



Multi-Partner Demand Generation 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 multi-partner demand generation best practices. We at ZINFI have been privileged to work for a number of Fortune 1000 companies worldwide over the past decade, and we are proud of the work we've done to drive their channel programs globally. In the process of doing that work and conducting ongoing discussions with customers, we have learned a lot about the key challenges of multi-partner demand generation initiatives: why they often fail, how the right tactics can help them succeed, and how an intelligent approach to automation can simplify and streamline workflows and generate healthy returns on your investment in programs and technology. This booklet is a summary of those lessons learned.

Well-planned, well-executed multi-partner demand generation programs can generate ROI in excess of 20 times the original investment. Yet, many partner marketing programs struggle to get off the ground, particularly when they are aimed at partners who sell products and solutions from multiple vendors. This guidebook will give you practical advice designed to help you engage partners and keep their interest, simplify campaigns, align programs by partner type and competence, provide concierge services to partners who lack resources, enable partners with workflow automation, identify key metrics for success and measure ROI.

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

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

Sincerely,

Sugata Sanyal

CEO and founder of ZINFI Technologies



How This Book Is Organized

This booklet is divided into three sections. Section I provides a brief introduction and a letter from ZINFI's CEO. Section II presents a series of articles that focuses on the challenges of multi-partner demand generation and provide insight into why many initiatives fail. Section III offers detailed advice on deploying integrated tactics, including search marketing, social marketing and email marketing. Section IV focuses on automation of partner marketing workflows, and gives valuable advice on evaluating platforms and rolling out an automation program in the most effective way. Finally, Section V introduces ZINFI integrated solutions that together comprise its Unified Channel Management platform: Partner Relationship Management (PRM), Partner Marketing Management (PMM), Partner Sales Management (PSM) and Global Marketing Services (GSM).

The lessons and best practices in this booklet are based on years of close work with customers who use our channel marketing automation systems on a daily basis and are constantly refining their partner marketing practices to increase partner engagement and increase ROI.

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

Enjoy!



1 Why Partner Marketing Fails Most of the Time

For those who are selling through the channel, partners can be a great asset for an organization to depend on. Companies and vendors that target both consumers and businesses require partners to market. When it comes to franchise businesses, especially in the retail world, marketing is an inherent component of demand generation. As a result of that, most companies selling to consumers via a channel partner network tend to do a better job than those companies that try to sell either directly to the consumer or to businesses that carry multiple products and solutions. Single-product or single-brand franchises are good at marketing, but multi-brand product and solution partners, whether they are resellers or franchisees or something else, tend not to be great promoters of a specific vendor's product. Millions, even billions, of dollars are spent on various types of local, regional and national marketing, including search, social, email, events, telemarketing and so on, but the ROI is highly questionable, and most vendors really struggle to engage their multi-product and solution partners in an effective way.

Eight challenges to successful partner marketing

So we know that partner marketing to multi-product partners is hard. But why is that? Let's take a detailed look at some of the challenges vendors face in this context:

- 1. Lack of control.** Partners, resellers, etc. don't necessarily report to vendors they are selling for, especially if they are selling multiple product lines. If they do not depend specifically on a single vendor for a significant portion of their revenue stream, they are unlikely to focus on that vendor all the time. Also, partners tend to behave more like customers than indirect employees or contractors who an organization can control more easily.
- 2. Misalignment in priorities.** Channel partners selling multiple products and solutions have their own priorities. On average, multi-product vendors will carry between five

and fifty products lines and solutions. In that case, partners tend to focus on the handful of products and solutions that drive most of their revenue. Very rarely do they focus on the secondary or tertiary products and solutions that may complete their portfolio. Knowing this, each vendor is calling partners on a regular basis to urge them to market and sell their product. The partners, in turn, tend to engage with the vendors from whom they get the most support.

- 3. Lack of marketing resources.** One of the reasons that some partners do not do a good job of marketing is that they lack marketing resources. When that's the case, partner marketing isn't really happening. Many partners do not have the skillsets and resources to market in an effective way using structured steps and processes. Also, most partners do not have marketing automation systems in place. Because of that, it's virtually impossible for them to perform multitouch, integrated marketing on their own to generate demand in the short term and generate brand awareness in the long term.
- 4. Short-term quarterly focus.** Except for the few large partners that have reliable planning capabilities in place, most partners tend to focus on short-term, tactical activities, and lack the resources and planning skills to map out multi-

quarter marketing campaigns. As a result, most marketers end up turning to event marketing or telemarketing for lead generation. In today's content marketing-based lead generation environment, those tactics generally fail to generate enough ROI to be worthwhile.

- 5. Changing targets.** Many vendors give up too quickly and change programs, thinking that by introducing new programs they can stimulate partners to go out and market. But the real challenge is not a lack of programs or tools or assets on the vendor side. It's really consistency that the vendor most needs—and often fails—to provide in an integrated way on a multi-quarter basis so the partner is not changing horses every quarter. This longer-term, more consistent approach when putting together campaigns is critical for vendors to be successful in an environment where a vendor is selling multiple products.
- 6. Cumbersome funding process.** Most vendors that are supporting partners carrying multiple product lines and want to encourage partner marketing activities provide market development funds (MDF) or co-marketing funds. However, the process to claim funds is typically quite complicated. Surveys we have seen indicate that 70% of partners actually don't know how to get MDF from their vendors. It's



astonishing how high these numbers remain—even for top-tier partners who generate a significant portion of their revenue from one or two core vendors, as many as 45% don't know how to receive MDF.

7. Lack of marketing help. Since most partners do not have in-house resources and lack the ability to plan and execute multi-quarter campaigns, if a vendor is not providing partner marketing help in the form of partner marketing concierge services, it's likely that the partner will not engage with this specific vendor. Even more than the introduction of system automation or other tools, partner marketing concierges services represent the most important investment a vendor can make to effectively reach out to a group of partners and promote a set of campaigns and programs, discuss incentives that are available and drive execution through outsourced help. We see this repeatedly across all countries. Small and large vendors that make a logical set of investments in partner marketing concierge services before investing in marketing automation or channel marketing automation for their partners tend to realize much better ROI, and in a focused way. Of course channeling marketing automation is important. But without a proper alignment and deployment of partner marketing concierge resources, partners rarely engage sufficiently to drive results.

8. Failure to develop technical and sales competencies before promoting marketing activities. A partner company will typically comprise multiple individuals from sales, marketing, technical support and other departments. When a vendor is putting a marketing campaign together, too often it's built in isolation from other related activities and not fully aligned with the incentive structure. Simply pushing a marketing campaign to a partner is not necessarily helpful, particularly if the partner doesn't have trained salespeople and the technical resources to execute the campaign. Most vendors, when they launch a new product, make a fundamental mistake by immediately promoting the product via marketing campaigns, kits, etc. But that may be putting the cart before the horse. In reality, partners need to start with technical training, then move to sales training. Then and only then do they invest in marketing activities. For partner marketing to be successful, the vendor needs to have a multi-quarter approach in which they help build technical and sales competencies first before they push partner marketing activities in an aggressive way. During this phase in which partners are developing technical and sales competency, the vendor is much better off outsourcing lead generation activities to a third party and feeding the partner qualified leads so the partner can go build sales competency first before engaging in marketing activities.

“Partners need to start with technical training, then move to sales training. Then and only then do they invest in marketing activities. For partner marketing to be successful, the vendor needs to have a multi-quarter approach in which they help build technical and sales competencies first before they push partner marketing activities in an aggressive way.”

Solutions

What are the key steps an organization can take to address these challenges? There are seven specific actions a vendor can take:

- 1. Simplify marketing campaigns.** We've already talked about the critical importance of picking the right set of campaigns in an integrated way with sales and technical training to make sure partner marketing activities don't lose steam.
- 2. Align by partner type.** This means providing the right set of campaigns depending on whether the partner is a small or medium-size business (SMB), mid-market, enterprise. Or perhaps there are partners selling into multiple verticals like finance, real estate or manufacturing. It's critical that the partner portal allow segmentation of these campaigns into multiple areas so a partner can search for and find the campaigns that are relevant for their competency level. Partners are busy and don't have time to wade through a plethora of campaigns and then fail to find what they are looking for. Search is a core capability that the vendor must provide. If a partner does not have marketing automation in place, then marketing concierges should be engaged to help make the process of finding campaigns that align properly with the partner type easier.

3. Provide automation for free for all partners. If a vendor is selling to both B2B and B2C partners through a large channel, it is almost impossible to provide an equal level of marketing support to all partners. If that's the case, it's important to provide a channel marketing automation platform that all partners can use consistently. In a previous article, we have discussed the key features a channel marketing automation platform must have. We won't go into that here. But the platform the vendor provides should also be able to segment content so that, for example, SMB partners have access only to SMB campaigns, mid-market partners have access only to mid-market campaigns and so on. And this platform should be provided free of charge to all of the partners so that it's not just the top-tier partners who can execute campaigns. Free automation also ensures that a vendor whose channel has a long tail, where there are some partners do not sell regularly, will also be able to enable those partners to run a campaign here and there, so vendors can drive up collective ROI significantly.

4. Provide concierge services for free (for selected partners). It's essential to provide these services for free to top-performing partners and partners that have the potential to grow revenue. Without this support, partners may have the perception that it's difficult to do business with the vendor.



Whenever we do surveys and probe deeply about customers doing business, we consistently find the number one factor in making partner marketing easy is the availability of partner marketing concierge support.

5. Measure ROI. Without a dynamic channel marketing automation platform that can track a specific campaign being executed by multiple partners—maybe even hundreds or thousands of partners on a global basis—it is virtually impossible to know how a campaign is really doing. Again, a channel marketing automation is critical to provide and track ROI, and it must be done at a highly granular level so that vendors can dynamically determine what specific products and services should be used for partner marketing campaigns.

6. Reward successful partners. While most partners have annual partner exchanges and events where high-performing partners are rewarded in a large or public forum, the best way to increase engagement on a day-to-day basis is to continue to promote partner success on a regular basis. This may take the form of videos or case studies, or it may be a matter of hosting online rewards events where a

certain partner in a certain category is rewarded for sales performance or technical competency. Whatever the form the reward takes, it should always be tied directly to partner marketing activities.

7. Celebrate success. We've already established that rewarding successful partners is important. But it's equally important to make the celebration process an integral part of the overall channel management activities. This will ensure that all partners become aware of how certain partners are becoming successful. It also allows a vendor to replicate success easily and across multiple partners and geographies rapidly. This is another area in which partner marketing concierges can help: They can learn from one partner, promote the success of that specific partner, and then enable additional partners by following steps and methodologies that are actually working.

Partner marketing is never easy when a partner carries multiple product lines and is not focused on a specific vendor. However, when a vendor takes a structured approach and recognizes the challenges that get in the way, partner marketing can drive significant ROI, expand reach and drive revenue consistently, and in a scalable way, across multiple geographies.



2

What to Do about Two Core Challenges of Partner Marketing

Selling via a network of channel partners is especially hard, because partners don't report to vendors and most partners don't have processes and people in place to have truly effective marketing capabilities. However, an organization that has the proper structure, programs and processes in place can build a decent run rate business via the channel. In this article, we will explore briefly a couple of the most fundamental challenges specific to partner marketing and what an organization can do about them.

Let's focus on two core problems: when partners don't have marketing processes, and when they don't have the resources to build a sustainable marketing motion. But before we jump into solutions, maybe we should ask, "Is it really that important to have marketing processes and resources to build a partner marketing motion?" The short answer: very, likely yes. If you are relying on your partners simply to provide services and pure fulfillment, then it's possible their marketing abilities are less of an issue. This scenario typically applies to consumer insurance and a few other segments. In the case of insurance, it's really

“The great news is that once a vendor selling through the channel addresses these two core gaps on the partner organization side by providing partner marketing concierge services and a partner marketing automation platform, a significant portion of the partner marketing challenges get solved—and not just locally, but also globally.”



the provider that drives all of the marketing, while the insurance agents handle fulfillment and customer service. However, in most other segments like retail, real estate, financial sectors, technology, and manufacturing, partner marketing motion is absolutely necessary to build demand.

Now let's explore how an organization can bridge these two fundamental gaps—i.e., lack of partner resources and lack of marketing processes.

- **Lack of resources:** You cannot implement a process without resources, so the fundamental challenge in partner marketing is how to enable partners to do marketing on their own. There is really only one answer—provide partner marketing concierge services to partners who can sell but cannot generate demand on their own. The key here is to focus your efforts and resources only on those partners who have demonstrated they can close a transaction when a proper lead is given to them to pursue, but do not have the internal resources to drive marketing and generate leads on their own.
- **Lack of processes:** Once you have provided a partner with some marketing concierge support with specific goals and objectives in mind, the next step is to provide marketing capabilities via a partner marketing automation platform.

This automation platform needs to come with all the pre-built campaigns, assets and tactics that partners need and can easily use by leveraging their existing administrative and sales resources. There should also be incremental support focused on making the most of the platform from partner marketing concierge services.

These two solutions may sound simple, but it is surprising to see how many vendors selling through the channel do not align their existing budgets to make these two basic things happen. The great news is that once a vendor selling through the channel addresses these two core gaps on the partner organization side by providing partner marketing concierge services and a partner marketing automation platform, a significant portion of the partner marketing challenges get solved—and not just locally, but also globally.

With that said there are other dimension, such as campaign types, training, incentives, etc. that also need to be addressed in order to build a fine-tuned partner marketing machine, but we will address those in other articles and discussions. However, none of those additional measures will really matter if the two foundational criteria, partner marketing concierge support and partner marketing automation, have not been addressed in a structured way.



3

5 Reasons Why Multi-Partner Marketing Programs Fail

Large vendors selling through a complex channel with many channel partners tend to invest substantially in multi-partner marketing. They can end up spending millions of dollars locally and globally in developing campaigns, investing in channel marketing automation tools and providing concierge services. However, most of these partner marketing programs tend to fail for a few specific reasons. In this article, we will focus on what makes these programs fail and what can be done to dramatically improve the probability of success.

Before we delve into tactics associated with multi-partner marketing, let's look at the appropriate objectives of such programs. There are three primary types of objectives associated with multi-partner marketing programs:

1. Partner-led: The objective of these programs focusses on enabling a set of partners to drive demand of existing or new products that a vendor sells through the channel to end users. In these types of programs, the vendor puts together campaigns, provides multi-partner marketing automation

tools and, in some cases, allocates partner marketing concierge resources to help partners generate demand and build sales pipeline. The primary measure of success in these programs is marketing ROI generated in excess of 20X the original investment.

2. Vendor-led: The objective of these programs is to generate leads directly from the end-user base, but then use a lead management program to distribute leads to various partners who are best-positioned to nurture, develop and qualify these leads to build sales pipeline. In this case, the vendor essentially provides a lead distribution and management platform, as well as some concierge support, to help the partner build pipeline based on the leads provided by the vendor. Again, the primary measure of success is marketing ROI generated in excess of 20X the original investment.

3. Jointly led: These are co-marketing programs where the vendor works with a specific partner to generate leads by running events, campaigns and other initiatives to co-



develop, qualify and close together. We tend to see these types of campaigns in high-end enterprise segments, and the campaigns tend to be long-term and geared towards a much higher average selling price for complex solutions. These are pretty typical in technology-centric solution sales. The primary measure of success for these programs is actually sales generated from such activities.

Now let's turn our focus to the first type of program identified above—the partner-led model—where partners are being enabled and they are the ones driving pipeline development. Typically, mistakes are made when a vendor is setting up and rolling out these campaigns. Here are the main pitfalls, along with suggestions for what can be done to avoid them:

1. Campaign selection: Campaigns that work for the direct marketing team do not necessarily work for partner marketing organizations. We have discussed this in other articles. The best way to succeed in a partner marketing campaign is to pick tactics that work over a short period of time—i.e., not exceeding 30-60-day campaign cycles—and deploy tactics that are repeatable. Common examples of these are search, social, microsite, email and event campaigns, which are based on one or two touches. Multi-touch campaigns tend to fail with most multi-partner

marketing campaigns, simply because partners are busy and cannot stay focused on a specific vendor campaign or program for a long period of time. Yes, there are always a few partners who can successfully run a multi-touch campaign over multiple months, but those are exceptions to the rule. Success in the channel is about scaling simple motions rapidly from one region to another, so selection of campaigns is critical.

2. Concierge support: No matter how simple the campaigns are, partners still need marketing concierge support. Setting up a structured concierge program that is scalable and repeatable is very difficult for most vendors. As a result, most vendors do not put a lot of effort and thought into it, and just roll out a set of campaigns and campaign tools. Lack of partner adoption plagues such programs. The best way to avoid this is to set up concierge resources focused on 50-100 partners per language per quarter, and drive quarterly campaigns and results in a highly structured way. There are organizations like ZINFI who do this for a living, and a vendor will almost always save time and money by outsourcing their concierge activities to a professional organization. The ROI from such programs always outweighs the required incremental investment. Most importantly, though, is that partner satisfaction and confidence go up rapidly in partner-

“ *Proper planning, selection and focus are the overarching themes for success. There is no magic in successfully managing a multi-partner marketing program, but it does require deliberate and structured effort.* ”

led demand generation programs that are backed by solid concierge support.

3. Partner selection: If campaign selection and concierge support are set up right, the last step in creating a successful multi-partner marketing program is to select a set of partners to participate. While a vendor may have hundreds or thousands of partners in a region, it is essential to take a thoughtful approach to selecting the right partners. It is tempting to pull a random list together and go out and provide campaigns, tools and concierge support, but in most cases those efforts are wasted and do not provide the necessary return. I will discuss shortly how to select partners, but before we do that, I do want to emphasize the crucial importance of this step. In most cases, it takes a vendor at least three to four months to put together a campaign, get regional alignment, and get internal resources trained and ready to roll out such a program. However, if the vendor hasn't properly planned partner selection, then not only are all of these efforts likely to fail, but the program may never get another chance because it will be perceived within the organization as a completely failed effort. So, from an organizational dynamics perspective, it is essential to win consistently from day one with a multi-partner program roll-out to build confidence within the organization and demonstrate that the program can add value and build real pipeline.

With this as a context, let's take a closer look at partner selection for a multi-partner marketing effort. While it is not hard to do

this right, vendors typically fail to spend enough time thinking this step through properly. Here are five key considerations that a vendor should consider and act on when trying to roll out a partner-led marketing effort to ensure a successful launch.

- 1. Strategy:** Partners selected to participate need to be strategic to the vendor—i.e., the program's success must be important to both the vendor and the partner. This only happens when the partner has a vested interest in the relationship, based on the volume of revenue they already generate using vendor, and the partner must have the potential to grow revenues substantially.
- 2. Competence:** The partner organization should not require product training to go market and sell, so after the marketing campaign is over their sales and technical people will be able to engage with the leads generated and develop them to build pipeline and closure.
- 3. Single Point of Contact (POC):** The partner organization needs to provide a single point of contact (POC) who can properly navigate internally through the sales team to make sure leads are being followed through and appropriate scripts, sales tools, etc., are being made available to the reps to ensure continuity from marketing campaign to sales closure.
- 4. Weekly review:** There should be a weekly joint review between the concierge service (e.g., ZINFI) and the partner organization, and it would be great if the vendor team could participate as well. If vendor team members cannot join, then concierge service and the POC on the partner side should facilitate the meeting, take notes and share discussion points with the appropriate vendor team member.
- 5. Performance feedback:** The partner organization should be willing to share detailed performance feedback from marketing metrics (email, event, etc.) to sales metrics (marketing qualified leads, sales qualified leads, deal value, pipeline value, closing values, etc.). Metrics should be clearly defined prior to campaign launch so expectations are clear.

As you can tell from this article, proper planning, selection and focus are the overarching themes for success. There is no magic in successfully managing a multi-partner marketing program, but it does require deliberate and structured effort. If a channel marketing organization follows the path I have laid out above in a logical and sequential order, then success and ROI attainment can be achieved in just about any partner-led multi-partner marketing program.





4

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

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

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

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

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

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

- 3. Initiating search optimization:** While there is value in spending advertising budget on paid search, organic search can yield much better results and broaden the funnel to include people who may not be ready to buy, but are ready to engage with your content. Therefore, when a content calendar is being developed, it is important to understand what key words you are going to focus on for the next six to twelve months – not just today – and optimize around that longer term objective.
- 4. Being socially prudent:** More is not more when it comes to social marketing. The goal is not to push random content and dilute the engagement. We need to be strategic about separating substance from noise. Substance, for example, would be a success story, and noise would be a low-priority version update announcement that doesn’t align with your overall solution marketing message. So, when you build your social marketing network, you need to be clear about how you will deploy content via each channel. Your content will drive user or reader engagement, which in turn will build your relationship with a future customer.

- 5. Optimizing the balance:** You can leverage different social marketing channels to promote solutions and products, while still mapping them to defined keywords and an overall content strategy. Make room within your plan for tightly defined tactical activities as well as more strategic, long-term communications. The one-off approach might be an email prospects to a webinar or an event or announce a buy one get one free promotion. Or introduce a weekly or monthly newsletter offering value added content to potential and current buyers. Just remember to tie in these approaches with your search and social marketing game plan. Also be sure to invite readers to sign up with your social marketing. This will increase your search engine ranking – especially when you align with your keywords strategy and content distribution.

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

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





5 Selling to IT Buyers? Pick The Right Integrated Marketing Approach

Lackluster returns from a marketing campaign are common, but understanding why this is the case is not always clear-cut. Traditionally, poor results are usually attributed to three failures – ineffective targeting, improper implementation (failure to use integrated marketing), and diffused messaging without a clear call to action. In this article we will focus on the approaches and tactics.

Marketing Automation platforms today allow any business to pick the right tactic for the right segment. Assuming you know whom to target (very important), the next step is to understand how your targets buy, and to pick the right approach for engagement.

From time to time we get calls from prospective B2B clients who just want price details and a high-level services summary. Almost every time this happens, it turns out that they are just looking for information to fill a hole in a comparative vendor chart, and we don't have a chance to bid for that deal because the inquirer

usually has already made up their mind. On the other hand, when we are able to engage with prospects at an early stage through an integrated marketing process and build relationship and trust, we close opportunities almost two out of three times. When we engage at the last stage, we close one out of ten times – because very likely we were the 2nd or 3rd choice vendor, based on information over which we have little direct control. This is true for all organizations and this is where appropriate marketing plays a big role.

Whether we are a business or a consumer buyer, we all pretty much go through a classic purchasing process. Almost all of us go through the traditional cycle of awareness, interest, trial, purchase and repurchase. The engagement process for each varies quite a bit depending on what segment of buyers we are targeting and what kind of products we are offering via an integrated marketing process. These are the two primary selection factors that need to be remembered:

- 1. Customer Segment**, e.g., Small Business (<100 employees), Mid Market (100-1,000 employees), Enterprise (1,000 to 10,000 employees) & Large Enterprise (>10,000)
- 2. Solution Types**, e.g., requires involved purchase (complex solutions) or uninvolved purchase (simple transactions)

How you use integrated marketing approach to promote transactional products to a small business is very different from the way you promote solutions to large enterprises. The marketing and sales processes for both vary considerably, and picking the right approach is critical in engaging the buyer at the right stage.

Before we take a deep dive into the topic of alignment of integrated marketing tactics with customer segments and solution types, let's visit the purpose of integrated marketing. As Philip Kotler once said, "Marketing simply does two things – build brands and drive demand".

Now what is brand building? It's nothing but relationship building, which leads to the setting of price premiums and lead generation for future engagements. Most branding activities tend to be awareness centric, and this is where public relations activities come in to play. It's complicated at the front end (awareness-building) of the funnel because the communications channels have become very fragmented – though the later part of the buying process for business still follows a more predictable structure. Before you worry about awareness building tactics, the first question that needs to be answered is, what is the purpose of the campaign? Is it building a brand for the future, or is it about driving demand within a much shorter time frame. While branding activity through multiple communications channels certainly impacts the probability of closing a transaction, what can also drive brand awareness is sales. The more you sell, the more people are using your products and services, and that increases general awareness among the very important target group: users. Don't forget that, in today's social media environment, both good and bad user reviews spread quickly. So, actively managing customer experience and providing superior value has a big impact on brand building. For more information on this topic, please read our article 5 Not-to-be Missed Opportunities for Growing Customer Revenues.

Once you have settled on the objective of your integrated marketing campaign – strategic (branding) or tactical (demand

generation) – the next important stage is to focus on aligning the tactics with solutions. The outline below gives a simple summary of how to align various tactics for solution and segment selling. Let's go through each tactic one by one, but remember that taking a multi-tactical approach is critical for certain segments both to build brand and drive near-term demand.

- 1. Awareness Tactics:** Organic search, paid search, social media, content channels, press releases, articles, etc. all play a consistent role in driving awareness for all segments (SMB, Midmarket and Enterprise).
- 2. Interest Generation Tactics:** eBooks, short webinars, informational videos and podcasts also work well for all segments. Face to face events work quite well for the mid market and enterprise segments.
- 3. Trial or Demo Tactics:** Online demos for software and onsite demos for hardware are traditional B2B sales tactics. However, onsite demos and pilots are expensive, so it's important to have referral cases so that a prospect can deploy similar environments without undue investment of resources and come to a proper conclusion. In many cases, potential clients are willing to run a paid pilot.
- 4. Repurchase:** The SMB segment can be reached through telemarketing close to expiry time, but for most mid market and enterprise sales, the renewal process starts well ahead of the contract expiration date. For a deeper dive in to the topic, please read our article on 5 Not-to-be Missed Opportunities for Growing Customer Revenues. Large account sales renewals with the same provider are based on three primary criteria: how happy the customer is, what the switching cost is likely to be, and how many choices are available. It's incredibly important for a provider to understand these criteria in order for them to continue to be the supplier of choice.

Based on the current state of the market, integrated marketing, i.e., use of search, social, email, events, collateral and other marketing tools, is the only way to ensure that campaigns are effective and to align the right tool for the right segment. ZINFI's Partner Marketing Management (PMM) platform provides a plethora of integrated marketing tools, which when coupled with ZINFI's database and marketing concierge services, enable an organization to build demand in a focused and confident way.



6 Why Web Content Syndication Is Critical for Content Marketing

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

In the old days, content marketing essentially consisted of creating advertising, packaging, promotional flyers, tradeshow materials, and maybe issuing occasional press releases. The advent of the Internet changed the way the business world

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

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

campaigns. Websites are most commonly seen as a dynamic platform for web content syndication and a vehicle for a web content syndication based content marketing strategy.

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

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

1. A clear web content strategy: It is about developing a website strategy that is focused on optimizing your entire web content around a set of keywords for which your buyers are constantly searching. You need to attend to this as a priority, before applying your thoughts to web content syndication.

2. Content distribution strategy: Once you have optimized your web content, the next step is about distribution of content using your choice of a variety of web content syndication engines. Some of the social media and blog management tools allow you to post and stream content from your own site, but you need a clear strategy on how you will do that in order to obtain the beset results.

3. Building a network effect: The third and final critical component is, if you are selling through the channel, allowing your channel partners to use web content syndication to promote your content via their websites. This can significantly amplify your reach to a significantly wider audience, and will also help you to control and enhance your brand presence, and generate real time leads.

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





7 Social Syndication – A Great Way To Expand Your Social Selling Reach

The process of selling has changed, because the process of buying has changed. No longer do we wait for our phone to ring and to be interrupted by a pushy telesales or telemarketing person, or expect to find out about a product through advertising; today we proactively search for what we want to buy. This change in the selling process has given social syndication a key role in helping organizations to get the word out through a network of followers rather than randomly hoping to gain results from interrupting someone. This is the new age of social selling, which requires a new and differentiated approach using social syndication capabilities.

It's worth spending a few minutes defining what social syndication is before discussing how you can deploy it across your organization to drive more sales.

When social media erupted onto our desktops about a decade ago, most of us thought of it at most as a way to share family photos and amusing videos of cats. However, organizations

like LinkedIn, SlideShare and a few others had a different goal in mind: serving business users in a very different way. While groups in Yahoo and other sites were already in existence, allowing professionals to exchange ideas, thoughts and peer reviews, there was no single unified platform available to promote the YOU brand – the brand that most deeply matters to most of us.

Sharing a cool cat photo is entertaining, but sharing a high impact article with the potential to influence many people's professional development is a more important opportunity to grow awareness. Social syndication plays to this intrinsic desire for professional growth by its core proposition of tribal or community enhancement: sharing of content that is relevant to individuals sharing common goals. The reason I use the word "tribe" is because the majority of social anthropologists are in agreement that many of our behaviors in social media – the need to share, self reflect, boast or display humility to a group – are a true reflection of who we are as humans, whose ability to feel alive and satisfied with our lives rides on our intrinsic need to connect and communicate.

“The deployment of social syndication is growing rapidly and offers high potential to deliver competitive advantage for all organizations who want to engage early with their buyers through a relationship network, spread their message quickly and, most importantly, maintain superior mind-share at the very early stages of the buying process.”

This innate human need creates a unique opportunity for sales people to move from an intrusive or interruptive telemarketing process, which is an innately negative experience, to a more needs-fulfillment based approach. This takes the fundamental premise that a buyer only buys what he or she (knows) they need. It follows that, before steps are taken to procure anything, the natural first part of any buying process is research, in the quest to understand what would solve someone's needs = problems. Content marketing plays a huge part in meeting this need to understand before purchase, and a well-constructed social syndication engine can work wonders in satiating this need and, therefore driving sales.

How do today's social syndication capabilities work? The ability to distribute relevant content, to anticipate and answer questions from potential prospects, and scale to a national or global level, can be met by a scalable and flexible social syndication engine. To meet these criteria, the core components of any social syndication engine should be as follows:

- 1. Connection to existing social content:** Most organizations today have multiple social channels through which they distribute content to their target audiences. However, the ability to auto connect to an existing stream of content, and then to amplify it via a distributed network, is a critical part of building your audience. It is not practical for all sales channels (direct or indirect) to create original, primary content, but with access to social syndication streams both direct sales teams and channel partners can distribute content easily and effectively.
- 2. Access to a social syndication network:** Any organization may have a few thousand followers through corporate social networks, but when you multiply those by tapping into the networks of direct or indirect sales teams, the reach and the power of communication amplifies exponentially. Surprisingly few companies are using this capability effectively today. For far-sighted marketers, this is an exciting opportunity for differentiation and growth.
- 3. Prioritizing content streams:** Social syndication first and foremost needs to focus on providing reader value and interest, and then prioritizing content that enhances the relationship between the organization and its buyers. The objective of social syndication is not to stream irrelevant information just for the sake of publishing something. Each stream must be thoughtful, add value and enhance the brand experience.
- 4. Tracking metrics and ROI:** The primary benefit of social syndication is to expand the distribution and reach of valuable content that already exists within an organization. But you need to have a good idea about how much you can expand your distribution, how your reach is growing and what content has most impact within which channel (direct or indirect). Metrics and ROI are often the last but always the most important steps of any good social syndication platform as they allow an organization to focus its communication strategy around what readers are responding to – and get rid of what is not working.

Content marketing is evolving rapidly and is now a critical enabling factor in the sales process. As a result, the deployment of social syndication is growing rapidly and offers high potential to deliver competitive advantage for all organizations who want to engage early with their buyers through a relationship network, spread their message quickly and, most importantly, maintain superior mind-share at the very early stages of the buying process.



8

Why Web Content Syndication Isn't Always the Answer for Channel Marketing Automation

While high-end Web Content Syndication tools have existed for more than a couple of decades, the introduction of simple product showcase syndication for partners' websites is relatively a new weapon in the Channel Marketing Automation arsenal. Web Content Syndication is a very important technology and can quickly distribute a large amount of branded content via multiple partners' websites. It is very easy to set up and can be highly effective for branding and lead generation purposes.

Web Content Syndication isn't guaranteed to succeed, though; in fact the majority of the pure play tool providers fail to build brand and generate leads simply because channel partners do not get enough traffic to their sites. On the other hand, integrating Web Content Syndication as a part of comprehensive Channel Marketing Automation process has been shown to drive significant results and scale quickly as demand grows.

Web Content Syndication usually fails to work because of one or more of the following failure modes:

- 1. Websites are used as digital brochures:** Most partners do not focus on digital marketing as a core way to grow their business. Even when partners run special campaigns, promotions or events, they use standalone registration sites, while the corporate sites remain separate, without any linkage.
- 2. Partners do not generate enough traffic:** The overwhelming majority of partners – unless they are large regional or national providers – do not have a comprehensive, dynamic web presence. Digital marketing is not integrated into their business processes and only in rare cases do they focus on driving traffic to their websites for generating and converting leads. Most partner websites experience very low traffic rates, and therefore syndicated content remains hidden and unnoticed.

3. Vendors change showcases but partners do not update:

A partner may use syndication content for one instance, but since they do not see any significant resulting business value they tend not to update the codes on their website to pull down fresh syndicated content. As a result, many partner websites end up with vendor showcases displaying nothing but page (404) errors.

Overcoming these challenges is, frankly, tough, especially since changes in business processes and behaviors are needed in order to turn things around. Instead, vendors can take an alternative approach that is more likely to deliver a significant positive impact by selecting the right Channel Marketing Automation platform. Here are the criteria for success:

- 1. Give partners choices:** Yes, web syndication is important, but it is even more vital to provide showcases that the partners can quickly modify to fit into their existing web infrastructure. Beyond multiple showcases, the ability to customize each showcase is critical for broader adoption of Web Content Syndication.
- 2. Provide an integrated set of tools:** Since the primary challenge is to drive traffic to a partner website, making it easy for the partner to use integrated Search, Social, Email, Event and Microsite marketing tools is also critical.
- 3. Provide lead alerts in real time:** Since most partners lack dedicated marketing resources, it is essential to provide them with both online dashboards, and instant, email-based lead alerts. This enables partners to quickly follow up with leads and pursue them through the sales cycle in a timely and effective manner.

4. Localized showcases: English is used in about 60% of the worldwide vendor markets, but the remaining 40% require the use of at least a further dozen languages. An effective Channel Marketing Automation tool must be able to provide showcases in various languages – including a localized user interface – to drive global partner adoption and web traffic.

5. Localized concierge services: The right Channel Marketing Automation platform is half the battle, but the other half is all about having appropriate resources in the field: localized concierge services are crucial resources to reach out and onboard partners, guide them through available programs, and help them use a set of integrated tools – including web content syndication – to realize the benefit of digital marketing. Without this final touch from concierge services, much of the channel potential remains unrealized.

To summarize, we see today that Web Content Syndication usually fails to deliver, because most Channel Marketing Automation platforms lacks integrated tools, and don't enable the technology vendors to customize programs for their channel partners' needs.

ZINFI's Partner Relationship Management (PRM) platform can provide vendors with a complete, integrated Channel Marketing Automation platform. This PRM platform can not only provide your partners with a dynamic web syndication module along with other, necessary integrated elements like Email Marketing, Event Marketing, Social and Search Marketing, but empower them with localized concierge support – unlike any other vendors in the market today.





9 What Is Through-Partner Marketing Automation?

Organizations that sell through the channel realize how important it is not only to enable their partners to market and generate demands, but also to deal with the complexities of setting up demand generation campaigns, informing partners and letting them download marketing assets to set up and run campaigns. However, with the advent of Through-Partner Marketing Automation (TPMA) capabilities, companies today can rapidly deploy end-to-end integrated marketing platforms for their partners and drive demand. In this article, we will explore various aspects of Through-Partner Marketing Automation.

Traditionally, partner marketing in the business-to-business (B2B) environment meant running end-user events and telemarketing. In the business-to-consumer (B2C) domain, it meant running activities like advertising and in-store promotions. However, with the rapid evolution of social media over the past five years, and with both consumer and business buyers flocking online to

research products, the marketing mix has changed dramatically. This has led to a whole new segment of marketing automation, which is now morphing into a core set of capabilities that comprise Through-Partner Marketing Automation.

Any Through-Partner Marketing Automation platform today needs to have a core set of capabilities around the following activities:

- **Setting up campaigns and programs:** The primary goal is to set up programs and campaigns with the company's business and channel objectives. Any Through-Partner Marketing Automation platform should provide a complete online campaign library where a partner can go and download either all individual assets in a click, or run integrated end-to-end campaigns in a few minutes. The ability of a partner marketing manager to set up campaigns in a dynamic way is paramount here.

- **Planning demand generation activities:** The goal for this set of activities is to identify a group of partners who are capable and willing to run campaigns and programs.

1. Partner profile manager: This feature allows a vendor to upload their partner contact list in a unified central position to keep track of partner activities. A state-of-the-art Through-Partner Marketing Automation platform can not only track what a partner has done, but also enable a vendor to plan campaign activities dynamically online.

2. Lead management: The purpose of a demand generation campaign is to generate qualified leads of prospects who would potentially buy a product or a solution. The rise of digital marketing has enabled marketers to track marketing spend in a very effective way. Today's Through-Partner Marketing Automation platform needs to have a sophisticated lead management capability. At the heart of this lead management capability is a CRM system.

- **Executing marketing tactics:** This is where partners fully leverage a Through-Partner Marketing Automation platform to run end-to-end integrated campaigns.

1. Search marketing: Seventy percent (70%) of buyers today search online and pretty much make up their mind what they will buy based on the online research that they carry out. Any Through-Partner Marketing Automation must have search marketing capability for partners to use.

2. Social marketing: Right after search marketing, one of the most important front-end marketing tools for Through-Partner Marketing Automation is social marketing management. A vendor should have the ability to push social marketing content via a partner's individual account to their respective end-users. This is a critical capability that can drive and scale awareness significantly.

3. Email marketing: While many have declared the death of email marketing (please read our article "Is Email Marketing Dead?"), the reality is email marketing can still be a highly effective tool in pushing out newsletter and other relevant content to end-users via a partner network. Email marketing is also highly effective for running quarterly promotions and programs. This is a must-have capability for any Through-Partner Marketing Automation platform.

4. Microsite marketing: If you are selling a solution, it's important to explain how the solution works in solving a customer's pain point. This is where a vendor may want to set up a complete microsite focusing on various aspects of the solution and discuss how the product can address customer needs by using videos, white papers, case studies and other marketing media. Most advanced Through-Partner Marketing Automation platforms today have microsite marketing as a core capability.

5. Event marketing: This has been a staple for most B2B and B2C marketers for ages, but most recently—with the advent of online webinars and on-demand webinars—event marketing has taken on a whole new meaning. A state-of-the-art Through-Partner Marketing Automation platform today will have advanced event marketing capabilities that should not only address roadshows, tradeshow, etc., but also a dynamic set of online events, both live and on-demand.

6. Collateral marketing: Last but not least, partners always want to leave brochures, data sheets, case studies and other collateral with their clients to explain the fit of the solution. This is typically more important in B2B than B2C, but high-end B2C sales (e.g., automotive, home automation, audio-video) tend to rely quite a bit on collateral. A Through-Partner Marketing Automation platform must allow a partner to quickly co-brand and print collateral materials.

- **Global deployment capability:** For manufacturers selling globally, the Through-Partner Marketing Automation platform must be able to support multiple languages, local currencies, local campaign requirements, data privacy laws and requirements.

- **Dynamic analytics:** Any Through-Partner Marketing Automation platform must be able to provide dynamic and custom reports that allow users at all levels to track, measure and analyze performance, and to use these metrics to take appropriate actions and increase ROI.

As the world we live in gets more complex, front-end marketing is increasingly fragmented. Through-Partner Marketing Automation can play a pivotal role in simplifying marketing workflow by increasing visibility and scalability, but most importantly it can drive partner satisfaction and capabilities to drive profitable growth.



In addition to loading up the right campaigns in the TPM software, another key requirement for vendors is to offer localized content. If a vendor is selling globally, it is very important to provide content not only in English, but also in other languages. And localization should not be limited to content alone. The entire user interface of the through-partner marketing software should be fully localized. Today, very few vendors can provide that, so when you are evaluating through-partner marketing software, you should make sure the user interface is fully localized and not just using Google Translation, which tends to introduce a lot of mistakes and errors.

Here's another capability to look for when considering through-partner marketing software: Can it be integrated with other channel marketing automation applications like CRM, ERP, incentives management systems and the like? Most organizations today have a number of such systems. If you plan to implement through-partner marketing software, be certain that the platform you choose fits smoothly into your existing infrastructure, and that you can track program performance end to end.

Finally, one of the most important aspects of TPM software is to provide real-time analytics. Using this capability, a vendor can quickly learn what is working and what is not, and replace or refine programs and campaigns to drive better results. When a campaign works, state-of-the-art through-partner marketing software also allows efficient scaling of that campaign, not just to multiple local markets but globally.

10 Why Through-Partner Marketing Software Matters

Most companies selling through the channel want their partners to generate demand for them. However, now that the world of marketing has gone digital and marketing has evolved into a science, it is quite difficult for most partners to drive marketing activities and generate demand in a consistent fashion. This is where through-partner marketing software (TPM) becomes essential.

Through-partner marketing software can significantly streamline demand generation activities by allowing a vendor to load a set of campaigns into a portal where partners can log in and easily carry out demand generation activities. Typically, most through-partner marketing software comes with a basic set of tools for specific activities like search marketing, social marketing, email marketing, event marketing and content syndication.

The key for a vendor is to make sure that campaigns loaded into a through-partner marketing software platform are complete and effective. Partners generally do not like experimenting with new

campaigns, because they lack resources and time. Therefore, when a vendor loads up a set of campaigns into a through-partner marketing software platform, the campaigns must work. Otherwise, partners lose interest and program adoption drops very quickly.

“one of the most important aspects of TPM software is to provide real-time analytics. Using this capability, a vendor can quickly learn what is working and what is not, and replace or refine programs and campaigns to drive better results.”





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3 “Must Haves” for Your Partner Marketing Automation Platform

Partner marketing automation platforms have been around for some time now. In this article, we will talk about how you can drive partner performance around the world by leveraging your partner marketing automation platform. Before we get started, however, let’s take a close look at the evolution of partner marketing automation platforms over the past decade or so.

With the advent of the Internet and, subsequently, the setup of extranets, starting in the early 2000s many companies began to integrate their in-house CRM software with their extranet to create partner portals. The intent behind setting up these partner portals was mainly to facilitate one-way communication—informing partners of available assets and programs that the company was launching. However, this approach presented a major challenge. Most of the content available in these portals was not customized or localized, and it had no mobile responsiveness. Also, additional applications were plugged

in over a period of time to address a variety of aspects of partner relationship management. Applications like partner training, partner incentives, deal registration and more all got patched into this legacy infrastructure and created a hodge-podge workflow that resembled a patched-up quilt. This had a significant (and negative) impact on satisfaction with regard to the quality of the user experience.

Unfortunately, even now most large organizations selling through the channel have not made significant efforts to invest in their partner marketing automation platform and create a best-in-class experience for their partners. While there are plenty of point products that can be patched together and integrated into a partner portal, each and every one these applications—whether it’s partner training, partner business contracts, business planning, incentives management, marketing campaigns or sales enablement tools—has a different interface. From the partner perspective, the enormous complexity associated with this

multiplicity of interfaces is a big problem. Not only do partners have to navigate through a massive amount of content to find what they’re looking for, they also face a completely different experience when moving from one application to another. While it may be understandable that a vendor would be reluctant to “rip and replace” the entire partner marketing automation platform, there are plenty of options that exist today—like those provided by ZINFI—where a vendor can lay out a roadmap and migrate their existing partner portal over to a state-of-the-art partner marketing automation platform over a period of time by turning on different modules successively.

In this article, we’ll explore the three most essential areas to focus on—ease of use, partner enablement and business analytics—as you work to upgrade your partner marketing automation platform to a next-generation level. Your platform should be able to provide an end-to-end solution that incorporates and integrates these three key areas. If you are trying to solve these challenges by cobbling together different applications, chances are you are already creating a level of complexity that will be hard to resolve because of the user experience issues we discussed earlier. If you have different applications patched up together, each user interface is different, and your partner marketing automation platform will not provide a seamless user experience from end to end. Therefore, as you begin to address the crucial issue of ease-of-use, think about putting together a roadmap and selecting a partner marketing automation vendor that provides partner relationship management, partner marketing management and partner sales enablement tools under a single umbrella.

Now let’s look more closely at each of three core elements:

- **Easy-to-use partner portal:** To attain true ease of use you have to address three key requirements: localized interface and content, personalized content and mobile responsiveness. Localized interface and content comes into play when you are doing business globally. If you are addressing a global base of channel partners, English alone will probably not cut it. You will need to provide at least French, Italian, German and Spanish, and then eventually Japanese, Korean, Chinese, and potentially other languages in Europe and Asia Pacific. Having the ability to provide a localized user interface as well as localized content is critical to successfully engaging partners who do not communicate in English. When it comes to personalized content, it’s essential to have granular partner profiling capabilities. If you can map content by various partner types, locations and language

requirements, when the partners log in to the portal they will see only the content that’s relevant to them. Even today, most companies do not provide this level of personalization. As a result of that, partner portals tend to be overwhelming for many users, and most of the capabilities of partner marketing automation are not used simply because partners cannot get to the right content quickly and easily. Mobile responsiveness addresses the fact that partners travel quite a bit and are not in the office all the time. They need on-the-go access to the partner portal assets and activities via a mobile phone or tablet.

- **Partner enablement:** This area also comprises three core elements: partner training, deal registration and incentives. Most companies today use disparate applications for these functions that are patched together, and that means partners are required to learn to different interfaces, which in many cases don’t talk to each other. Remedying that requires backend integration that is expensive, cumbersome and difficult to upgrade and manage. So look for a partner marketing automation platform—like ZINFI’s—that provides a learning management system, deal registration and incentives management (including marketing development funds, rewards, rebates, etc.)—all under a single umbrella. When you can provide that kind of integrated workflow, you not only enhance the partner experience, you increase utilization of these tools and programs substantially.
- **Business analytics:** When considering business analytics in a partner marketing automation platform, there are three key subareas where you need to be able to drill down into to understand what’s working: Asset analysis can help you determine which assets are working and which assets are actually being used by partners, by region, solution type and various other filters. Program analysis should provide insight into which marketing programs are being consumed and why they are effective. Partner performance analysis can help you generate reports on sales, training, marketing and financial data by various partner groups to understand why partners are performing well in certain areas and what needs to be changed and improved.

Ease of use, partner enablement and business analytics are the three core pillars that you should add to your partner marketing automation platform to bring it to the next level. Keep in mind, however, that within each of these areas there are multiple elements that need to work together seamlessly so you can provide a unified experience to your partner base.



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Partner Marketing Automation Roll Out – 5 Critical Choices You Should Make

Many vendor organizations today are considering the implementation of end-to-end partner marketing automation tools. What's more, many have already put in place a set of point-tools that are trying to make them all work together. The key for both of these scenarios is to make sure that partner marketing automation doesn't take a life on its own and serve as a means to an end. The primary purpose of a partner marketing automation platform is to drive profitable growth, so yes, it must increase your partner-led demand generation activities, but it also must reduce costs by introducing more streamlined processes and greater efficiency. However, the success of a partner marketing automation platform depends directly on organizations' following specific, sequential steps in order to deploy such capabilities globally. The following is a brief overview of the five critical choices a vendor organization must make before an integrated partner marketing automation platform can be deployed worldwide.

“To achieve this goal, an organization must think through the partners to who they will deploy the platform, what parts of the world will adopt the platform most readily and in what order, which campaigns must be loaded and why, and how sales incentives should be aligned to reward closure.”

- 1. Plutocracy vs. Democracy:** When you are planning to build your pipeline via your partner network using partner marketing automation, the first question to ask is 'who sells my product?' Do the majority of my sales come from 20% of my partners? If that is the case, then you should focus first on enabling the top tier partners who do most of the selling. Making them more efficient will be the logical way to get results from rolling out your partner marketing automation. On the other hand, if half of your partners do half of your sales then you will have to roll out partner marketing automation for most of your channel. In both cases, eventually you want to make sure the partner marketing automation platform can be available for all partners but, in the beginning, being selective and applying a strategic focus helps you to get to those wins faster, and promotes success to drive broader adoption at a later stage.
- 2. Global vs. Local:** The next question for deployment of your partner marketing automation platform is where does it make most sense to launch? While launching in a large market like the US or Germany or China has the benefit of high volume and high opportunities, there are times when you may be better off launching into smaller market such as Canada or Singapore. This highly targeted approach allows you to test campaigns and perfect your messaging and positioning before you undertake a mega launch of your partner marketing automation. At ZINFI we have often seen global teams roll out campaigns that are barely used at individual country levels. This waste of resources can be easily avoided by taking a strategic approach about when to launch local as opposed to global campaigns.
- 3. Quarterly vs. Bi-Annual:** The next critical question is the ideal frequency of your campaign refresh rate. Most companies launch multiple products and solutions every quarter but often less is more. So, before you load up a continuous stream of fresh assets into your partner marketing automation platform, the key is to make sure you have the right assets to enable the right partners be most successful, and that will also enable your local country teams to prioritize what they know is most effective for their particular geography. One of the best ways to balance the tension between not enough fresh content and not overwhelming your partners with too much, is to take a bi-annual approach – a first half and second half refresh. This gives you breathing space to align your sales incentives over a period of six months rather than rushing to meet quarterly deadlines, which may suit the transactional nature of SMB-focused product but don't allow you enough time to gain traction with co-initiatives in the enterprise space. So, thinking

through your campaign upload and refresh is critical for partner adoption and success.

- 4. Manual vs. Automated:** We at ZINFI provide complete end-to-end partner marketing automation capabilities at a flat price. However, we recommend to our customers that even if they have the access to a comprehensive set of automation capabilities, it may not make sense for them to switch everything over from their current manual processes. An example would be to move a campaign in a box, with incentives, collaterals and more to a fully automated delivery process. There are two reasons for this – first, it takes time from the vendor standpoint to get consensus on what to load into the tool, so even if the initial set-up only takes minutes, it will take a long time to achieve alignment internally on what campaigns to load into the partner automation tool. Secondly, it is easier to roll out one or two new tools per quarter for a core group of partners and ramp from there, rather than launching a plethora of campaigns or assets and tools all at once. The goal is to build rolling thunder. Rome wasn't built in a day, and it doesn't make sense to expect a deployment of your partner marketing automation platform to be successful globally and overnight.
- 5. Tactics vs. Initiatives:** Last but not least, one of the most important things to think about is how you align your sales initiatives behind the marketing tactics (email, event, search, social, etc.) that you will provide to your channel. Without a comprehensive alignment of the two, much of the potential of your partner marketing automation platform will remain unrealized. For your partner to see value in your partner marketing automation platform it must achieve two primary objectives. First, it should make running campaigns significantly easy/easier, but it should also streamline the process for sales reps at your partner organizations to follow-up with leads, close, report and receive sales incentives. Closing this loop is incredibly powerful and organizations that pay extra attention to making this happen get a lot more value from their platform than those who don't.

In summary while the very purpose of a partner marketing automation platform is to give you the ability to drive growth through your partner network at a lower cost, there's more to it than that. To achieve this goal, an organization must think through the partners to who they will deploy the platform, what parts of the world will adopt the platform most readily and in what order, which campaigns must be loaded and why, and how sales incentives should be aligned to reward closure. Once these choices are judiciously made, your partner marketing automation platform is almost guaranteed success.



can benefit from leveraging assets that address the largest possible segment.

- **Third**, configure your through-partner marketing software to provide lead distribution and management capabilities. This way, when you distribute leads to partners or they generate leads on their own, you can track results in the most effective way. Once you have completed these three core steps, then you can deploy your through-partner marketing software for the rest of your channel.

When you've aligned your through-partner marketing software behind the right partners with the right content and have sorted through your lead management and distribution work, you, as a channel marketing manager, will have to also make sure your internal stakeholders are behind this effort. It's not unusual for a client to properly deploy their through-partner marketing software but never really promote it internally to make the channel sales and support teams aware of it. Promotion is essential for success. The more you engage your internal sales team in driving your through-partner marketing software, they

more they will feel invested in your successes as your partner base generates demand and closes sales.

Finally, don't forget to celebrate success. Too often we get busy with moving on from one quarter to the next and don't take the time to celebrate when things are going well. Celebration not only boosts morale—it can also drive platform adoption. Work with your internal sales team and external partner base to identify the partners that are driving most leads using various campaigns and tactics, and are engaging their own internal stakeholders. Success is contagious. When you call out successes among various constituents of your channel—inside sales, field sales, distribution managers, distribution marketing, as well as your channel partner base—you will see quarterly adoption rates for your through-partner marketing software rise.

Through-partner marketing software can help you and your partner base significantly improve demand with the proper alignment and with the engagement of the right stakeholders in various stages of platform and campaign rollout. This is not rocket science, but it does require thoughtful planning and execution.

13 How Through-Partner Marketing Software Can Grow Sales

Through-partner marketing (TPM) software has been around for about a decade or so. There are several companies like ZINFI who provide through-partner marketing software, which can be a big help to vendors selling through the channel to build their indirect sales pipeline. In this article, we will discuss how a vendor can do this most effectively.

Before you deploy through-partner marketing software and enable your partners to drive demand, you need to think through a few things in a structured way:

- **First**, focus on the partners that are generating sales for you already. They've proven they know how to sell your products, so when they drive more demand you know they will be able to close.
- **Second**, make sure you focus on providing horizontal campaigns first so that partners who are already selling

“Through-partner marketing software can help you and your partner base significantly improve demand with the proper alignment and with the engagement of the right stakeholders in various stages of platform and campaign rollout. This is not rocket science, but it does require thoughtful planning and execution.”





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Definition of Unified Channel Management (UCM)

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

- **Affiliate Marketing Management (AMM):** Affiliates are your partners who focus primarily on promoting your brand to their audiences using a variety of tactics. In return, you pay them commissions for driving traffic to your website. With our affiliate marketing management (AMM) solution, you can ensure you recruit the right partners and enable them to promote your products and services through their network. As your affiliates drive targeted traffic to your website, you track their performance, pay them commissions and grow your network.
- **Partner Relationship Management (PRM):** These partner management activities focus on optimizing and automating internal partner management processes to make it easier for partners to do business with the vendor. A properly configured PRM solution significantly reduces operational costs, efficiently allocates resources behind the partners who have the highest potential for driving profitable growth and significantly increases partner satisfaction.
- **Partner Marketing Management (PMM):** These channel marketing activities focus on enabling channel partners to drive demand from their prospects and customer base by leveraging the vendor's marketing assets and tools. A PMM solution can help vendors optimize the use of market development funds, stimulate purpose-driven demand generation and exert control over brand extension via channel partners.
- **Partner Incentives Management (PIM):** Rewarding your partners for channel program activities is critical for success. The Incentives Management module allows you to automate your incentive programs – including market development funds, rewards, rebates, commissions and more – across the entire partner journey. Reward high-performing partners and incentivize high-potential partners to perform better.

Core Modules Overview



Mobile Ready Application

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



Alerts & Notification Management

The Alerts & Notifications module aggregates all system alerts via a unified console and allows users to set one or more notification preferences via email, SMS or mobile app. Users can also control the frequency of alerts, including individual or aggregate alerts.



FluidCMS™ Content Management

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



FlexiFlow™ Workflow Management

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



Partners Profile Management

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



Identify and Access Management (IAM)

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



Enterprise Change Management

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



Business Intelligence Reports

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



Centralized Interconnection (CENTRi™) Management


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



Users & Group Management


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

Expanded Modules Overview




Documents Library Management

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




Co-Branded Assets Management

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




Products Details Management

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




Communicate To Partners Management

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



Community & Discussions Management

The Community module enables organizations to socially connect – both internally and externally – to facilitate communication and collaboration. This module seamlessly integrates with multiple UCM modules, but it can also work as a standalone module.




Partner Locator Management

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




Partner Support Management

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



Partner Survey Management

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



Exchange Management

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



Projects & Tasks Management


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

Affiliate Marketing Management (AMM) Modules Overview




Marketplace Management

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




Promotion Management

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



Referral Management

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




Payment Management

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


Partner Relationship Management (PRM)

Modules Overview



Partner Onboarding Management

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




Partner Leads Management

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



Partner Contracts Management

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




Deals Registration Management

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




Partner Business Plans Management

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



Configure Price Quote (CPQ) Management

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



Partner Learning Management

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



Channel Data Management (CDM)

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


Partner Marketing Management (PMM)

Modules Overview




Search Marketing Management

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



Microsite & Landing Page Management

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



Social Syndication Management

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



Event Marketing Management

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



Direct Mail Marketing Management

With the Direct Mail module, organizations can create co-branded direct mail templates for partner use in the form of post cards, brochures and other formats. This module can also be connected to national printers for seamless shipping and mailing.



Web Syndication Management

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



Email Marketing Management

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




Multi-Touch Campaign Management

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


Partner Incentives Management (PIM)

Modules Overview



Commissions Management

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




Sales Rewards Management

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



Market Development Funds (MDF) Management

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



Rebates Management

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



About ZINFI

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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