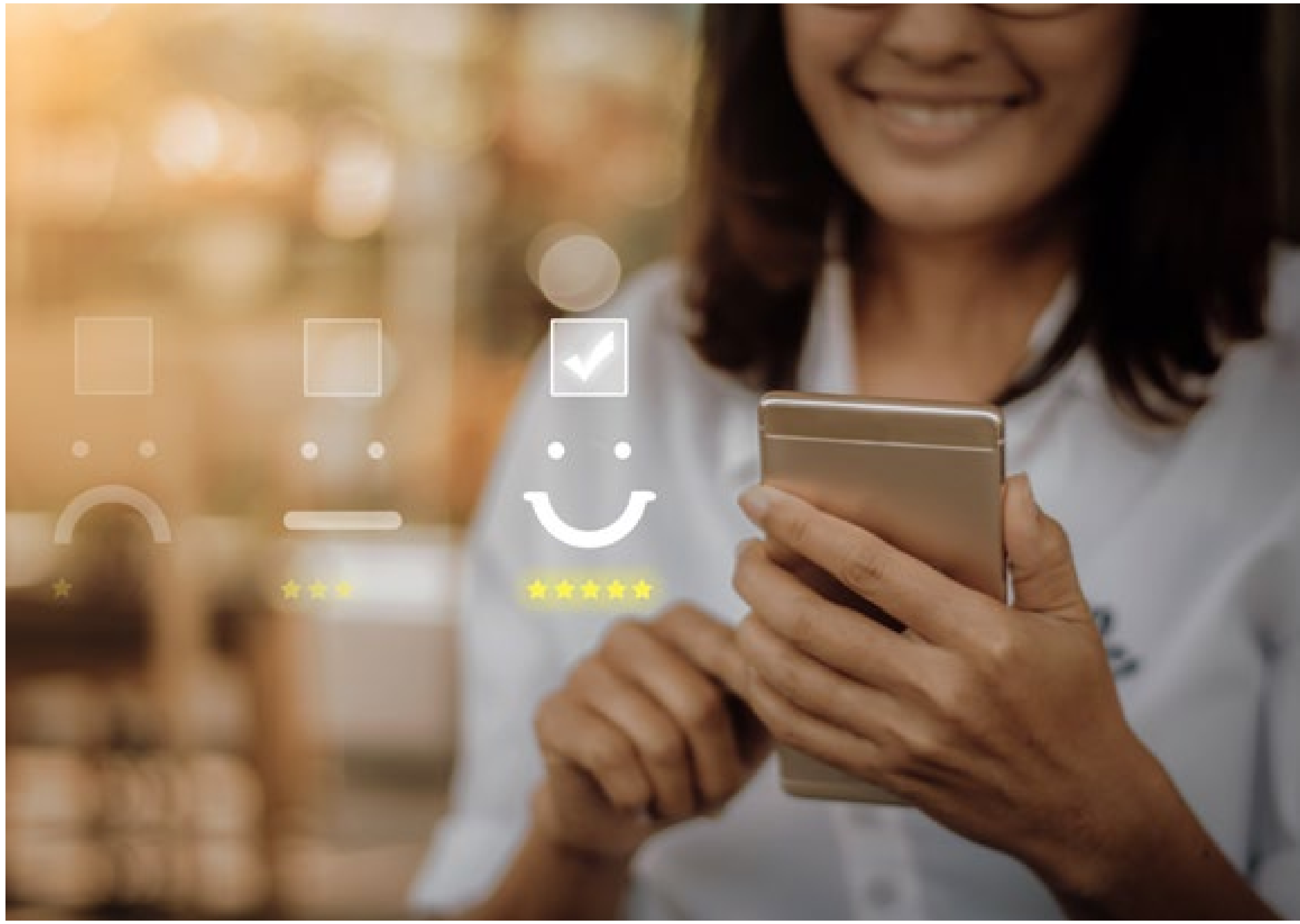
1. **Ease of use** – Partners are always in a hurry, so searching through an enormous volume of content can be quite time-consuming, confusing and, occasionally, an utter waste of time. An easy-to-use, mobile-friendly partner portal is therefore essential for partner success. Unfortunately, most organizations fail to understand that both navigation and content access are critical in making sure partners can find what they are looking for quickly, and these organizations rarely take the time to figure out how to make navigating and finding content easier for partners.

2. **Effective content organization** – The most visited sections of a partner portal are the support sections related to products and services, followed by price lists and product information, and finally incentives and promotions. To ensure partner success, channel organizations need to be sure their partner portal makes these sections highly accessible and easy to use.

3. **Feedback center** – The importance of feedback should be obvious, but this is an area that is often missing entirely from most partner portals. Think about it: If you give your partners an opportunity to communicate with you openly, you will quickly accumulate an enormous volume of feedback about various aspects of your channel programs, products and services—and you can use that feedback to improve your offerings and increase the effectiveness of your channel.

As you can see, this is not an insurmountable list, but addressing these areas satisfactorily does require careful thinking, planning and continuous management. A major challenge associated with any partner portal is that it is constantly changing, and, from the perspective of the partner experience, it can easily get out of control. Vigilance is key. Make sure your organization has a structured approach towards ensuring partner portal usability so that you are constantly reviewing the partner experience and reorganizing information in the portal as it expands. You want to make sure the partner portal continues not only to be the primary interface between your organization and its partners, but also a "first touch" that actually delights your partner base.

"Make sure your organization has a structured approach towards ensuring partner portal usability so that you are constantly reviewing the partner experience and reorganizing information in the portal as it expands."



6 4 Things Your Partner Portal Software Must Be Able to Do

Managing a direct sales force is challenging enough, but managing an indirect sales force (AKA channel partners) is even harder. Whether you are in the automotive, finance, real estate, technology or manufacturing industry, chances are you sell through an indirect salesforce. To properly manage, support and grow this indirect sales force, your partner portal software — which is a kind of digital "interlock" between you and your partner organizations — needs to do four basic things right.

Before we identify those four activities, let's step back for a moment and briefly examine the state of partner portal software today. Most vendors selling through the channel have a partner portal of some sort. At minimum, it is a content-sharing tool that vendors use to communicate with their indirect sales force, describing programs, promotions and policies. Organizations that are a bit more sophisticated with their channel management approach may even deploy partner portal software for lead management, and possibly to offer various incentives, like rewards, rebates and referral commissions.

As the maturity of a channel organization grows, companies leverage their partner portal to automate their business planning, contracts, training and other sales-related activities. Some companies take the step of deploying marketing capabilities via their partner portal software.

All these activities are useful, but often a gradual process of software evolution can cause the partner portal to end up looking like Frankenstein, with multiple interfaces and poor integration. That's typically what happens when you take an incremental, piecemeal approach to expanding partner portal software that was first deployed a decade or more ago.

This is where next-generation partner portal can make a big difference. In a separate article, we have discussed the future of partner portal software, and I could also spend plenty of time discussing specific feature requirements for a state-of-the-art partner portal. However, today I want to look at this from a business objective perspective and address the most basic things modern partner portal software platform needs to be able to do.

> *For any successful deployment there are many features that are required, but in the end your partner portal software should be focused on four core capabilities: partner recruitment, onboarding, enablement and management. Partner portal software should help you perform these activities more efficiently and at lower cost while driving growth.*

Channel management is essentially about workflow management—i.e., managing a set of business processes that create, share and capture value. It is essential for any partner portal software to address this workflow management at a fundamental level.

While the purpose of any partner portal software is to automate workflow, the key requirement is to address four relational sub-steps: partner recruitment, partner onboarding, partner enablement and partner management. These activities need to be clearly defined and automated in an appropriate order. This is essential for success.

Too often companies forget the entire purpose of deploying partner portal software is to make it easy for their partners to do business with the vendors and reduce the cost of managing the partner base for the vendor. When these two fundamental objectives are met, the deployment of partner portal software is very likely to be successful.

Yes, for any successful deployment there are many features that are required, but in the end your partner portal software should be focused on four core capabilities: partner recruitment, onboarding, enablement and management. Partner portal software should help you perform these activities more efficiently and at lower cost while driving growth. This may all sound like motherhood and apple pie, but it is not. It really works.

In another article, we will explore how you can manage these objectives in a seamless way by deploying state-of-the-art partner portal software both locally and globally.

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7 Future Trends for Partner Portal Software

If you are selling through the channel, it is probably safe to assume that you have a partner portal. There's nothing ground-breaking about that. However, this is 2016. Do you know when your partner portal was built and with what technologies? Why does it matter? Well, do you still use a typewriter? I doubt it—typewriters are obsolete. So why would anyone want to use a partner portal built on obsolete software? I'll have more to say on that later, but before we get into the weeds here, let's step back for a second and look at the history of partner portals and how they have been built over the years.

Past (1985 to 2000)

If you were selling through the channel in 1990s, chances are you had an extranet whose purpose was to provide your partners with access to price lists, datasheets, collateral, etc. so that they wouldn't have to wait for printed materials to arrive. The partner portal software was very basic. Actually, it was essentially a website with external login capabilities connected with some sort of a directory systems that mapped users. That's about it.

Now, during this phase a few companies like Channelware (which actually coined the term "partner relationship management"), Channel Wave and Blue Roads raised millions of dollars in funding to create more sophisticated and functional portals, but they eventually went out of business due to lack of business adoption, lack of complete solution sets, high prices, complicated deployment and a lack of a full web services infrastructure. So despite the fact that several organizations had the right idea, the market was not ready for widespread adoption—or one could argue these companies couldn't supply what the market needed at that point with their versions of a partner portal software solution.

Present (2000 – 2015)

Most companies who started in the late 1990s to build and develop partner portal software were not successful and shut down by early to mid-2000s. However, with the explosion of Internet-related businesses in the dot-com boom and the proliferation of enterprise application companies, point solution products tied to incentives management, rewards, rebates, etc. started to evolve. Companies selling through the channel realized that they could use their customer relationship management (CRM) platform to automate some of the workflow as well. So naturally, due to lack of any integrated end-to-end solutions, companies started to patch together partner portal software of various types.

> *"Due to long buying cycles—and given the past failures of other vendors—very few new vendors for partner portal software entered the marketplace. Most players in the partner portal software space today are left over from the second wave of patched-up solutions and very few have a truly complete vision of what the future of partner portal software will look like."*

However, this patchwork of discrete point solutions created complexity, made the partner experience less than desirable, and made the total cost of ownership unbearable for organizations selling through the channel. Also, due to long buying cycles—and given the past failures of other vendors—very few new vendors for partner portal software entered the marketplace. Most players in the partner portal software space today are left over from the second wave of patched-up solutions and very few have a truly complete vision of what the future of partner portal software will look like.

Future (2015-2030)

Nils Bohr, a Nobel laureate in physics, was once quoted as saying, "Prediction is very difficult, especially if it's about the future." Well, we have also heard that the best way to predict the future is to create it. So I'd like to talk about what we at ZINFI believe about the future of partner portal software and what we are doing to create that future. We believe the future of partner portal

software requires seven MAGICAL elements. The partner portal software of the future will be...:

- **Modular:** That's because enterprises are not going to rip and replace their entire infrastructure, and because there will be very few companies who can compete without a fully end-to-end automation platform in place.
- **Adaptive:** As companies turn on different modules of the partner portal software, these modules have to fit into an existing infrastructure and have to adapt to data flows on both PC and mobile platforms.
- **Global:** Whatever partner portal software is selected for deployment, it will necessarily have to accommodate a global infrastructure, including things like European data privacy laws and the regulations of various countries.
- **Intelligent:** The customer will need to be able to learn more about what works and doesn't work in their channel management approach by understanding and analyzing the intelligence that is provided by the analytical engine of the partner portal software.
- **Comprehensive:** Eventually, when all of the modules are turned on, the software will automate the entire channel marketing process from end to end, and it will manage the process through a unified, integrated approach.
- **Affordable:** Of course these deployments will have to be priced competitively, and it will also have to be possible for growing enterprises to deploy cost-effectively. Therefore, the total cost of ownership will have to be clearly visible and the return on investment must arrive within a few months instead of years.
- **Localized:** Because deployment is comprehensive and global, it is essential that the entire experience be localized in multiple languages—not only to make it easy for vendors to do business with partners but also to make sure that portal content is relevant and responsive.

When it comes to partner portal software, the good news is that there are a few companies like ZINFI who have already been working towards this vision for some time now. We at ZINFI have taken the lead in defining the category of Unified Channel Management, and the unified approach can be truly MAGICAL. If you want to know more about ZINFI Unified Channel Management and the future of partner portal software, please visit www.zinfi.com.

8 Should You Build or Buy Your Next Partner Portal?

If you have started reading this article, chances are you are looking to buy your next partner portal or build it internally. We face prospective buyers every day, some of whom grapple with this very question. Whichever option an organization chooses, it can be a struggle to justify the decision. Let me make an attempt to lay out a logical argument for both, and let you decide which line of reasoning makes more sense to you. However, let's begin by establishing some context and describing clearly what a partner portal is. For the sake of our discussion here, I will use the term "vendor" to refer to the primary brand that is relying on a set of external organizations (secondary brands) to sell, support and service the its products or solutions.

Almost every organization today of reasonable size and complexity either has, or is considering, selling its solutions via an indirect sales force, either through a partnership with another large company or through partnerships with a diverse set of companies or institutions. Whether these co-selling entities are fully responsible for acquiring new prospects, selling and support or are engaged only in a part of these core activities, they are participating in channel referral, sales or services activities. Nearly every vertical today has some form of a channel-based customer acquisition and product/service delivery mechanism in place. To successfully interact with this external set of partner companies, the organization selling or supporting via the channel needs a business portal that allows them to train the external organizations and keep them informed of all product- and service-related changes, improvements, commission structure, pricing, incentives, etc. This business portal has been traditionally called many things, including a partner portal, dealer portal, alliance website, agency portal, agent's portal, wholesaler portal, extranet and more.

Most organizations have some kind of a basic business portal in place. Sometimes the portal is built internally using productivity tools like SharePoint . In many cases the portal is an extension of basic CRM infrastructure such as Salesforce, SAP and Microsoft Dynamics, but in other cases it is merely an extension of a company's corporate website and associated infrastructure. However, in almost every case the application is not purpose-built for channel workflows and activities, and it fails to deliver a set of integrated tools that are designed specifically for partner recruitment, engagement, enablement and management. The majority of these portals also fail to provide deep analytical tools that can provide insight on various types of partner profiles and their productivity drivers. Furthermore, almost every one of these portals fails to deliver a set of integrated marketing and sales tools—apart from basic asset-sharing—that enable channel partners to market and sell the vendor's product and services with the same level efficiency and effectiveness that the vendor itself would bring to those activities.

To complicate matters further: Since organizations are living and breathing entities that change on a regular basis to address market and customer needs, the way a vendor does business with its partner base necessarily changes on a regular basis. A static business portal made with a random collection of tools will completely fail to evolve and adapt to ever-changing business needs. This is why companies that have extended enterprise software from their direct applications—i.e., what they use for their own sales, marketing, finance and other functions for internal purposes—have failed to achieve success with partner organizations using direct tools. The shortcomings of a static portal lacking a full set of integrated tools designed specifically for channel marketing are what is driving many companies today to look for external solutions. These include purpose-built software like ZINFI's Unified Channel Management SaaS platform that can fully automate the entire partner lifecycle from recruitment to engagement to enablement to management. I have written many articles about these activities, so I will skip the details here. However, assuming that you are aware of the importance of these channel activities, let's now take a deep dive into the fundamental question we began with: Should you build your own partner portal? Or should you buy a purpose-built application like ZINFI's Unified Channel management SaaS platform?

Now, before you conclude (understandably) that I am biased, let me make an honest case for the build scenario, because I do believe there are application areas where you might actually be able to build a partner portal better than what you can buy in the marketplace. What are these scenarios? I can think of five critical elements you must have in place to build and manage your own partner portal successfully:

Channel workflow expertise –The purpose of all enterprise software is to automate business activities and transactions. To successfully automate your partner management activities and build a portal that addresses partner life cycle management, you should have the ability to map out various workflows related to your channel organization. If you are a vendor selling software through the channel, you may be able to do this.

1. **Software development capabilities** – Once you know how to map your business workflows and create software development specification documents, the next thing you need

is to have a team of software developers who can build your enterprise portal. You will need access to them not only to build the portal, but also to maintain it. As I indicated earlier, the portal will need to evolve on a regular basis.

2. **External outsourcing capabilities** –If you don't have a full-blown software development team but have a web team that has capability to set up your corporate website, you may be able to augment those resources by hiring external software development

3. **companies** —onshore or offshore or both—to build your portal. However, in that case you need to have very strong program management capabilities to ensure these companies successfully custom-build to your requirements.

4. **Executive time** –In addition to building out channel workflow, you also need a cross-functional team to meet on a regular basis to decide which parts of your portal you want to build out, why and how. This is a fundamental requirement: You should have a portal development and management taskforce that can provide constant oversight and determine what has to happen next.

5. **Budget** –Last but not least, the most important consideration when building out your partner portal is to have sufficient budget so that you can finish what you start and, most importantly, keep it going. Building your own partner portal will require ongoing maintenance and development support, because inevitably different elements of the portal will require changing. It is very important that you have the budget not only to start, but also to maintain and operate. Otherwise, you will end up with an unfinished Mona Lisa.

If you have all of these five elements in place, then you are in a good position to venture into a partner portal development effort. In reality, however, very few organizations actually have all of these capabilities. Even if they do, they should also consider the benefit of buying technology that has been developed and tested dozens or even hundreds of times, as opposed to investing in a solution that you will be building for the first time. With that in mind, here are the five primary reasons for buying your portal instead of building it:

1. **Industry knowledge** – Channel automation vendors like ZINFI build a technology platform that can address various workflows, from simple to highly complex. Every time we sell a portal to another customer, we gain valuable industry-specific knowledge. Every industry vertical is different. Even more important, every organization is different. While they all have requirements in common, many also have different or unique requirements. Our long-term access to a broad range of common and unique use cases has given us a depth of industry knowledge that your internal portal development team can never match.

2. **Scalable and secure technology** – Very few organizations, as I mentioned above, have the software development expertise that can build highly scalable, secure and usable enterprise applications. We can all perform at our family Christmas

dinner, but very few of us will play in Carnegie Hall. Writing enterprise software application requires deep expertise in scalable and highly secure technology platforms. Because of that deep industry knowledge developed over years, vendors like ZINFI can draw upon a highly competent engineering team with domain knowledge across many industries, as well as technologies that can address a variety of "corner case" applications.

3. **It works out of the box** – Have you ever thought about building a car or house on your own? Yes, there are people out there who build their own houses and build cars, but they are hobbyists. The question you need to ask is: Can your business afford a hobbyist culture? Or do you want to buy something from someone who does it for a living, the same way trained professionals build a house or a car? Also, consider that the people who build thousands of cars and houses can source their material, labor and knowledge in a much more scalable way than you ever can. A $10,000 car that you can buy out of the box might cost you millions if you were developing it on your own—and, in the end, it might not be nearly as good as the $10,000 car.

4. **Continuous innovation** – The beauty of SaaS applications is that as the cloud platform evolves, the technology that powers it also evolves. Companies like ZINFI that are in the business of developing SaaS applications are constantly learning, hiring, engineering and building what is next. This innovation cost is shared across thousands of users rather than a mere few, so companies like ZINFI can invest a LOT more in innovation to build out technology than a single organization can for its own use.

5. **Budget and time** – I combine these two together, because for enterprises time is money. When you look at the five things you must do to build your own portal, it's hard to justify it when you can get something out of the box and then quickly configure it to your specific requirements. When you do a cost calculation of building and maintaining versus buying and maintaining, the former is almost always going to be more expensive. And that calculation doesn't even take into account the hidden cost of lack of innovation. While you are trapped into building and maintaining on your own, your competition may be using a state-of-the-art portal from ZINFI and getting miles ahead. In the end, speed of execution impacts both time and money, so you will need to consider that factor as well.

At the beginning of this article, I said I wanted to help you develop a logical rationale for determining whether you should build for buy. If you are Microsoft, Oracle, Salesforce, SAP, Google or another very large software company, then, yes, you have pretty much everything you need to build your own portal. However, if you are not one of these companies, you should seriously consider buying from a provider like ZINFI, which has been named a leader in partner relationship management (PRM) automation and through-channel marketing automation (TCMA) in recent Forrester reports. If you are still not convinced, please give us a call and ask us to give you a demo. I also recommend you take a look this article in CIO magazine that argues it is usually far cheaper and faster to buy than to build. After all, if a problem has been adequately solved in a commercial product, why solve it again? Why not focus on a new and more interesting problem?

Hopefully, I have been able to provide you with a few more details and an analytical framework to figure out whether you should build or buy, and make a compelling case for one or the other.

> *"Companies like ZINFI that are in the business of developing SaaS applications are constantly learning, hiring, engineering and building what is next. This innovation cost is shared across thousands of users rather than a mere few, so companies like ZINFI can invest a LOT more in innovation to build out technology than a single organization can for its own use."*

9 How to Select and Deploy a Partner Portal Solution

If you have been tasked with finding a partner portal solution, the best approach is to follow a formal process in which you clearly define where you are as a channel organization and where you want to end up over a given period of time. Then you will need to investigate what is available in the marketplace.

As a leader in Unified Channel Management (UCM) solutions, we at ZINFI get to work with all kinds and sizes of companies, ranging from companies with fewer than 100 employees to enterprises with 100,000 employees or more. We have been providing channel management solutions—including partner portal solutions—for more than a decade now. The framework for selecting a solution I am about to suggest is based on our observations over the years, and it is applicable across the board, whether your company is just emerging or is an established global enterprise, and regardless of the vertical you operate within.

The first step in figuring out what you need in a partner portal solution is to ask, "What are the three to five most important ways to drive our channel sales?" This is important, because aligning your partner portal solution with your organization's core business goals is the best way to ensure your partner portal reaches its full potential.

The second step involves establishing detailed objectives around these core goals. Let's say, for example, that your goal is to recruit more partners. In that case, one of the key capabilities you need to look for in your partner portal solution is partner onboarding automation. On the other hand, if you are trying to minimize or eliminate over-distribution of your products in the channel, then you will want a partner portal solution that automates your management of programs like partner certification, deal registration, planning and similar functions.

The third step in selecting a partner portal solution is to identify some top priorities to focus on as you begin the process of automating your channel marketing workflow with a brand-new partner portal solution. For instance, if you do not already have a clearly defined deal registration policy and process in place, no automation tool will be able to help you with that. You'll also likely

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need to do some work getting members of your organization and your partner base to understand the benefits of automating and to buy in to that process. You may also need to establish a formal lead management policy that your partners can readily understand and accept, and then you can use your partner portal solutions to automate the steps involved. The point here is to anticipate basic requirements and formally plan for them before jumping in.

The fourth step is to establish a cross-functional team that will own and drive the build-out of your new partner portal solution. We have seen this principle play out multiple times over the years: Without the right executive sponsorship and alignment with core business goals, it is very hard to drive change in an organization. Also, a partner portal solution will need to be able to adapt to change as your channel objectives change, so it should be able to support various and evolving initiatives. You need to create a team dedicated to managing these challenges.

The fifth and final step is to carefully evaluate technology vendors (like ZINFI) in the marketplace and make sure that you end up buying and deploying a partner portal solution that is future-proof. The channel is a living organism and it evolves over a period of time. Your partner portal solution should be flexible enough in its architecture and comprehensive enough in its vision to evolve as your channel requirements change over time.

When you follow a deliberate process in selecting and deploying the right partner portal solution, you really can super-charge your channel. In today's age of artificial intelligence and digitization of business processes, it is critical to have right technology to enable success and stay competitive. However, what I've tried to show here is that success in automation is a function of careful expectation setting, planning and execution management. There is good technology currently available, and when you take the right steps in the right sequence, you are bound to get a handsome return from your investments in a partner portal solution and the associated channel investments. We see this all the time across companies of all types and sizes.

Are you ready to take the first step? Please feel free to reach out and set up a demo with us. We are, after all, the leader in Unified Channel Management solutions.

10 Making Your Partner Portal Work for Your Channel

In this information age any organization selling through the channel needs to rely heavily upon a digital interface – called the partner portal – to connect, communicate and collaborate properly with partners and drive commerce. These are the 4Cs (connect, communicate, collaborate and commerce) that fulfill the purpose of a partner portal's existence. However, most partner portals do not work well, and in this article we will explore why that's the case and what you can do about it.

1. **Mobility** – For most partners today, no matter what vertical you belong to, selling through the channel involves accessing the partner portal via your mobile devices, such as smart phones and tablets. Desktop-based access is still common, but mobility is a trend that's definitely on the rise and it won't be going away. Unfortunately, most partner portals are not designed with mobility in mind, and users who try to use the portal from a mobile device are likely to get frustrated.

2. **Ease of use** – The biggest challenge today is that the typical partner portal tends to work as an aggregator of discrete applications rather than as an integrated, unified tool. Partner portals often function as a gateway that connects multiple applications: documents, assets, lead management, market development funds, marketing tools, sales tools and so on. In many cases, organizations have patched-up a number of discrete tools to perform these functions. The result is a portal that presents a multitude of interfaces and is very difficult to navigate.

3. **Personalization** –Because of the issues raised above—lack of mobility and ease of use—it can be a huge challenge for partners to find the specific applications and content that they need. The only way to eliminate this challenge is to provide profile based-access where, for example, a partner that is in the healthcare vertical sees only healthcare-related content. Surprisingly, most partner portals today lack this basic capability.

4. **Application flow** – This is another major issue. When a partner portal has been assembled by combining a variety of stand alone applications for different functions, the flow of information from one application to another tends to get disrupted quite frequently. A chain is only as strong as its weakest link, after all. When data does not flow seamlessly between one application to another, partners have to constantly switch from one interface to another, which is both confusing and inefficient.

5. **Analytics** – You cannot improve something if you cannot measure it. This is especially true when it comes to managing the partner base and selling through the channel. When the applications in the partner portal do not work well together, it is almost impossible to run analytics across applications to figure out what is being used by which partners and understand how to improve the user experience. Because of that, many organizations are unable to make their partner portals work better. Instead of constantly evolving through a process of running analytics and reconfiguring to enhance the partner experience and productivity, partner portals tend to stay the same.

I could go on, but these five core problems explain why most partner portals do not work today for the channel. The good news is that these problms can be easily fixed. Partner portal solution providers like ZINFI can provide a complete end-to-end user experience that integrates and unifies all core functions and content—including documents, marketing assets, lead management capabilities, market development funds, marketing tools, sales tools, etc.—under a single umbrella at a highly attractive price. Thanks to ever increasing bandwidth, inexpensive storage and ongoing cloud application development, you no longer have to spend hundreds of thousands of dollars to build a partner portal. Today you can procure and deploy solultions like ZINFI's partner relationship management (PRM) application for a few thousand dollars a month vs. the tens of thousands it might have cost a few years ago. This more-for-less trend will persist, making it easy for organizations to address the fundamental challenge of making their partner portal actually work for their channel.

If you are looking for a way to making your partner portal work for your channel, then focus on a SaaS provider like ZINFI, whose platform can address mobility, ease of use, personalization, application flow and analytics, in a simple-to-deploy and affordable package.

> *"The good news is that these problms can be easily fixed. Partner portal solution providers like ZINFI can provide a complete end-to-end user experience that integrates and unifies all core functions and content—including documents, marketing assets, lead management capabilities, market development funds, marketing tools, sales tools, etc.—under a single umbrella at a highly attractive price."*

11 7 Reasons Why Your Partner Portal Is Not Used

The partner portal is possibly the single most important tool for a vendor selling through channel. While channel programs, policies and people are all very important ingredients for partner relationship management, in our digital world a properly built, state-of-the-art partner portal can make the difference between a successful channel program and one that fails. However, the majority of partner portals today never realize their full potential of serving the needs of the channel partners and enabling a vendor to scale its business globally. Why is that? Let's examine some of the primary reasons behind this failure.

1. **Portals are not localized.** Most companies that are selling globally today may have some localized web content, but typically the user interface of the partner portal is not localized. As a result, partners that are more comfortable doing business in English are absolutely fine, but in countries where English is a secondary language or where partners are simply not comfortable using English, those partners can be very hesitant to use the partner portal. At ZINFI, we have observed that localizing the portal consistently increases utilization by 30% to 40% on a worldwide basis.

2. **Lack of mobile responsiveness.** We know most partners are out and about seeing their customers. While some of the technical staff may be using the partner portal via the web on a desktop computer, most individuals at partner organizations today access the partner portal via a mobile application. Therefore, the partner portal needs to be—at the very least—mobile responsive. Ideally, vendors will provide a mobile app that delivers some core functionalities tied to things like partner onboarding, training, lead management, deal registration, incentives management and some basic reports. While the goal is not necessarily to replicate the entire partner portal in mobile form—an unrealistic and ultimately be overwhelming objective—there are several core features and functionality that it makes sense to deliver via a dedicated mobile app.

3. **Confusing content distribution.** A typical vendor that generates a few hundred million dollars in revenue selling through a partner base may carry anywhere from ten to several hundred product lines. Each product or solution is associated with specific content in the form of product data sheets, service sheets, pricing guidelines, competitive positioning, and so on. How is this content actually categorized, tagged and distributed? That's an incredibly important variable. Another crucial consideration is how new content within the partner portal is tagged and separated from older, less immediately relevant material. For example, if there's a new launch of a specific product or service, all of the content related to that should be promoted through the partner portal so it's easy for partners to find as soon as they log in, and is both web responsive and mobile responsive.

4. **Lack of robust search capabilities.** When partners come to your partner portal, they are already busy. They are carrying multiple product lines and are likely accessing multiple partner portals. When it comes to the partner portal, they do so with a specific purpose in mind. Our data shows that the number one reason a partner logs in to the partner portal is related to customer support: Either they're creating tickets or checking the status of their tickets because they want to monitor how they're doing in helping their customers. Other common reasons for logging in include learning about different products and services offered by the vendor, and accessing marketing and sales materials. In each of these scenarios, the partner is thinking of a specific purpose and a specific solution. The partner portal is rich with content, but if specific content is not easy to find via a quick keyword search, it defeats the purpose of having the content and the partners get frustrated and leave. That's why having great search capabilities within the partner portal is absolutely critical.

"Another crucial consideration is how new content within the partner portal is tagged and separated from older, less immediately relevant material. For example, if there's a new launch of a specific product or service, all of the content related to that should be promoted through the partner portal so it's easy for partners to find as soon as they log in, and is both web responsive and mobile responsive."

5. **Lack of training.** You may have a great partner portal, but if partners are not trained how to use it in the most effective way, then it becomes just another form of communication that remains underutilized. Vendors need to hold regular training sessions using some form of marketing concierge and actually walk partners through what's available in the partner portal, what's new and what's on the horizon. They should also make recordings of training sessions available in "bite size" chunks (read our article – How to Provide Partner Marketing Concierge Help in Bite-Sized Chunks) of two to three minutes each in a "Help" section or a "How to Use the Partner Portal Effectively" section. Without that content, partners may become lost and they won't know who to call. Without a marketing concierge infrastructure that offers training sessions and help videos, partners are left essentially to their own devices to figure out how to use the partner portal. Don't let that happen. Make bite-size videos available in every section of the portal (sales, marketing, etc.) that explain how to use that section. Teaching partners how to use the portal will drive up usage. It's that simple.

6. **Lack of a simplified program layout.** This is a very important consideration. If you're deriving most of your revenue from the channel, chances are you are recruiting new partners or recruiting existing partners into new programs. There is an area for that in your partner portal that focuses on onboarding. Or you may have partner training tied specifically to marketing, sales, incentives or technical products and services. The content that informs your partners about these different areas needs to be laid out in a simplified way so partners can quickly and easily access what they need. While most vendors spend large amounts of money on infrastructure and people to ensure the partner portal is properly supported and developed, many partner portals remain essentially an extension of a past in which partner-related functions were managed through a patchwork of multiple systems and programs. That kind of fragmentation inhibits usage of the portal. Vendors need to rethink the user experience and optimize how the programs they wish to promote are presented in the partner portal.

7. **Lack of program alignment.** Vendors typically offer a lot of programs tied to incentives. One of the most effective ways to drive partner program utilization is to promote specific programs—not just through emails or telemarketing aimed at end buyers, but by driving partners to specific parts of the partner portal, promoting those programs with incentives and providing related content right where they need it. For example, if you are running a specific campaign where a reseller can earn extra points or a sales rep can earn extra dollars, create a landing page that describes the campaign and the incentives offered, and make sure that training related to the solution you are promoting, as well any marketing programs and tools you are making available in conjunction with the solution, are visible from that landing page and easily accessible. Rigorous alignment of programs with content from various parts of the portal can drive up portal utilization substantially.

In summary, very few vendors actually take a formal, organized approach to driving utilization of the partner portal through strategic program usage and alignment. Don't forget, if you have a successful program, you can actually use that success, promoting it to increase partner engagement through your partner portal, but many vendors fail to take advantage of that opportunity. To do so successfully, however, user-centric considerations like localization, content layout, search functionality and mobile functionality all need to be carefully thought through. If you have a highly compelling solution that partners love to sell, or you've recently launched a new product line or you've just required a hot company, by all means promote that through your partner portal. But be careful you don't use that opportunity just to promote the portal or the product being promoted; instead, use it as a vehicle to get your partners trained on the portal. Having an integrated, strategic approach to driving partner engagement through the partner portal can significantly increase utilization across your entire partner base, and also drive your profitable revenue growth forward.

"Without a marketing concierge infrastructure that offers training sessions and help videos, partners are left essentially to their own devices to figure out how to use the partner portal. Don't let that happen."

12 How to Make Your Partner Portal More Partner-Friendly

At ZINFI, we work for major global brands and every day help thousands of their channel partners improve productivity. This is not as straightforward as it might be. One of the main complaints we hear constantly from channel partners is how hard it is to use most vendors' partner portals. Yes, a few are great, but most partner portals are complex to understand. When we ask partners what they would like to see in an ideal partner portal, the five things we consistently hear are not surprising, but somehow only rarely delivered:

1. **Ease of navigation –** Far too frequently, vendors use cool marketing lingo that is utterly confusing. Why use non-specific terms like "engage" or "excite" about your channel process steps when you can use simple, unmistakable words like "welcome", "join", "on-board" or "train". Calling a spade a spade is the first step in simplifying navigation in your partner portal. Also, categorizing your partner portal by straightforward functional areas like sales, marketing, technical or incentives is logical and doesn't require an effort to understand. Being too cool isn't clever. Ease of navigation starts with making things easy to grasp.

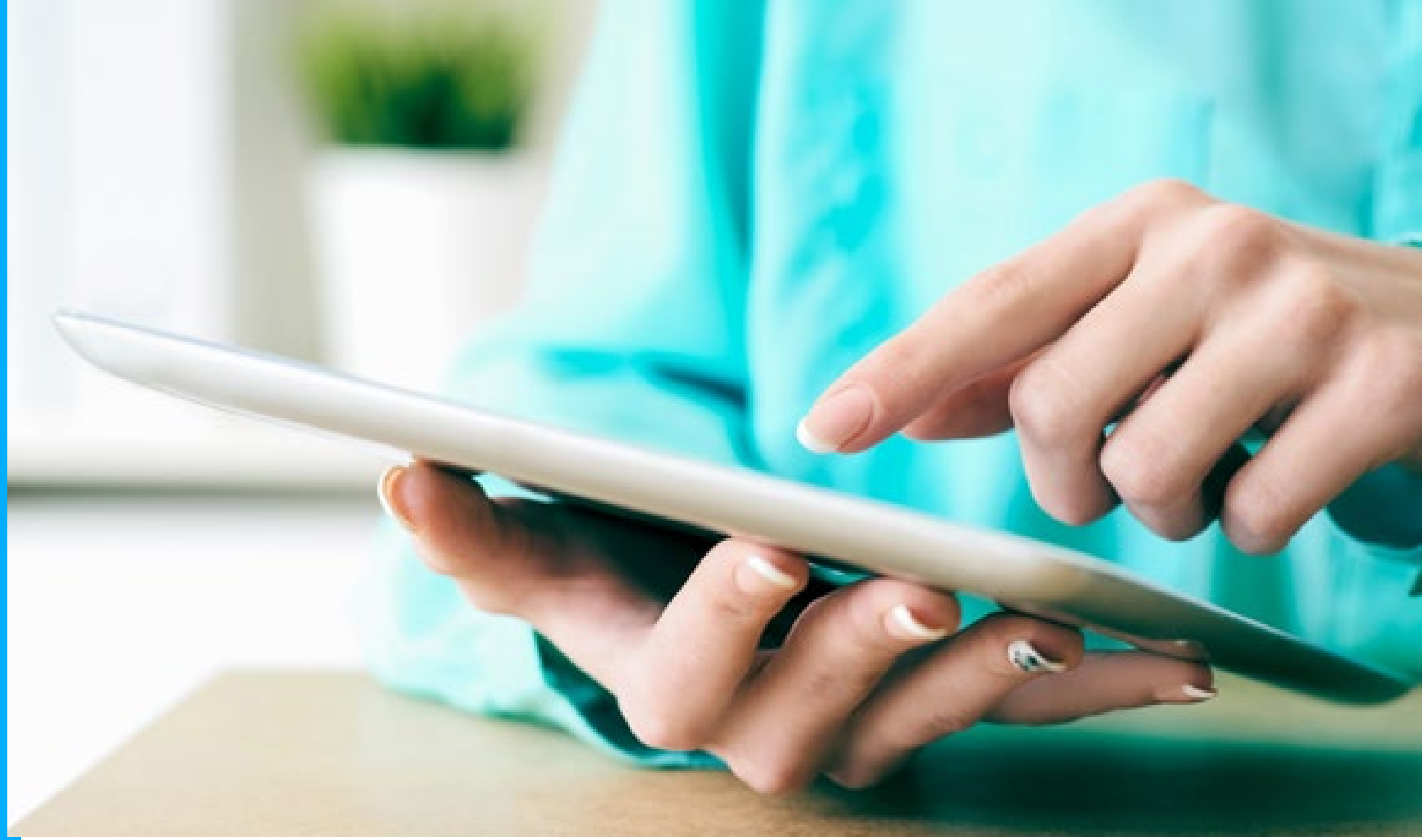
2. **Mobile access**– More than two-thirds of the partners consistently access a partner portal while they are away from their desk. So, while it is easy to make your portal mobile-compatible, don't forget to make the rest of your portal smartphone- or tablet- You don't have to go all the way in building apps for your portal. Many vendors have gone far down the app route, and it has turned out to be a pretty wasted investment, as very few partners click through all the apps. So, while apps can work as a Band-Aid to push out some news streams, events, training, etc., don't get bogged down: focusing on the broader issue of easy mobile access is the key.

3. **Personalization** – Your partners must be able to pick and chose the content they want to see in your partner portal. To start with, the portal should allow partners to filter out content that is not relevant – by region, country, or partner tier type using content tagging, but partner portals should also provide focused content to specific groups of partners by function, g. sales, marketing, or technical. The more streamlined the information in your portal, the easier it will be for your partners to use. At ZINFI we see that more than 70% of vendors are still using a flat, or non-targeted content profile in their partner portals, which is overwhelming for most partners.

4. **Simplifying promotions** – Vendors with multiple product lines are constantly running a wide variety of promotions via their partner portal. However, if the partner doesn't see a logical connection to the vendor initiatives, and furthermore if the promotions are not related to the differing maturity stages of the partner, then you are anesthetizing the channel with an avalanche of information that has nothing to do with them.

5. **Tracking metrics** – We are now in the age of content marketing. This means that it is the value your partner portal brings to the channel is dependent on your understanding of what content is useful to specific groups of partners, and what isn't. Yes, you need a dynamic partner portal content management capability, without which you cannot serve up the right content to the right partner. For a vendor with global reach, this may require an incremental investment of a few thousand dollars per month, but within a few months you are going to reap significant benefit from your partner base by stimulating them to self-educate, improve their knowledge and manage better – all because you will be able to identify how to help them based on data, rather than on opinions or anecdotal feedback.

The great news is that you now have a choice of best-in-class partner portal content management systems that you can deploy to migrate your partner portal piece by piece. This doesn't need to be a multi-year program, nor does it need to be one mammoth effort. If you take a structured approach, consecutively by functional area, you can migrate your portal gradually. Quarter by quarter, you can take one function of your organization, undertake training and move all of the relevant content over. If you do that over a period of a year you can migrate pretty much your entire portal without undue complexity. As you do this, you are guaranteed to see substantial improvements in partner engagement and satisfaction with your partner portal, which in the end will drive more revenue at a lower cost.



13 Why User Interface Matters for Partner Portal Software

Selling through the channel is not easy. It's not just because the partner organizations don't report to your team members directly, but also because there are many business drivers that you need to align to make things work for you and your partner organizations. One result of this complexity is that most companies tend to focus on partner relationship management in a tactical way, but forget that many of those interactions actually happen via their partner portal software. This is why the actual user interface of the partner portal software matters a great deal.

You must be asking, really? Why does it matter? Well, let's put things in perspective. Your partner portal software is your 24×7 digital support person who can support not just one but many partners in a dynamic way to address their questions about pretty much everything, whether it's channel programs, incentives, lead management or marketing campaigns. If you set up your partner portal software with the right programs, content and incentives, it can truly deliver those elements of your channel programs to your targeted partner base on a non-stop basis. So, while you may think of it as just a portal, it actually could be substantially more than that—if it isn't already.

Now once you accept the premise that your partner portal software is actually the digital version of your channel support team, then you have to think about how that interaction and engagement happens. When your partners log into your partner portal software to find something, how does that experience work? Do they have to go through multiple clicks and searches? Do complications in the navigational structure make it difficult for them to find what they want? Or is your partner portal software's user interface so intuitive that partners can run a simple search and find everything they need in one or two steps?

Here's another way to think about it. Imagine you call one of your vendors for support and it takes forever for you to get to the right person who can help you with some very basic question, like how much something costs. Would you be happy with that response from your vendor? Probably not. The same exact dynamic applies to your partners and the partner portal software they use. If the partner portal user interface is not intuitive and not easy to use, if partners are unable to find what the need quickly and easily, it can be very frustrating.

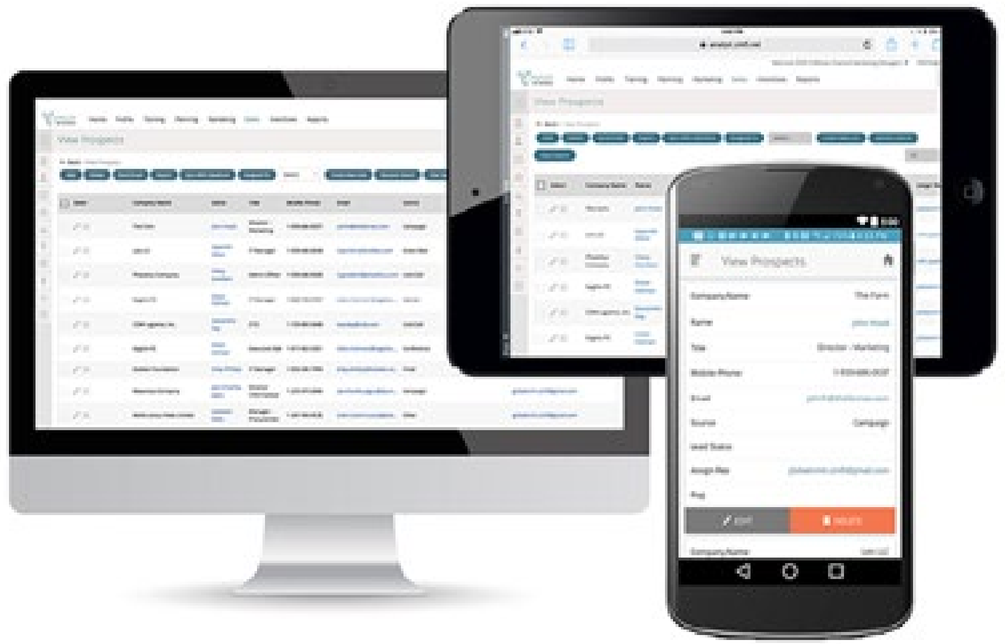
Sadly, this is the reality more often than not.

Many of today's partner portals have been designed using partner portal software from a decade or so ago—maybe even a couple of decades ago. Keeping that in mind, think about the user interface of your mobile phone: How did it look and function 10 years ago? How does that interface look now? Do you see what I'm getting at? If your partner portal software is running on an archaic user interface that is clumsy and clunky and slow, chances are your partners won't use it. That means you are missing out on a huge opportunity.

Today, leading vendors like ZINFI provide state-of-the art partner portal software platform that can rip and replace your complicated partner portal infrastructure and provide a partner experience that is mobile-responsive and highly intuitive—just like your current phone. And the great news is that a partner portal software system from ZINFI can not only provide a great experience for your partners and increase partner satisfaction, but also can reduce your own management and operating costs substantially. How is this possible? Just think about it—your mobile phone today has a thousand times the capabilities it had 10 years ago, even though it probably costs less. The same thing is true of advanced partner portal software.

So, as you try to figure out how to drive your partner productivity to a higher level, make sure you have mobile-friendly, easy-to-use partner portal software in place. If you don't, who you gonna call?

> *"How did it look and function 10 years ago? How does that interface look now? Do you see what I'm getting at? If your partner portal software is running on an archaic user interface that is clumsy and clunky and slow, chances are your partners won't use it."*



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14 Why Your Partner Portal Needs to Focus on Sales Enablement

If you are selling through the channel, your partner portal is a primary way of staying in touch with your partner base and keeping them informed of your latest offerings, your marketing and sales programs, and any incentives you are currently offering. However, too much content and program information can easily drown a partner portal and make it difficult to use. In this article we will explore why your partner portal needs to focus primarily on sales enablement, making sure all programs, tools and other content align with the core objective of helping partners sell more.

Sales enablement is changing rapidly. We are transitioning from sending a bunch of literature to partners via "snail mail" to providing online training, documentation and support. Despite this transition, however, most partner portals are still antiquated. They tend to rely on a patchwork of toolsets from multiple vendors, and are hard for partners to navigate as they look for relevant content. Moreover, when a large vendor organization (generating, say, a few hundred million in annual revenue) acquires smaller organizations, too often the partner portal content from different organizations is poorly integrated if at all, leaving partners to figure out what happened in the transition from the old interface to the new one.

With this in mind, I'd like to talk about two primary requirements vendor organizations should think about seriously with respect to leveraging their partner portal as a sales enablement tool: the need to think about your partner portal as a digital 24×7 support tool for ongoing business, and the need to map the transition for partners who have just been acquired.

First things first: Let's talk about how the partner portal needs to be organized to support partners from a sales enablement perspective. When it comes to informing your partners of day-to-day news regarding strategic programs, your partner portal content management system needs to be highly flexible and fluid to allow you to categorize and tag content in a dynamic way. In most cases you need to make sure that several core content management capabilities are in place:

1. **Partner portal page content:** It is essential to make sure when sales people log in they are able to access the sales zone rapidly and easily, and not get lost in marketing, technical and other solutions-centric content. While you may want sales people to go through product training and other modules, the majority of the partner portal page content needs to be focused on helping the partner sales reps find relevant information quickly.

2. **Documents, assets and collateral:** All sales reps, new or experienced, need to have access to the right sales documents, presentations, data sheets, case studies, etc. as they need them. During the sales process (which ideally parallels and supports the buyer's journey), the sales person needs to know what materials to send prospects at each stage of the selling/buying journey. If you dump all content into a single category, that doesn't help the salesperson figure out how to find what they need for discovery vs. lead development efforts.

3. **Refresh and reload:** Too often partner portals are loaded with stale content. We often hear this from the channel partners we work with. It is essential to have an integrated product and service release process where old content is retired in a timely fashion and is tied directly to the discontinuation of products and services. Likewise, new content needs to be introduced in a way that coincides with new launches. For all this to happen effortlessly, the content management capability of your partner portal platform needs to be state of the art.

Now, once you have a core motion in place that enables partner sales reps to leverage the appropriate portal page content, documents, assets and collateral, the next conversation you need to have should focus on any acquisitions you may have made. Too often, organizations simply turn off the partner portal of the acquired organization and then switch it over to their existing portal. This can be quite confusing for partners of the acquired organization. The best way to address this is to build a "How to Find" welcome area for those partners in their old portal, and then—leveraging identify-based access—lead them quickly to places in the new portal where they can find relevant content.

The partner portal should not be confusing for sales people. Instead, it should enable them to easily find relevant and informative content that actually helps them close a deal. Next-generation platforms like ZINFI's partner relationship management (PRM) solution come with a state-of-the-art, enterprise-ready partner portal content management capabilities. Whether you select ZINFI or another provider, if you keep sales enablement at the center of your selection process, you can't go wrong with your partner portal deployment.

15 Partner Portal & Lead Management: Two Peas in a Pod

For organizations selling through the channel, it is essential to make sure the indirect sales force—i.e., channel partners—has the tools it needs to drive revenue growth. To accomplish this, vendors that depend on partners to drive sales growth must provide lead management capabilities via their partner portal.

Partner portals have been around since the dawn of Internet—almost 30 years ago. Lead management became a core focus for most vendors around the same time. However, the tools necessary for dynamic lead management within the partner portal haven't been available for channel-based organizations until recently.

While there has been a proliferation of various lead management capabilities for direct sales, those same capabilities have been relatively limited for partner-based sales. Many vendors have made considerable investments in developing their partner portal, but until recently most haven't bothered to look for integrated solutions where lead management is an integral part of the partner portal. That scenario is changing rapidly, however.

> *"Lead management became a core focus for most vendors around the same time. However, the tools necessary for dynamic lead management within the partner portal haven't been available for channel-based organizations until recently."*

A few years ago, partner relationship management (PRM) software providers like ZINFI began to introduce fully integrated lead management and partner portal capabilities whereby a vendor can set up a fully dynamic lead generation and management program.

While lead management has been a core capability for years for most CRM vendors, so far very few PRM vendors have been able to master this capability. ZINFI has broken this barrier. It has introduced purpose-built, easy-to-use lead management capabilities that fully integrate with all the necessary features of a partner portal. And this includes seamless integration with major CRM providers like Salesforce, SAP, Microsoft, Oracle and Zoho.

Any state-of-the-art partner portal today offers features for documents management, asset management, marketing campaigns, incentives and various other components related to a channel program. However, if the partner portal is to be a true destination site for the partner base, it must also offer lead management capabilities that are fully integrated with these other software modules.

We see it every day: Organizations deploying state-of-the-art partner portals with integrated lead management capabilities are benefiting significantly from the impact of this integrated usage model. Their partners are able not only to efficiently process leads vendors provide but also generate demand on their own—and vendors are able to easily keep track of the entire process.

> *"ZINFI has broken this barrier. It has introduced purpose-built, easy-to-use lead management capabilities that fully integrate with all the necessary features of a partner portal. And this includes seamless integration with major CRM providers like Salesforce, SAP, Microsoft, Oracle and Zoho."*

16 How to Use Social Marketing to Increase Partner Portal Usage

Every organization selling through a network of partners; be they resellers, system integrators, agents or franchise holders, struggles with partner engagement. And, one of the main areas of challenge for them is to make a partner log into the partner portal for content consumption and program awareness. There are multiple reasons why partners don't use a vendor's partner portal (please see our earlier article on How to Make Your Partner Portal More Partner-Friendly); however, there are simple techniques that you can use to increase partner portal access by multiple folds. One of the main techniques that is underused, or not used consistently – is social media marketing.

While most organizations selling via a channel tend to use social media, our conclusions after observing multiple deployments are that social media is more often treated as a mechanism for publishing snippets of information rather than a holistic medium for partner engagement and marketing. The use of social media in the B2B space is fundamentally different from how it works in the B2C space, because of one primary issue; lack of available time for content consumption by the target audience. Most vendors tend to push news and other types of content via Twitter, LinkedIn, Facebook and even sites like Pinterest but the key to increasing partner portal adoption is to make sure there is a holistic publishing strategy. This is how it works.

Assuming that an organization has an overarching strategy for using social media for end-user marketing (both in the B2B and B2C spaces), and since content marketing has become the de facto norm today, it is important to ensure that your strategy for driving partner portal usage is integrated within your overall plan. There are a few simple ways of doing this.

1. **Segment content** – Channel partners may follow an organization through various channels on the same social media sites, so you need to avoid mixing different types of information in your feeds. For example, if you use Twitter to promote company news and events, you need to make sure you don't muddle this channel by delivering technical or product releases, bug fixes, or other tactical announcements that you have already posted in your partner portal. Also, if you have inbound engagement via any of the channels related to support, partner or customer complaints, it's essential to direct that conversation to the correct social media site, for example to your customer support portal. Actively managing the type of content and where it's viewed is a critical part of segmenting content appropriately, and driving relevant traffic to your partner portal.

> *“It is important that you only promote English-language content where it can be understood, and local-language content only in the appropriate country channels. It makes no sense to push an English-language globally when you know very well that in certain countries like China, Japan or Korea it will be wasted.”*

2. **Localize engagement** – Partner portal usage tends to be highest in the English language, partly due to the prevalence of English in the technology industry but also due to lack of localized interfaces and content for non-English-speaking countries. This assumes you have picked the right partner management platform (please see our earlier article, Must-Haves for Your Partner Portal). It is important that you only promote English-language content where it can be understood, and local-language content only in the appropriate country channels. It makes no sense to push an English-language globally when you know very well that in certain countries like China, Japan or Korea it will be wasted. This thoughtfulness is critical in making sure that the reach of social marketing is not abused and engagement is strategically planned and managed.
3. **Reduce overload** – Not every news item or sales program is relevant to partners, so they don't all merit a push via social

media. Selecting what's critical to know and strategically valuable in social media engagement is crucial if you want to rise above the noise. So, if you have a big announcement – like a company acquisition, major new product launches, or mega price reductions, use social media to push that news out and drive traffic back to your partner portal. However, if you want to promote a roadshow in one city or country, be selective about how you use social media for such tactical engagements. To run a location-specific promotion, you are better off using traditional tactics like email or telemarketing to drive partner registration.

4. **Track engagement** – The great news is that today, if you have a state-of-the-art Partner Relationship Management platform, then you will be able to track partner portal metrics in great detail. You should be able to see where the traffic is coming from and what they are doing in your partner portal. Just as your corporate marketing team drives content marketing for broader lead generation, there is now an opportunity to do the same in channel marketing – provided you have an integrated strategy and the right tool for engagement tracking.

5. **Refine to scale** – Once you have segmented your content, provided it in a localized environment, managed conversations to make them relevant, and understood what is working and what needs work, the next step is to refine and scale globally. It can't be done overnight, so there's no need to be impatient. Lay out a multi-quarter plan and strategize step-by-step execution over a couple of quarters, and you will see more traffic to different parts of your partner portal because your channel partners are more aware and being engaged via a variety of social media-centric inbound channels.

Partners will only engage with your partner portal if they need to. So unless what drives them to your site is about support, or checking licenses or other business-driven needs, if you are to have a hope of bringing them back to your portal to learn about new products, training, promotions, or other information, you have to pick the right way to communicate. Outbound communication has dramatically changed over the past decade, and more rapidly during the past five years. We have observed among our vendor client base that, when an organization uses social media marketing effectively to communicate to their partners, they can increase inbound traffic to appropriate sections of their portal much faster, and significantly grow overall adoption.

I would love to know how you are using social media marketing to drive partner engagement and what you think is working or not. Please share openly if you can.

17 Core Metrics for Your Partner Portal Software

Most organizations selling through the channel have deployed some sort of partner portal software. If there are many partners doing many things, then the partner portal may be quite full of capabilities. On the other hand, if it the partner portal is supporting just a few partners, it may simply be a tool for exchanging documents. In this article, we will explore which metrics you need to track to measure the effectiveness of your partner portal software and make sure it is fulfilling its potential.

Before we begin, let's step back for a moment and ask why you should even bother with metrics when it comes to your partner portal software. Well, there are actually a few reasons, especially if you are selling through a broad channel. First, the purpose of your partner portal for many organizations is to make information—about products, programs, pricing, training opportunities and so on—available to your partners. Metrics allow you to track the usage of that information and make sure your partners are getting and using that information. Second, you may want to personalize your offerings to partners, so that only certain information and assets are available to certain kinds of partners. Tracking metrics can help you make sure the breadth and depth of your partner portal content doesn't overwhelm and confuse your partner base. Finally, you may want to use your partner portal to connect various types of partners on the basis of experience, expertise and other characteristics to build an ecosystem-like environment where partners learn from and help each other.

The three scenarios that I have described here barely touch the surface when you consider how partner portal software can be configured to address business needs. But these three examples can provide instructive examples of useful metrics that your partner portal software should be able to provide.

When it comes to business process automation for organizations selling through the channel, partner portal software is the first and almost always the only "handshake" an organization can have with its partner base. A partner portal never sleeps, so a partner can always access information and the assets they need to carry out a business transaction. Therefore, one of the most fundamental partner portal software metrics you may want to track is usage—who is using it and how frequently. You may also want to know which particular assets are being used the most by partners, and you will probably find it helpful to segment that data by partner type, size, geography, etc. Such usage metrics can provide valuable insights to your marketing and sales team, and ensure they load your partner portal software with the right types of marketing and sales assets for the right partners.

Another dimension you can easily measure is partner productivity. If you carry out sales transactions via your partner portal, then your partner portal should allow you to track sales pipeline development and deal registration. Deal registration is quite common in enterprise sales where multiple partners may be trying to sell to the same end-customer. In those situations it is essential for a vendor to be able to protect a deal for a specific partner. You may also want to track partner sales productivity by the market segments, transaction types, deal types, programs and so on that a specific partner or a group of partners is involved in. The ability to measure productivity is a core capability your partner portal software must have.

In addition to tracking asset usage and partner performance, you may also want to figure out which training programs you offer are most effective and which partners are using them. Your partner portal software should be able to track results across various training programs, partner types, locations, sales volume and similar variables. This is how you can build a true input and output model. These days, organizations often provide incentives like sales rewards, rebates and market development funds to certain partners based on their competencies and performance. This is a correlation that your partner portal software should be able to provide, and tracking such relationships will help your channel marketing team understand which incentives are most effective and why.

I could keep going and discuss various other dimensions of performance and activity tracking, but the details would vary greatly from industry to industry. A core set of metrics should apply across most verticals, and those are the measures I have discussed here: portal usage, asset usage, partner performance by programs, products and training, as well as various incentive programs tied to partner competencies and performance. These are the core metrics you should consider tracking for your partner portal software, regardless of the industry or vertical you sell to or do business in.

18 Your Partners Are Mobile—What about Your Partner Portal?

Believe it or not, in 2018 most vendors selling through the channel have partner portals that were built with technologies from decades ago. In fact, Al Gore could claim he built your partner portal at the same time he invented the Internet! It doesn't have to be this way. You and your partners deserve better.

Now, if you ask what part of your partner portal needs to be mobile, the short answer is "everything." Yes, everything. There are some vendors today that offer some web content in a mobile-responsive mode, but when it comes to core applications like lead management, incentives management, deal registration, marketing activities and sales assets, vendors tend to keep these functions in the "old" technology platform. That means they are effectively restricting access to core functionality and perpetuating a cumbersome user experience that is relevant for desktop only.

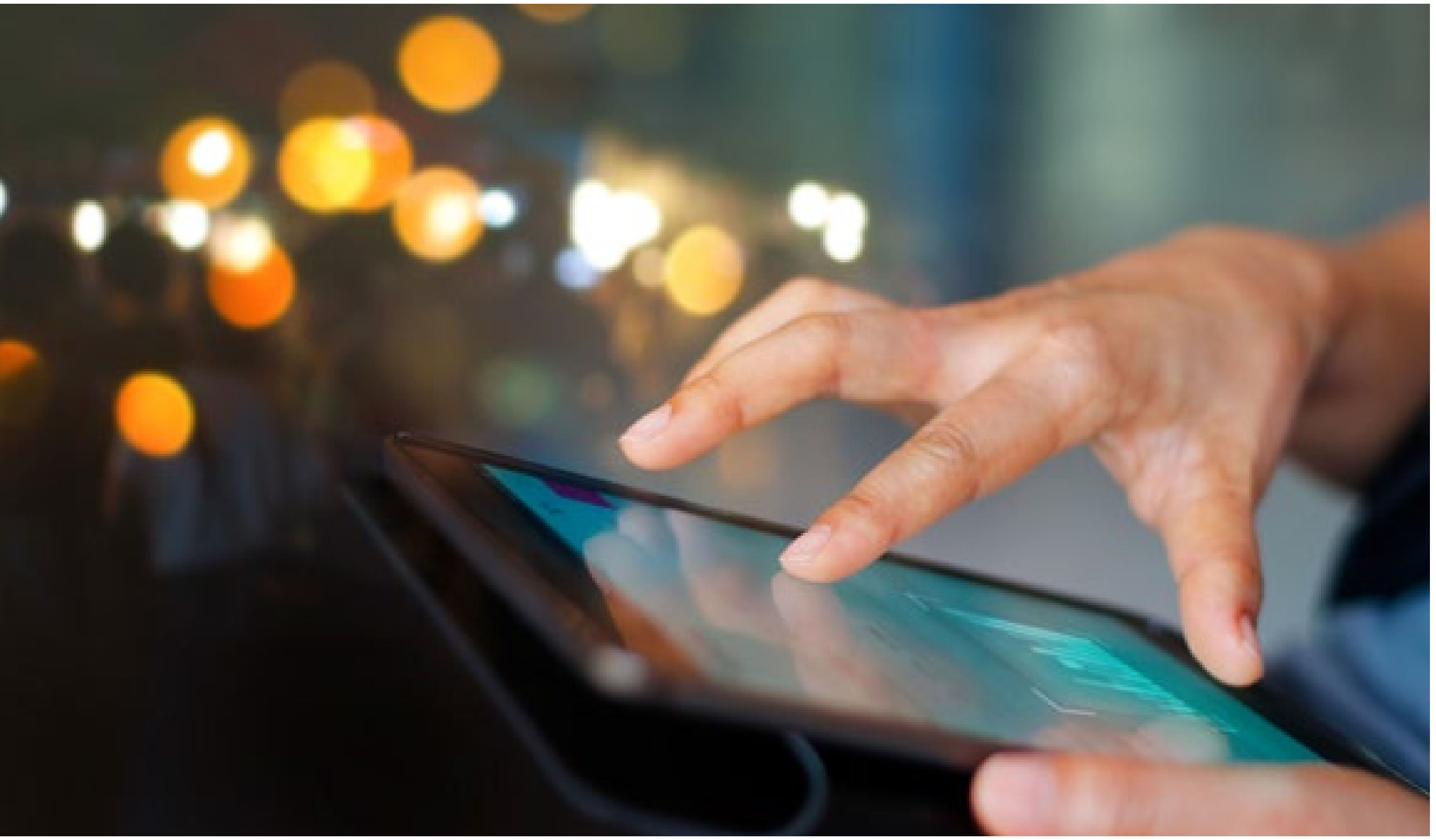
There is at least one exception, however. With the most advanced partner portal software platform in the marketplace—a key component of ZINFI's Unified Channel Management solution—you can not only make your entire partner portal experience mobile responsive, but also put that entire experience inside your partner's mobile device via a native application. This drives up activity via the partner portal, particularly when it comes to partners accessing news and product information. It also makes your partners more productive. For example, they can use a mobile device to apply for market development funds (MDF) or submit a claim or register a deal—and they can perform these tasks whenever and wherever it's most convenient and relevant to do so.

Your partners are generally incredibly busy people. They are rarely sitting around in the office. Instead, they are constantly up and about, dealing with dozens of vendors, performing various lead generation and sales activities, and fulfilling requests. It is almost impossible for any of these people to remember all the little things they have to do when they get back to their office. If you send them an email, they may open it while they are sitting in the reception area at their customer's office, but then the meeting starts and they forget to respond to that email. However, if your partner portal is entirely accessible via a native mobile app, your partners will get an alert, and they will be reminded to open the email when they have a few spare minutes—while they are getting gas on their way back to the office, say—and they will be able to respond then, when it's most convenient.

Partners want to win for themselves and for their vendors, but the time they spend at their desktop keeps them away from their customers. An exclusively desktop-based partner portal limits their access to crucial information and inhibits their productivity. It makes it harder for them to respond to your messages, to learn what is going on with your channel programs and to participate in the activities that should be engaging their attention.

So, if you are wondering how to drive up productivity among your partners, the first thing you should consider is converting your partner portal into a mobile friendly, easy-to-use application. Can you afford a mobile technology platform like the one ZINFI provides? You would be surprised. For as little as a few cents per partner per month, you can not only create a better and more productive experience for partners—you can actually cut overall costs related to portal development, management and maintenance, while driving up revenues with the help of a group of highly productive, motivated and happy partners.

> *"An exclusively desktop-based partner portal limits their access to crucial information and inhibits their productivity. It makes it harder for them to respond to your messages, to learn what is going on with your channel programs and to participate in the activities that should be engaging their attention."*



19 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.

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.

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.

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.

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.

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.

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.

Centralized Interconnection (CENTRi™) Management
The Centralized Interconnection (CENTRiTM) 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.

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.

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.

Affilate 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.

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About ZINFI

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

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

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

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

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