



Unified Channel Management Best Practices Guide



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A Letter from the CEO

The Leader in Unified Channel Management



Dear Channel Professional:

Thank you for picking up this booklet on channel marketing best practices. We at ZINFI have been highly privileged to work for major Fortune 1000 companies on a worldwide basis to drive their channel programs globally. Over the past decade we have learned what works and what doesn't work. This booklet is a brief summary of some of those lessons learned.

We believe that the companies that go to market via an indirect channel (resellers, VARs, system integrators, agents, dealers, brokers, etc.) will continue to innovate to provide a better business proposition for their partners and value propositions for their end customers. In order to achieve their business goals, it will be essential to optimize channel management end-to-end. Our vision is to enable our customers to optimize their channel end-to-end via our Unified Channel Management (UCM) platform.

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

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

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

This booklet focuses primarily on various aspect of PRM, with emphasis on partner portal management, lead management and incentives management. We encourage you to go through the various best practices articles; we hope you will walk away with practical ideas that you can start implementing today to make a sustainable difference in your organization.

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

Cheers!

Sugata Sanyal
Founder and CEO



How This Book Is Organized

This booklet is divided into seven sections, with Sections II through VI covering the core elements of Unified Channel Management. Here is a brief overview of these core sections:

The second section explores the challenges of **Partner Relationship Management (PRM)** from a variety of angles, including the development of an integrated framework for PRM, the specific capabilities that best-of-breed PRM software should cover, how to select a PRM software vendor and the importance of incentives management capabilities for PRM.

The third section provides an overview of what successful **Partner Marketing Management (PMM)** looks like on a global level, presenting several high-priority areas for deployment, the best ways to drive adoption of automation, steps for empowering country teams using channel marketing automation and tips for using integrated tools.

The fourth section focuses on the emerging field of **Partner Sales Management (PSM)**, discussing core channel sales metrics, core elements of automating partner sales enablement, and why channel marketing automation needs to focus heavily on partner sales enablement to stay relevant.

Finally, in the fourth section we look at some key **Marketing Concierge Services** that you need to deploy locally and globally to enable your partners to build and capture demand from their prospect and customer base.

The lessons and best practices in this booklet are based on years of intensive efforts creating and deploying sophisticated channel marketing automation systems, as well as ongoing discussions with our customers as we strive to understand their evolving challenges and requirements. Whether you read each section and chapter in sequence or skip around as your particular interests and needs dictate, we think there is a wealth of good information here that even the most experienced channel marketer can learn from.

Enjoy!



1

Redefining Channel Management Through A Unified Lens

Most of us are aware of the complexity of channel management. It is even more complex for companies that are selling globally, because there is tremendous variability in requirements and parameters from region to region. I've written elsewhere about how global market requirements can have a tremendous impact on channel policies and programs, and how a company goes to market. In this chapter we will explore how a unified approach to channel management can greatly improve channel performance.

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

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

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



complexity of managing the channel as you pursue channel marketing goals and initiatives.

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

The same kinds of discussions take place in other industries. Companies have to decide whether to sell via open channels or

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

Once a company has established a high-level channel policy and a distribution strategy, the next step is to think about the people structure, because at the end of the day companies do not do business with companies; people do. That’s one reason it’s so important to set up the right channel infrastructure—to make sure that high-volume partners who play a very important role have high touch, but at the same time ensure that partners who do not sell a lot do not feel left out. This is where organizing your channel management infrastructure is critical to make sure all partners not only feel valued and important but also get the level of support that’s appropriate to their profile. From the company side, you need to ensure the channel management infrastructure is not cost-prohibitive but can actually drive growth and scalability.

A third important consideration in establishing a unified approach to channel management is process. When a partner is onboarded and has access to contracts, training modules, incentives, etc.—all

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

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

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

work well on transactional products where a salesperson does not need to rely on multiple functions to pull solutions together. However, if a program is rolled out and tied to an individual reward, but the salesperson is heavily dependent on the vendor's marketing or technical or support infrastructure, that company or program can fail completely just because it wasn't thought through properly.

A final consideration in putting together a unified channel management approach is technology, which is obviously extremely important. In fact, at ZINFI we have coined the term “unified channel management,” in part to highlight three interrelated core elements of our channel management technology: Partner Relationship Management, channel marketing management and channel sales management.

With Partner Relationship Management, the primary focus is on how the vendor interacts with and manages the partner—signing agreements with the partner, getting them trained, providing incentives, managing performance based on several specific criteria, all at a holistic level.

Channel marketing management, on the other hand, is about enabling partners to go drive demand on their own leveraging marketing assets, sales programs, product initiatives and the like. Channel sales management applies mostly to enterprise-level sales, where people are actually trained through a multi-month, complex sales cycle using a step-by-step approach designed to ensure participants aren't overwhelmed by superfluous sales and marketing tools.

From a technology platform perspective, it is incredibly important—whether we are thinking about Partner Relationship Management, channel marketing management or channel sales management—to make sure all of these elements, individually or collectively, come with a set of business analytics tools for channel management. These tools allow the channel management team to slice and dice the data in various ways to gain insights into what is really going on, to understand what's working and what isn't, and to be able to actions based on that information.

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



2

How to Make Unified Channel Management a Reality

There is no doubt that channel management is complex. However, the complexity only increases when it is managed with a set of tools and systems that can easily be compared to a patched-up quilt. In many organizations, channel management systems actually consist of a hodgepodge of diverse systems that have evolved over a long period of time. As a result, most companies that try to implement a unified approach to their channel management struggle to make it work and get a decent return on their investment. The primary reason for this is a lack of available end-to-end systems that can readily adapt to each organization's unique needs. Every company is different. So, for example, a horizontal product like a customer relationship management (CRM) system cannot really address the requirements for unified channel management. While marketing automation systems have evolved quite a bit over the last few years, and CRM systems have also progressed considerably, no company has completely addressed the need for unified channel management.

So, how are organizations managing the channel today? Here are some of the key areas they are attempting to address, although rarely with complete success:

Partner portal: Most companies that are selling through the channel today have a partner portal. They build this partner portal over a period of years with various sets of tools, but there are no consistent standards that address how a portal should be built, and requirements also vary considerably across different types of channels. For example, if you're looking at a dealer network where the relationship is highly transactional, the partner portal will look very different from a portal in, say, the tech industry, where a solutions provider is working very closely with one or more technology providers to bring in complex, integrated solutions to the market. Similarly, a partner portal in the retail and franchise segment of the marketplace will be unique to those kinds of businesses. Because of this diversity in needs across segments, no vendor has been able to address the requirements for all segments.

Partner records: If we look at how most companies are selling through the channel, and in particular how they manage their partner records or their channel records, we find that most of them are using a CRM or some sort of home-grown database. In fact, based on a survey we conducted, more than 40% of

companies actually end up managing their partner list on an Excel spreadsheet. That's kind of scary, but that's where the market is today.

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

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

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

serious issues managing partner training.

A final, and very important, area of concern is partner incentives management. This is yet another area where it's quite commonplace to deploy a patchwork of multitude systems for managing market development funds, rewards, rebates, etc.

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

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

- 1. Profiles (partner profile management):** Partner profiles represent the most important first step in understanding existing partners' capability to sell into various segments of



the market. Establishing the partner profile is also a precursor to expanding and growing the channel based on an understanding of what type of DNA an organization should be looking for when they are trying to recruit new partners. Without a sophisticated database system, it's almost impossible to analyze and manage a diverse set of partner profiles to drive productivity.

- 2. Policies:** Channel policies determine who will sell to what and how. If a channel program has various types of partners, the competencies and reach of those partners, as well as the relationships they bring in, determine whether or not they are actually able to sell. If those policies are not absolutely clear, Unified Channel Management becomes really hard because organizations won't know what exactly to implement.
- 3. Programs:** When we talk about programs, we're referring not just to campaigns like partner recruitment and partner training, but also the ability to put together market-segment-oriented solutions, training, incentives and so on to provide a truly unified channel management framework that allows an organization to recruit, engage, enable and manage their partner base to achieve a desired level of growth. Programs are critical, but they need to be analyzed from an ROI perspective. A unified channel management system should provide the tools that an organization needs to quickly perform such an analysis.
- 4. People:** This is one of the most important Ps. How the field organization is structured, how territories are mapped, how the relationships between the regions and the worldwide organization work—all of these factors contribute to the broader framework required for people management to drive performance. However, without the right structure and the right Unified Channel Management system mapped into that structure, it's almost impossible to move fast enough and see through a dashboard what is going on in real time.
- 5. Platform:** This is where tools and systems come in. Earlier I talked about why platforms are important. However, before a company can deploy a truly unified channel management system at a global level, it must think through the first four Ps mentioned above. How are we going to manage our partner profiling and profiles? What actions are we going to take based on that understanding? Are there policies in place that need to be aligned or streamlined? And can we streamline policies without a channel management system in place? What programs makes sense, and what data do we have to analyze programs and dynamically respond based on ROI analysis? How can we align the people to look for the most efficient structure? Once these questions have been answered, we're in a much better position to consider how to implement a system on a step-by-step basis so the organization is not overwhelmed but is able to systematically increase its maturity level through transparency and performance management globally.

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

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3

How to Create an Integrated Framework for Partner Relationship Management

Whether you are selling through the channel to businesses or consumers, chances are you may be grappling with one or more of the following challenges: too much churn in your partner base, lack of partner marketing and sales competencies, poor marketing ROI from co-marketing activities or loss of sales velocity due to increasing channel management costs. While the success of a channel program depends on a multiplicity of factors like end user value proposition (product and solutions), partner business proposition (predictable profitable growth) and overall market growth opportunity, it takes an integrated Partner Relationship Management (PRM) framework to successfully realize the true revenue potential of any organization selling through the channel.

In this overview, we will address multiple aspects of the Partner Relationship Management framework. Needless to say, at the epicenter of this Partner Relationship Management framework is a very strong business proposition for the partner. Here are some guidelines on how you can build a Partner Relationship Management framework step by step:

1. **Partner portal:** The first step in launching a Partner Relationship Management framework is setting up a dynamic partner portal that can be used for partner recruitment, training, performance management and demand generation activities. Most companies today have some sort of a partner portal. However, what they really need is a dynamic content management system that can not only make content mobile-responsive, but also visitor-specific to reduce the time needed to find the right content. Without dynamic content management capabilities, most partner portals fall short of meeting the objective of engaging and communicating channel programs and content to the target audience. It is also vitally important that the partner portal provide a secure web services communication interface so that it can connect to other tools for functions like partner training and incentives management.
2. **Partner recruitment:** Whether you are an organization with a large channel network trying to engage existing partners into a specific set of channel programs, or an emerging start-up

trying to build your channel, partner recruitment is always the first process step to initiate a structured approach towards Partner Relationship Management. Without a proper partner recruitment framework and the appropriate onboarding steps, the entire relationship can get off on the wrong foot. If your organization follows a logical 30-60-90-day onboarding approach, it can increase partner satisfaction in these early stages of engagement, and also build partner engagement, resulting in substantial revenue acceleration.

- 3. Partner training:** After recruitment, the next most important step is to provide a structured approach towards training the partner organization effectively with your channel programs. If you are recruiting a new partner, you could base your Partner Relationship Management program on a combination of face-to-face training events plus online learning management systems (LMS). There are several reputable online LMS tools available, if you don't have one already.
- 4. Partner engagement:** Your Partner Relationship Management platform must have effective engagement tools which should include a mobile-responsive dynamic partner portal, role-based content delivery, social marketing connectors, partner community, multi-touch email marketing, event marketing and microsite marketing. You need all these to effectively promote the various aspects of your channel programs. Partners are too busy for irrelevant content, so the more you can make your content and communication speak to their needs, the more engagement you will create with your partner base. Mindshare is everything. Having the right tools in your Partner Relationship Management platform can make all the difference to how connected your partners feel to you.
- 5. Partner performance management:** The effectiveness of your channel program doesn't just come from your ability to target the right partner and engage them into your channel initiatives, but from your ability to drive more demand. Sales is a competitive sport, chiefly driven by performance rewards and recognition. Your Partner Relationship Management platform must include a set of integrated tools to manage market development funds, sales rewards, performance incentives and rebates.
- 6. Multi-partner demand generation:** What's the most effective way to drive demand? The very purpose of your channel is to sell more of your products and solutions. In the end, all roads lead to this specific activity: the multi-partner demand generation program. Your Partner Relationship Management platform again needs to have all of the strategic integrated marketing tools for Channel Marketing Management (CMM) that your partners might want to use to run co-branded campaigns. The other side of the equation is that the platform should also provide you with the tools to track what campaigns are going well, what needs

changing and why partners are succeeding or not, using the campaigns and tools you have provided them. One of the core requirements for best-in-class Partner Relationship Management is the ability to provide dynamic reports and analysis.

- 7. Deal registration:** If your channel program offers deal protection and registration, then your Partner Relationship Management platform must provide dynamic deal registration and approval processes. Some CRM systems provide this capability, but if your traditional CRM platform is not purpose-built for the channel, you may end up needing to invest a lot of time and money to make it work for your partner deal registration and protection activities. You need to weigh up whether you'd be better off switching to a purpose-built Partner Relationship Management platform to reduce upfront investment and ongoing operations costs.

Having formulated your strategy for integrated Partner Relationship Management, the next step is a complete assessment of your existing Partner Relationship Management approach. This could very well start with an evaluation of the tools and technologies you are using, but it should definitely include the channel programs and other sales and marketing resources that you have deployed. The more successful organizations tend to prioritize profiling their existing partner base. Once you have figured out which partners to focus on and how to engage them, pulling together the right channel programs—from training to certification to market development activities—can be aligned within each country in which you operate. Most companies have different levels of channel and channel management maturity from country to country. Your Partner Relationship Management framework must be capable of adapting to the current conditions in each country and lay out a roadmap for channel maturity development.

With all that behind you, now is when it's crucial to perform a full audit of your Partner Relationship Management technology infrastructure. It needs to be state-of-the-art in order to deliver the necessary flexibility, customization power and performance visibility. Unfortunately, most organizations are usually getting by with a mishmash of patched-together tools and technologies—that are not genuine Partner Relationship Management platforms. Yes, they might be used as partner portals connected to their existing CRM infrastructure, or as a marketing mechanism. But without a cutting edge Partner Relationship Management platform that can streamline and automate all necessary channel activities, provide complete visibility and deliver continual performance metrics, most channel management programs remain out of date and far from delivering on the true potential of Partner Relationship Management.



4

What Is a Best-of-Breed Partner Relationship Management Platform?

A best-of-breed Partner Relationship Management platform should address the management of the partner lifecycle in a highly efficient and effective way. The five core elements are partner recruitment, partner onboarding, partner training, partner marketing and partner incentives management. In addition to addressing these five core elements individually, a best-of-breed Partner Relationship Management platform should also be able to unify the lifecycle management across these five core stages. Let's take a look at these core elements and see how they fit together.

1. Partner recruitment: In this phase, a company needs to be able to upload a list of prospective partners collected from various sources or set up a search and social campaign to drive traffic, via both inbound and outbound methods, to a destination microsite. On this microsite, the company needs to articulate in a very clear way why a potential channel partner should consider joining the company's program. As a part of this process, the company may also hire outsourced telemarketing or event marketing, or an inside sales team may reach out to the targeted list of partners and engage in dialogue to get them excited about various aspects of the

company's partner program. This process of recruitment can last anywhere between a couple of months and several years, depending on the company's overall channel strategy. Often, large organizations end up acquiring smaller entities, which creates the need to re-recruit existing partners for new product categories. Here's the bottom line: A Partner Relationship Management platform should be able to provide an integrated set of outreach components—e.g., search, social, microsite, events—that inbound and outbound marketing teams can use to engage and excite potential partners and motivate them to join the partner program.

2. Partner onboarding: Once a set of partners have signed up for an existing channel program, the next step is to provide a high-quality experience to the partner base related to partner onboarding. During this phase, partners will need to sign a contract with the company based on the products and categories they will carry. They will also very likely have to put together a business plan, depending on what type of partner they are and the goals they are pursuing. The next step would be to make sure they can track their progress as they move through onboarding and initial training stages. The

vendor who has recruited the partners should also be able to track the status of partners at various stages. Automating all of these onboarding steps is critical to providing a high-quality experience from the very beginning as partners begin to engage with the vendor. A state-of-the-art Partner Relationship Management platform should address this need clearly and comprehensively.

3. Partner training: The third core element of the partner lifecycle is partner training. This applies both to new partners and existing partners. Very likely, a company with a robust channel program is constantly introducing new programs, new products, new offers and new pricing strategies. Accordingly, channel partners need to be continuously trained on various aspects of the changes a company is making to its channel program. This is where a learning management system (LMS) can play a huge role. A best-of-breed Partner Relationship Management platform should provide modules for course creation, course management, learning path management and certification management. Training is a very important aspect of Partner Relationship Management. A highly trained partner also tends to be a highly satisfied and successful partner. Therefore, it is critical to be able to create various training programs on a regular basis. It's also critical to use other integrated marketing tools like search, social, events, microsites and so on to promote training programs and keep partners engaged in various aspects of training.

4. Partner marketing: Once onboarding is complete and the partner is engaged in various training programs, the next step is to focus on generating leads and driving demand. This is where partner marketing and channel marketing automation capabilities come in. A best-of-breed Partner Relationship Management platform should provide an integrated set of through-channel marketing and/or through-partner marketing automation tools. Such capabilities should include end-user-facing search marketing, social marketing, microsite marketing, event marketing, video marketing and various other digital and analog marketing tools. When partners have the ability to use preloaded campaigns and assets and quickly set up co-branded campaigns and launch them to their target installed base of clients, they are well-positioned to drive the effectiveness of their partner marketing initiatives, whether those initiatives are B2B or B2C. Most partners do not have much in the way of marketing resources; therefore, in addition to a marketing automation platform, a vendor needs to consider providing marketing concierge services—either insourced, by leveraging internal marketing teams, or outsourced to an external partner marketing concierge company like ZINFI. In fact, a partner marketing automation tool and a partner marketing concierge program are probably the two most important components a partner can use for

generating leads. As such, a Partner Relationship Management platform should be able to address both capabilities by providing an integrated set of partner marketing tools as well as automating marketing concierge activities and processes.

5. Partner incentives management: To address the final core element of Partner Relationship Management, vendors need to be sure their partners are continuously trained and informed about new campaigns and programs and incentives that are being loaded into the platform on a regular basis. Performance-based incentives are essential to generating leads, and a unified approach to partner incentives management is critical. Application modules like market development funds (MDF), co-op management, rewards and rebates are key elements in automating incentives programs where a partner's performance can be directly tied to the rewards or incentives they can earn, both at the individual level of a sales rep or technical person and at the company level where the company can earn additional rebates and/or margin when they hit specified sales targets.

To be successful, any partner program requires several key elements. It requires a structured channel program. It requires clear channel policies so partners know exactly what they need to do to perform successfully and how their performance is going to be measured and rewarded. It requires clear programs that address both technical and non-technical aspects of the channel program. It also requires a platform which enables a unified approach to channel management. A best-of-breed Partner Relationship Management platform can make a huge difference. Companies that have deployed, or are in the process of deploying, point solutions in the attempt to create a patched-up partner portal or partner management system are likely to regret it in the long run. They will end up spending a lot more money and end up with a far inferior partner experience and internal experience than they would if they were to consider one of the new best-of-breed Partner Relationship Management platforms that are currently being offered in the marketplace by ZINFI and others.

“ *The five core elements are partner recruitment, partner onboarding, partner training, partner marketing and partner incentives management* ”



5

Why PRM Software Needs To Have Great Incentives Management Capabilities

Over the last decade or so, a new category of software called Partner Relationship Management software or PRM software has been evolving rapidly. What's the primary driver behind this evolution? Organizations are recognizing the need to build a direct sales force that can increase their reach and drive sales at a lower cost. In this chapter, we will explore how to effectively manage incentives programs that are designed to enhance partner behavior and performance. As part of that discussion, we'll examine the core requirements and capabilities of PRM software in more detail. But before we begin to specifically address incentives management, let's talk a bit how the complexity of channel management affects incentives programs.

At a high level, when a company is selling through an indirect reseller channel or a franchise network in multiple cities or even countries around the world, it will likely have to deal with various types of partners who sell into different segments and verticals, and these partners may have different sales philosophies. Some may sell a lot, some may sell a little and some are in between. Different organizations may have different sales requirements.

Most importantly, the sales programs may also be changing on a quarterly basis. As an organization introduces new products, and as it acquires new companies and capabilities, it may have to drive sales by launching new programs designed to change behaviors and by offering rewards for specific behaviors. Just as employee incentives are critical in driving performance within an organization, partner incentives are an essential element in driving the performance of partners.

There are basically three types of incentives programs that companies need to manage:

- 1. Market development funds (MDF):** These are funds that are given to a partner—usually based on their sales volume—to engage in additional marketing activities to generate demand.
- 2. Rebates:** These are provided when a partner's sales exceed a specified level: the higher the level of sales, the larger the rebate and the better the partner's margin.

3. Sales rewards: These are typically given to individuals who achieve large sales volumes. The goal with these rewards is to ensure that each sales rep or technical rep is financially incentivized to drive adoption of certain products and solutions.

Interestingly, most vendors today still manage these incentives using email or Excel files or other types of general-purpose tools, and they lack an automated infrastructure to drive the process. Because these tools are not integrated and not designed specifically for handling partner relationships, managing and measuring the ROI from incentives programs is a major challenge for many organizations—and that's where PRM software can make a significant difference.

How can PRM software solve this problem? It allows a vendor to significantly streamline activities associated with people, processes, programs and automation.

Programs: Channel programs tend to fall into the categories we discussed earlier: MDF, rebates and sales rewards. For these programs to be effective, they need to be closely aligned with sales and marketing objectives. For example, when a company launches a specific product, it may want to provide incentives of various types or levels simultaneously. They may offer development funds to a specific group of partners who are most capable of selling those products. In addition to MDF, they may give rebates to partners that sell at a certain level. They might also offer sale rewards to reps, who will likely have to learn how to sell a new product and may be motivated by financial incentives to do so. When managing incentives at these various levels, alignment of various programs is critical. That's where PRM software comes in, giving vendors an easy way to quickly set up an incentives program, track it over time and improve it.

People: When we talk about incentives, we are not just talking about partners. Incentives may also be provided for internal sales people, channel account managers, distribution managers and other people from within the organization who are supporting a partner in their efforts to sell something new or sell specified products. In that case, an incentives management system should allow the vendor to set up sales incentives and track performance, not just for external entities like their channel partners, but also for their own internal personnel. Again, PRM software can help significantly.

Processes: When a channel program needs to be set up, typically it is done manually. Perhaps a campaign site is created, an email goes out and sales people may be given

scripts to use as they reach out to educate partners. Good PRM software will allow you to easily automate and streamline these processes. For example, vendors can use the software to set up microsites with different channel programs and incentives programs, and it can accommodate strategies to drive these programs via sales kits and other sales enablement tools in an efficient, compact way. Once programs have been launched, PRM software can provide tracking tools to monitor adoption rates at a detailed level. How many partners are engaging in a specific program? How many have signed up for additional training? Have they set up demos of products and services? How effective are the programs in terms of sales? All of this can be measured and tracked over time so that organizations can see which programs are most effective.

Automation: When the goal is to streamline the management of incentives via programs, people and processes, automation is what makes it all happen. Automation can be a huge help to vendors who wish to track their relationships with their partner base in an integrated and efficient way. Automation allows them to run incentives programs across multiple countries, various types of partners, different segments and verticals, and organizations with different sales philosophies and changing sales requirements. With PRM software, companies can automate and keep track of these diverse and dynamic elements in a single online interface, thus reducing the labor costs involved in managing multiple programs simultaneously on the vendor side, as well as increasing the effectiveness of the programs and boosting ROI. The vendor can see at a glance which programs are working well and which are not, and then decide which programs to drop or continue.

These are just a few of the ways in which PRM software can significantly help vendors manage their incentives programs.

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6

How to Select a PRM Software Vendor

Many organizations selling through the channel today are trying to determine how best to automate their Partner Relationship Management (PRM) process. In order to do so, quite a few are getting online and searching for “PRM software.” When you do so, multiple vendors pop up. How do you distinguish among them? And how do you select a PRM software vendor that can satisfy your needs? In this chapter, we will explore in an objective way five key capabilities that PRM vendors must provide in order to meet the needs of most organizations.

1. Flexibility, localization and scalability: When you think carefully about PRM software and what it is supposed to do, you realize its main purpose is to truly automate the PRM process end-to-end. True PRM automation not only brings a structured approach to partner recruitment, partner engagement, partner enablement and partner management, but it also offers visibility and scalability on a global level. A company that automates PRM processes should be able to deploy a common set of programs globally and execute them locally in each country using local languages. An organization that’s selling through the channel needs to be able to meet

the unique requirements of each country where it operates. While much of the time partner programs are consistent across all countries, it’s important to remember there is a degree of variability among different geographies. Therefore, any organization selling through the channel on a global scale needs to be certain its PRM vendor can offer flexibility, localization and scalability across multiple markets.

- 2. Modularity:** Most organizations selling through the channel today have some level of existing infrastructure in place. Very rarely would a company find it desirable or practical to rip out and replace everything they have in place. As a result, the PRM software vendor must be able to provide a modular architecture whereby an organization can pick and choose which PRM software modules they want to deploy, and decide which they will configure first and then turn on successively. Modularity is a key capability for a PRM software vendor.
- 3. Channel Marketing Management capabilities:** While most PRM software vendors provide some sort of functionality for partner records management, business planning, contract management, training management and incentives management, almost none — except ZINFI — provides full

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integration of partner management capabilities. Why is this important? Once you manage “market to” activities such as partner recruitment and partner engagement, which are focused primarily on training, and partner management, which is organized around partner incentives, you eventually need to turn your focus on enabling partners to drive leads and build pipelines on their own. Channel Marketing Management is a natural extension of PRM that completes the Partner Relationship Management framework. Therefore, a PRM software vendor must be able either to successfully integrate with an existing partner marketing tool or provide additional feature sets with incremental cost to turn on multi-partner demand generation capabilities.

- 4. Multi-tenant architecture:** While most PRM software vendors provide a basic framework for multiple PRM modules and partner records management, very few provide a complete, CRM-like capability which allows not only the channel management folks from the organization—e.g., a channel account manager or a business manager—to manage the partners, but also provides a structure that can be deployed on the partner side—by, for example, a partner marketing manager or a partner sales rep—opening up access to the information in a seamless way within the PRM software. Almost no vendors today provide this specific capability. A company can spend millions of dollars configuring their CRM infrastructure to do this, but a state-of-art PRM software vendor like ZINFI can provide this capability right out of the box.
- 5. Dynamic reporting engine:** While automation is the core objective of a PRM software platform, it must also provide a dynamic analytical engine that allows the organization to clearly understand and continuously monitor where investments are being made, which partners are productive, what programs are working, what activities have been completed, and what projects are coming up and moving forward. Without a comprehensive analytical dashboard and a reporting engine, a PRM software platform will never realize its full potential. That’s why it’s absolutely essential that the PRM software vendor can offer a reporting engine that is robust and dynamic, and able to produce custom reports on the fly.

The channel is an incredible asset. Companies that are selling indirectly to businesses or consumers need to ensure they have complete visibility into their partner’s productivity across the entire partner lifecycle they are trying to manage. PRM is managed via four critical steps—partner recruitment, partner engagement, partner enablement and partner management— but without an end-to-end, integrated and modular PRM software platform, no organization can successfully harness the power of their channel. Organizations that wish to automate their PRM process should look for the five capabilities mentioned above. In addition, they should make sure the PRM software vendor they choose is global in its reach, can demonstrate robust financials, has deployed similar-scenario systems with multiple existing clients and can dynamically adapt and configure the platform to address a specific set of needs.



7

Ten Channel Marketing Metrics That Truly Matter

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

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

three core dimensions, measuring ROI from partner marketing, end user marketing and expansion of reach.

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

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

4. **Partner portal effectiveness:** The partner portal plays a critical role in communicating to partners what is going on with the various aspects of the company's channel marketing. The portal also provides partners with access to all necessary tools related to program components like marketing, sales and incentives.
5. **Sales reach:** The very purpose of a channel is to extend reach, but very rarely do companies run territory analysis to understand over- and under-penetration from an end-user demand perspective. Sales reach is an essential metric when it comes to channel marketing program selection. If you don't understand what is selling where, program selection and execution is a little like shooting in the dark.
6. **Return on incentives:** This very important channel marketing metric measures the effectiveness of three core incentives programs: co-marketing funds or market development funds (MDF), sales rewards and rebates. Without a proper Partner Relationship Management platform, it is almost impossible to track these metrics dynamically. That's an important consideration, since most channel incentives change dynamically on a quarterly and bi-annual basis. Companies that can track incentives dynamically can make rapid adjustments, quickly realigning behind successful programs and redirecting resources from programs that are not working.
7. **Partner sales velocity:** This is obviously a channel sales metric, but it is also an important indicator for effective channel marketing. Since marketing enables sales—with customer awareness, new leads and closing tools—it's important to understand which partners are increasing velocity, and which marketing programs and tools are associated with those successes.
8. **Partner repurchase rate:** When it comes to top-tier partners in a broadly distributed channel, most companies have a good sense of the repurchase rates of their top partners. However, this is a very important metric to track for partners who are not repeat buyers of the company's products and solutions. Why? Well, when you look at this output metric in light of the relevant input metrics for channel marketing mentioned above, you will enhance your understanding of what is driving revenue forward (from a partner perspective) and what is not.
9. **End-customer repurchase rate:** We know that two core factors increase end-customer repurchase rate: solution value

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

10. **Partner satisfaction rate.** Finally, one of the most important channel marketing metrics measures partner satisfaction rates. An effective channel marketing automation platform should provide dynamic online survey tools and capabilities that can track partner satisfaction rates and core drivers in an effective way.

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

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8

Five Core Areas for Deploying Channel Marketing Automation

What is channel marketing automation? It's about automating core channel marketing process steps that allow vendors to recruit, onboard, train, enable and manage their partner network or channel network on a worldwide basis. "Partner" refers to resellers, systems integrators, value-added resellers (VARs) and others in the technology or manufacturing channel, or dealers, agents and other types of partners in other industry segments. With the advent of SaaS-based automation software, it is now quite easy to deploy worldwide channel marketing automation in a step-by-step manner. However, to be successful in this effort, companies need to think through the core areas they want to focus on first and then deploy the channel marketing automation tools sequentially.

The most logical way to begin is to align the automation needs with the business needs of your organization. But before we talk about that alignment, let's take a step back and look at the overall partner lifecycle management, which is independent of channel maturity, but highly dependent on the company's ability to drive sales through a channel network. Partner lifecycle management has five basic steps: partner recruitment, partner onboarding, partner training, partner enablement (marketing and sales) and partner

management. Let's go through these areas step-by-step and see how channel marketing automation can help in each area.

- 1. Partner recruitment:** With partner recruitment, it's essential to think about the process—whether you are recruiting resellers, agents or dealers who are reselling or distributing products from a vendor—as something similar to the process of acquiring new customers. In today's digital marketing environment, recruitment needs to happen using both inbound and outbound marketing techniques. Therefore, channel marketing automation needs to address the core process steps related to search, social media and other online digital marketing, including email and events.
- 2. Partner onboarding:** Once partners have been recruited, they need to go through a set of core steps, a process that also requires automation. Channel marketing automation software should be able to guide partners through these steps. The first step in partner onboarding is signing onto business contracts. The partner must agree to the terms and conditions related to the channel program. The next step focuses on putting together business plans so the partner can communicate to the vendor how they will sell, market and support the vendor's

product or solution. The third onboarding step consists of partner training, and the final step relates to incentives, so that when partners are fully trained in the sales, marketing and technical areas, they can learn about the channel marketing incentives that are available, such as market development funds, rewards and rebates.

- 3. Partner training:** Almost every vendor today involved in B2C or B2B marketing provides enormous amounts of material that channel partners need to go through to learn how to market, sell and provide support for the products and services they are selling. A channel marketing automation platform should be able to provide a complete learning management system with both training and certification management modules integrated into the system.
- 4. Partner enablement:** There are two core dimensions here that channel marketing automation needs to address: 1) marketing—driving demand and creating brand awareness, and 2) selling—following up on leads and closing them. Whether we are talking about in-store sales in the B2C environment or face-to-face closing in B2B sales, partners need enablement tools in both their marketing and their sales efforts in order to consistently drive demand and close sales. The right channel marketing automation platform can have a significant impact on these efforts.
- 5. Partner management:** This is probably the most important area of channel marketing automation. When we refer to partner management what we really mean is managing partner performance. Managing partner performance is very similar to managing the performance of an employee. Certain metrics need to be in place, and they should be tied directly to the goals and objectives specified in the business plan so that performance can be measured in a meaningful and objective way. In addition, the vendor needs to not only provide incentives like rewards and rebates, but also automate them to streamline both internal and external engagements and activities.

Once you have identified and understood these five key areas related to channel marketing automation, the next step is to think about how you want to deploy automation in your organization. There are at least a couple of key factors to consider. First, you need to recognize that your partner tier management will likely vary across different geographies and across the different verticals that you serve. For example, you may have specialty VARs for supporting healthcare, retail, insurance or real estate. Your tier management will probably be very different from one region to another, because these verticals vary considerably by region. So it's important to carefully think through how your channel tier varies and therefore how your channel management approach will vary in different regions around the world. This will have a big influence on the sequence you choose for channel marketing automation deployment. Another important factor to think about as you decide

on sequencing your channel marketing automation deployment is the overall maturity of your channel program. If you don't have a structured partner recruitment program already in place, it may not make sense to move up automation into partner recruitment and onboarding. On the other hand, if you do have training but don't have a structured certification program in place that relates to partner performance management, it may make sense to start with what you have, automate it and make it work before you start defining additional process steps such as recruitment, onboarding, management or different pieces of enablement. The best place to start is with what you have today—what is working today—and focus on making it more efficient. This approach creates less inertia in the organization as it undergoes the sometimes-difficult process of adopting new technology and a new platform. It also gives you clear visibility and metrics about an area you already know well, ultimately creating the foundation for defining process steps that are actually missing or not clearly defined and then automating them in a sequential order that makes sense. It's essential to think this through in a structured way to achieve success in channel marketing automation.

If we step back and look once more at the core areas for deploying channel marketing automation, we should begin to recognize the importance of understanding Unified Channel Management and deploying automation in stages. Rome wasn't built in a day. It doesn't make much sense to try to automate the channel marketing process end-to-end all at once. Instead, adopting a one-to-three-year vision of your automation project will give you time to take a careful, structured approach and make it a reality for your organization. Keep in mind that size matters—the smaller the organization, the faster you can automate and the more control you can exert over the process. The more revenue that's flowing through the channel, the more likely that multiple business units and product lines are involved, as well as multiple functions across different geographies—all adding to the complexity of deployment and slowing things down. That's why it makes sense to pick pieces to automate, especially in larger organizations. Automating everything end-to-end makes much more sense for smaller organizations, but even then the deployment is likely to work best in carefully considered stages.

Finally, once you have carried out your automation strategy that may last one to three years, don't neglect to reassess your progress and the alignment of your automation strategy with your business needs on an annual basis. This step ensures that the channel marketing automation becomes a means to an end rather than an end in itself. Aligning channel policies, programs and the channel marketing automation platform on a continuous basis will not only give you better results, but also enhanced visibility and control, which are essential in a highly chaotic channel management environment.



9

What Does Your Channel Marketing Automation Platform Need to Succeed?

Channel management is complex. But let's not forget that with the right channel management solutions you can tame the complexity and truly unleash the power of the channel. That's exciting. When you begin thinking about various types of channel marketing solutions, it's helpful to think in terms of two key categories: the channel marketing automation platform you will deploy and the channel marketing services you will require. These two components should be designed to work together to provide an integrated lifecycle management approach to channel marketing.

In this chapter we will explore the core components of channel marketing solutions that you should consider to be successful. So let's begin with channel marketing automation. How does it fit in with the overall channel marketing solution? Lifecycle management in channel marketing really needs to address several distinct areas: partner recruitment, partner training, partner enablement and partner management, which focuses primarily on incentives management. If your organization is operating on a worldwide

basis, the complexities involved in these four lifecycle stages—recruitment, training, enablement and management—require that you leverage an automation platform that can replicate your core processes across multiple countries without worrying about having to train various team members in multiple countries at various times on the same topics, issues and capabilities. A channel marketing automation platform automates core workflow in these four areas and will doubtless be an integral part of the overall channel marketing solution you need. An effective channel marketing automation platform can also reduce your operating costs substantially.

When you are trying to put together a set of channel marketing solutions that really address your core channel growth and productivity needs, keep in mind that before you select and deploy a state-of-the-art channel marketing automation platform you must have your core channel programs properly defined and structured, and you must have documentation available so you can automate each of the four lifecycle stages we have identified

earlier. Make sure you have a clear view of the approach and the policies you want to apply to recruiting partners, training them, enabling them through integrated marketing tools and tactics, managing them by providing incentives and aligning those incentives with partner performance.

Now let's talk about how the channel marketing services component fits in to your overall channel marketing solution set. The basic question here is: What are you going to insource and what are you going to outsource? When you consider insourcing a specific set of channel marketing services for your channel marketing solution kit, you need to determine what your overall goals are—for the year at minimum, or preferably for the next three years. Are you primarily trying to expand your reach? You'll require many more partners to accomplish that, and therefore you'll need to take steps to drive recruitment. Do you already have a rich partner base across multiple countries? You may need to do a better job of making them aware of the latest products and services you've rolled out so they can do a better job of selling them. Do you want to drive performance through incentives? You'll need specific programs to provide those incentives like market development funds (MDF), rewards, rebates and the like. Here's where you have to carefully consider what elements of your channel marketing solution make the most sense to address internally, and what elements you would be better off outsourcing to marketing agencies.

For example, when it comes to partner recruitment, if you are undertaking a specific country-level effort, you may be better off outsourcing the entire component to a reputable agency that can drive the recruitment campaign on your behalf, and hand over those contacts to your existing sales infrastructure. Similarly, partner training can be a country-based effort, or it can be a multi-country effort tied to a new product launch or acquisition your company has made. When you're rolling out certain parts of your training you need to figure out which parts are core elements you will keep on running every year; these parts you will likely want to insource. But if there is some incremental training you want to develop and you need an agency to drive registration—whether through online events or offline roadshow-type events—it may make more sense to outsource that. My point is that it's essential to think about these requirements in a structured way in order to figure out which channel marketing services make sense to create internally and which ones make more sense to outsource.

Now let's step back for a moment: As you put together your overall channel marketing solution, you have to think through how your channel marketing automation platform actually works together with your channel marketing services. If you tend to outsource a lot of activities to an external agency, you may want your channel

marketing automation platform to have a strong marketing concierge capability. When marketing concierge automation is an integrated part of your channel marketing automation platform, it's much easier to make sure that all your agencies around the world are following the same structured approach and process. The way you touch partners in Boston or Beijing or Bombay should follow essentially the same methodical approach in each geographical setting. This is where channel marketing concierge automation capabilities can be a big help.

Similarly, if you are offering incentives programs across multiple countries, while you may have a similar rewards and rebate structure, the currencies you use in Japan are going to be different from those in Europe or North America or Latin American. You likely need a platform that can address your global currency requirements. You also need a way to make sure the marketing agencies you're hiring in multiple countries are fully trained on such a platform. Again, planning all this out in a structured way increases the likelihood that your channel marketing solutions can ultimately prove successful.

Finally, as you consider global deployment of a channel marketing solution and determine how a channel marketing automation platform might work best with a set of channel marketing services, you will also need to make sure the vendors you select for both are adaptable and creative, and are willing to work together to constantly evolve as your channel marketing program evolves. As your needs change, as your business direction shifts, as your strategic requirements evolve, both the supporting agencies and the supporting platform will need to be able to evolve too.

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10

How to Drive Adoption of a Channel Marketing Automation Platform

Vendors selling to a channel need to enable their channel partners to generate leads and drive demand for their products and services. This has been a challenge for almost all vendors, whether they are selling to vendors or consumers. While partners are a great fulfillment arm, few of them generate enough leads to drive demand on their own. To address the problem, more companies over the past few years have been deploying channel automation platforms. However, the adoption of these platforms in the channel has been quite poor, and this has led to a lot of speculation and frustration. It has also led a number of companies to switch providers of automation platforms, thinking that the move from one platform to another might help them attain higher levels of adoption.

However, the issues generally lie elsewhere. Yes, the channel marketing automation platform needs to be robust, scalable, easy to use, etc., but only rarely is the failure to achieve widespread adoption of automation in the channel tied directly to the channel automation platform itself. In this chapter, we will explore the core issues that underlie channel marketing automation adoption and outline steps vendors can take to generate ROI from the

investment they are making in channel marketing automation platforms.

What are the primary barriers to adoption?

1. **Lack of partner resources:** Most channel partners have neither resident marketing experts nor sufficient resources to create and execute campaigns on their own. As a result of that, most marketing channel automation platforms that are introduced into the channel are simply not used. The problem is not that the platforms are difficult to use, but that partners don't have the resources—namely, time—to sit down and learn a tool and then go execute a campaign or a program. Also, in the case of large partners that do have sufficient resources, often those resources go into vendor management and relationship management rather than into the proper use of channel management automation software.
2. **Lack of horizontal campaigns:** Vendors typically deploy a marketing channel automation platform with new or niche products. Partners, on the other hand, generally do not want to squander whatever limited time and resources they have

on programs that are not time-tested. In fact, one of the main challenges in spurring adoption of channel management automation is that deployment is often tested with campaigns that simply lack excitement on the partner side.

3. **Lack of partner incentives:** Vendors will often have several campaigns, assets, etc. uploaded on the marketing automation platform, but without aligning any specific incentives with those campaigns. As a result, partners fail to see the benefits of putting in all the hard work of executing a campaign when the easiest thing they can do is just have the vendors hand over qualified leads. From the partner perspective, that's a more efficient way to go.
4. **Lack of internal organizational alignment:** It's quite common in many organizations for the internal sales team or channel account management team or partner business management team not to be fully aligned with the channel marketing management automation system. In those cases, even when marketers load up a campaign on the platform, without inside sales or channel sales buy-in the campaign doesn't go anywhere and the channel marketing platform is rarely discussed in a face-to-face partner meeting or in a phone conversation. As a result, channel marketing automation remains a "sidebar" conversation rather than a mainstream focus.
5. **Lack of public celebration:** Most vendors have annual partner conferences where they try to promote the use of the channel marketing automation platform. However,

most partners attending such conferences choose to attend such events for other reasons. Very rarely do they attend in order to check out all the cool features and functionality of a channel marketing automation tool, or to investigate the campaigns in such a tool or the services provided around it. Thus, the platform rarely gets promoted properly. Also, organizations do not necessarily celebrate the use of the platform to access such campaigns or assets in a global format—drawing attention to the fact that partners who are using it are actually getting good results.

What are the best ways to address these barriers to adoption?

1. **Deployment of partner marketing concierge services:** Because partners typically lack extensive marketing resources, one of the most important things for vendors to budget for and invest in is shared marketing resources that partners can use in bite sizes. Many vendors or organizations selling to the channel try to save money in this area, asking the internal sales people or the account management team to become the marketing concierge arm of the organization. This is an absolute failure in the making, because most of the time the sales teams are too busy executing their own goals and objectives, and don't have time to go learn a tool or a set of campaigns and thereby drive automation of the channel marketing automation platform by partners. Thus, a critical success factor in adoption of the channel marketing tools is



either outsourcing to a third-party concierge service or providing concierge services internally.

2. **Quarterly updates of campaigns around products that sell:** It's incredibly important to have fresh campaigns available—at least two to three campaigns per \$100 million of business the channel is doing on a quarterly basis. Why that number? For every large organization, a typical product line varies between \$100 million to \$200 million. From a solutions selling perspective, if there is a quarterly refresh going on—perhaps the product is getting upgraded or there's a pricing change or a promotion—there is something that can be loaded onto the platform that a partner can use to drive communication and lead generation from the company's installed base and potential prospect base.
3. **Alignment of partner incentives:** As we touched on before, aligning partner rewards, rebates and market development funds (MDF) behind the adoption strategy of the channel marketing automation platform is absolutely critical. Let's say a vendor has a program focused on driving upgrades of existing software. When the vendor rolls out that program, it is also essential to make sure that the MDF—whether for telemarketing or event marketing or online, search and social marketing—are available for partners to use and align with their own interests, so they can tap into the funds to drive execution. In this case, marketing partner concierges from a third-party agency could offer substantial help, taking advantage of the marketing services agency's infrastructure. On top of that, if there are sales rewards whereby partner sales reps get additional incentives to sell and close deals, as well as additional backend rebates for partners, then the entire organization can be fully aligned behind driving a campaign within the marketing automation platform. This is another area where partner marketing concierges can help by coming in and educating partners, letting them know what campaigns they can pick and where their company can get extra rebates or margin, and explaining how their the partner's reps can get reward dollars or loyalty points.
4. **Celebrating success widely:** We've already talked about this as a major challenge to adoption. But addressing the challenge is not difficult. A quarterly webinar sharing where partners have used certain campaigns, how they have generated hot leads in the pipeline, how they have closed leads, how many leads they have closed and what the largest deals or opportunities are can have a huge impact in promoting the efficacy of the channel marketing automation platform in driving demand. This is not a lot of work, and a partner marketing concierge can easily do it, but it can have a significant impact in building credibility in the channel, as well as aligning the sales team from within to make sure they're actually seeing results from the investment that the channel marketing team is driving. Finally, when considering how to celebrate success, the organization also needs to reward employees internally—whether it's a channel account manager or a channel business manager—for the right behavior in driving demand using the right tools and the right campaigns in the right way.

“The adoption of channel automation platforms has led a number of companies to switch providers of automation platforms, thinking that the move from one platform to another might help them attain higher levels of adoption”

Yes, it can be hard to drive adoption of the channel marketing automation platform in the channel. However, it can be accomplished with a systematic approach. Certainly the barriers I've mentioned above might give rise to perceptions that the challenges are daunting, but the solutions I've suggested are straightforward and attainable, and any organization can deploy them in 90 to 180 days.

One last tip: When deploying a marketing automation platform, the organization must start with a single region only. There is likely to be internal pressure to roll out a platform globally very quickly. However, without the alignment of partner marketing concierges, quarterly refresh of campaigns, partner alignment with incentives, alignment of account management infrastructure—and without figuring out meaningful ways to celebrate success—the results from one region may not be compelling enough to drive adoption in other regions. On the other hand, if the vendor is successful in adopting the platform in that first region, other regions can easily be convinced to follow suit and replicate the execution model by looking at what's working and by localizing campaigns and incentive structures for a specific region or country.



11

Using Integrated Marketing Tools Effectively for Channel Marketing Automation

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

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

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

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

1. **Lead management:** While most channel marketing automation platforms offer basic capabilities to upload leads (or records of potential prospects or existing customers) a true lead management platform needs to include a traditional customer relationship management (CRM)-like interface, for

two main reasons. For ease of use, the lead management system needs to connect both to the technology vendor's and the partners' own CRM system in order to enable data to flow seamlessly back and forth. Most partners today use a CRM system such as Salesforce.com, so providing them with a CRM-like interface for lead management will drive adoption faster.

2. **Lead distribution:** Most vendors provide leads to their top tier partners, but to build pipeline and promote best practices beyond this rarefied level, it's critical to create a competitive environment for lead distribution. The channel marketing automation tool must be able to distribute leads to pre-defined partner sets, whether to a small segment or to all partners—e.g. in a shark tank mode.
3. **Campaign-specific tools:** Not all tools are relevant for everything, so it's important to determine the purpose of each campaign. Social and search marketing are effective for awareness generation. Email, events and content syndication showcases are primarily used to generate engagement with prospects. Deep-dive training or product usage videos work well for gauging trial interest and qualifying leads. Also, depending on the target segments—SMB, midmarket or enterprise—one or more tools may be needed to make a campaign productive.
4. **Multi-touch campaigns:** Most mid-market and enterprise buying has a long evaluation cycle. In order to stay in the game—and not just be included at the last stage for price comparison purposes—a channel marketing automation platform should have multi-touch capabilities. This is essential to automate drip campaigns and provide successive content-driven engagement stages to move the buyer along their evaluation process.

5. **Dynamic reporting:** You need to be able to measure what you get. If you cannot slice or dice the data from your campaigns in multiple ways you will not know—and your partners will not appreciate—what is really working in each campaign, and why some partners are more successful than others. Comprehensive, end-to-end, dynamic reporting functionality is critical to enabling continuous improvement and remedial action.
6. **End user-facing sales tools:** Generating leads is the first hurdle, but the next hurdle is actually closing the sale. Most vendors carry multiple products, and many of the end user-facing marketing and sales tools like battle cards, case studies or pitch sheets are scattered around in multiple places in the partner portal. Your channel marketing automation platform should be able to consolidate all relevant information in one place within the campaign, allowing your channel partner to easily locate what they need to take a lead through the cycle as quickly and efficiently as possible.
7. **Making results count:** The platform you choose must be able to provide channel partner stack ranking, just as you do for your own direct sales force, to identify who is building the biggest pipeline and who is falling behind. Sales is a competitive sport, and a ranking system will stimulate efforts while promoting the capabilities of your lead management systems.

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





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How to Empower Country Teams Using Channel Marketing Automation

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

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

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

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

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

channel marketing managers, distribution managers or channel account managers.

2. **Setting access rules:** The channel marketing automation platform should allow you to set access rules—i.e., define who can upload, edit, view and use content and campaigns for marketing activities.
3. **Assignment of campaigns by access rights:** You should also be able to assign certain campaigns and assets to certain groups and roles. This graded access and rights management capability is critical for your channel marketing automation platform, because providing personalized campaign access significantly improves partner experience and creates greater control and better reporting.
4. **Content localization:** Once you have uploaded global campaigns to the channel automation platform, your local country teams should be able to access this content to localize or customize it—without, of course, being able to change the master copies and assets. The ability to copy existing material from a global library and create a local content library is a must-have capability for your channel marketing automation platform.
5. **Campaign usage:** Your channel marketing automation platform should be able to track detailed usage reports that show who is accessing your global content, who is creating local campaigns and how they are working. This knowledge can be applied in many ways—for example in “reverse engineering” local campaigns. You might be able to take a successful local campaign and go global or regional with that material, with or without modification. Visibility into campaign usage is critical to drive better ROI both at a local and global level.
6. **Agency and concierge access:** Many large organizations use multiple third-party agencies and marketing concierge services, so the channel marketing automation platform should be capable of allowing those external groups to access campaigns and content in a secure fashion.
7. **Dynamic reporting:** In addition to usage, the channel marketing automation platform should also be able to track all necessary input and output metrics tied to your social marketing, search marketing, event marketing, email marketing or other marketing mechanisms.
8. **Single sign-on (SSO):** In addition to these core edit capabilities you should be able to manage access (add, delete, modify users, rights, etc.) in a dynamic way, either from your partner portal or via your channel marketing automation platform. Your channel marketing automation platform must have a single sign-on (SSO) connector.
9. **CRM integration:** Last but not least, for you to allow your country teams to access your content management system from your channel marketing automation platform, you will need to make sure data can flow back and forth from your existing CRM platform, whether it is on Salesforce.com, SAP, Microsoft Dynamics, Oracle or another CRM platform.

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

“Primary challenge for any reasonably large technology company with global presence that is marketing in a business-to-business (B2B) channel environment is making sure that marketing assets that are created centrally for global use can actually be deployed locally”



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Fifteen Channel Sales Metrics You Must Track

“What you measure is what you get” is a great business mantra. And when it comes to sales, it becomes much more than that: it’s a practice that drives the future sustainability and growth of a company. Of course, to make an impact metrics need to be applied across multiple business areas by deploying channel marketing automation. For example, if you are selling through a channel partner network, you need to look beyond simple sales out. Failing to track the critical channel sales metrics listed below could lead you down a blind alley where you end up not knowing what’s going to hit you next.

Channel success comes as a result of setting up realistic, if ambitious, expectations with your channel team and partner network, but these mean nothing without the ability to monitor a core set of performance metrics. Output metrics are driven by a set of processes, programs and people directly linked to their related input metrics. These will provide you with essential insights into what is actually happening in your channel. However, you need to correlate input metrics to output metrics in order to understand the impact of each of these metrics on overall results. A best-of-breed channel marketing automation platform should

enable you to track the metrics described below, as well as to use dynamic dashboard capabilities to run multiple analyses that will enable you to fine-tune your channel program for optimum results.

Here is a brief overview of the 15 core input and output metrics, and how you can use the data to drive profitable sales growth.

1. **Total and average revenue per partner:** This is almost equivalent to the commonly used revenue-per-employee metric. When you perform this analysis, you will see that productivity varies greatly across the top-, medium- and entry-level partner tiers. Tracking revenues on a dynamic basis is a critical first step towards improving sales engagement.
2. **Revenue mix analysis:** This is predominantly undertaken by product line, geography and territory. Most companies use this data primarily for market share analysis, but if you directly correlate the data with other partner input and output metrics you can draw a more complete analysis of partner engagement and potential.
- 3.

4. **Percent of revenue growth rate of partner tiers:** This is a high-priority output metric that you need to track in order to see how your partners are growing across your different product lines. The variables include partner level, product type and geographical location. The resulting data enables you to make strategic resource changes to drive better results.
5. **Gross profit per tier:** At the end of the day, success is about more than revenue alone. The key lies in the absolute profit that you are able to generate via the channel. Calculations of partner profitability vary greatly depending on how you are able to track your internal costs. These might include technical support, channel sales, channel marketing, programs, special events and more. You also need clarity about the relative levels of profit generated by the different partner tiers—e.g., how much is generated by your top 10%, 11%–25%, 26%–50% and so on, and what your relative level of investment was for each tier.
6. **Percent of year-over-year increase in channel revenue and productivity:** This is your ultimate measure of progress on a year-over-year basis. In order to do this you will need to be able to calculate your revenue growth, which all companies do, but beyond this you will need to factor in the detailed cost infrastructure required to support your channel, which at times is a bit harder to achieve due to product and process complexities. However, efforts spent in this area are critical to drive a much more finely tuned approach towards metrics-driven channel sales management.
7. **Percent of active resellers:** Most companies, whether they have a broad or a narrowly focused channel, have to deal with wide variations in sales per partner. It is important to be able to identify what portion of your channel partners are selling consistently quarter over quarter, for the past four quarters, as this will drive the next stages of program activity as you figure out how to increase sales out from the lower-performing partners.
8. **Channel attrition rate (% drop-out rate of active resellers):** If you have a channel partner network of a few hundred or more, the chances are that on an annual basis a portion of your network will stop selling your products and services. Tracking this attrition rate actively and analyzing who is leaving and why is critical to keeping a handle on the situation.
9. **Percentage of reseller base generating largest percentage of revenue:** Why is this important? Well, when you are selling through a broad channel, as most companies do, no matter how big your company is you are likely to have



finite resources and bandwidth. You will need to maximize return on channel sales resources, so knowing where it will be most profitable to focus is critical.

- 10. Percent of renewal rate on maintenance and service contracts:** Most companies selling through the channel today derive substantial revenues from add-on and renewal sales. While the channel remains a the primary way of fulfilling existing demand, partners tend to lack resources to monitor systematic contract renewals like subscription contracts, warranties or services. Therefore, your ability to track renewals and drive actions based on detailed data has the potential to greatly improve your top and bottom line. It is always easier to grow existing accounts rather than establish new ones.
- 11. End-user satisfaction with your reseller base:** As the level of complexity of technology products and deployments rises, it has become even more essential to ensure your partner network is fully trained and certified. At the end of the day it is the quality of technical engagement between your resellers and their end-users that drives customer satisfaction. It follows that measuring end user satisfaction on a regular basis is critical to understanding where you need to invest to overcome partner skills gaps and grow your channel's strengths.
- 12. Partner satisfaction:** Along with end-user satisfaction analysis, you also need to know where your partners stand in relation to your products, services and support. Your competitors are always on the move, so it's never safe to assume your partner base will feel the same from one quarter to the next. This understanding is essential to your ability to focus channel marketing and sales resources efficiently in order to drive optimum results. A simple integrated survey tool will help you capture your partners' experiences in a systematic way.
- 13. Partner certification rate:** This is a critical metric that allows you to measure the depth and breadth of your channel's capabilities. Organizations that use a learning management system (LMS) tend to have a more systematic and therefore easier way to track progress in this area, but even without a fully functional LMS you should be able to monitor certification rates using your Partner Relationship Management platform.
- 14. Return on market development funds (MDF):** This is a critical metric allowing you not only to eliminate wasted investment and focus on high-producing programs, but also to strategically align your marketing activities to and through the channel. Most companies that have a Partner Relationship Management platform combined with MDF tracking functionality can easily monitor expenditure versus results and drive improvements both globally and locally.
- 15. Graduation rates (from bottom-tier to mid-tier, mid-tier to top-tier, etc.):** The channel is a dynamic environment.

All the time, new partners are joining and a few partners are leaving, but you also have partners moving up from entry level to mid-tier and on to the top tier of your channel program. Making sure you know how and why this is happening, and remaining engaged in managing this movement proactively—as opposed to being a passive observer—is critical to maintaining a profitable channel growth model.

- 16. Total channel marketing and sales cost to channel revenue ratio:** This is primarily a measurement of efficiency and return on investment. In most organizations, the total cost of sales, including channel marketing and other investments, needs to be less than 25%–30% of revenue for a run-rate business to create a profitable growth model. However, if you are trying to build out your channel, this ratio is likely to be substantially higher during the earlier stages.

If you are using a basic CRM platform you may very well be able to track some of these metrics, but CRM systems do not provide the same essential functionality as a purpose built Partner Relationship Management (PRM) platform, which is designed to give you the end-to-end visibility necessary to track and manage all aspects of a channel management program. As part of your forward planning to build out a metrics-based, high-performing channel, it is advisable take a look at the rapidly evolving PRM tools that are now available in the market.

When it comes to channel sales metrics, we see various levels of maturity across our customer base worldwide. One constant, however, is this: Organizations that spend more time understanding channel sales metrics are more focused and probably undertake fewer initiatives, but they generally drive more growth per initiative. This is a qualitative observation across more than 50 of ZINFI's global clients. We would love to hear from you about what metrics you are tracking and how they are driving profitable growth for you.

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



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What is Channel Sales Management?

Over the past couple of decades, two major channel management automation platforms have attracted widespread attention: partner relationship management (PRM) automation and Channel Marketing Management (CMM) automation. However, the most important area in channel automation—an area that has been neglected and remains a major opportunity—is Channel Sales Management or partner sales management. If you are considering an investment in channel automation, you should look at Channel Sales Management automation first. Why? It's simple: If you can make your current reseller even 10% more productive (selling more at the same channel investment rate), the result will be a huge impact on both your top and bottom lines—and it can happen almost instantly.

Before we delve into the details, let's very briefly discuss Channel Sales Management and how you can make this happen, either through the infrastructure you have today or by investing in a Channel Sales Management automation platform. Channel Sales Management has two core points of focus: 1) contextual sales training and enablement (i.e., during the selling process), which leverages the relative wealth of sales resources vs. technical or marketing resources; and 2) buyer engagement tracking and

measurement to assess how the end buyer is engaged in the sales process.

In addition to this two core areas of focus, your Channel Sales Management program or platform should have other core capabilities such as a content management system (CMS) for you to upload and set up training materials, sales slicks, price lists, battle cards and other tools. But in the end, the primary focus of Channel Sales Management is driving sales productivity by using all of the content and resources you have today, making those resources available when the sales rep needs it, and gaining insight into the interaction and engagement with the end buyer. Why does all of this matter? Because of the following reasons:

1. **Sales people are overwhelmed.** Most sales people have to deal with half a dozen product lines, if not more. With the rate of changes that are happening in the market place, it is almost impossible for them to be fully conversant with every product or service they are selling.
2. **All sales people are not created equal.** While many great sales people are highly organized and can absorb a lot of complex content, they are not all equally capable. Therefore,

making relevant content available for them to learn from as a part of the sales process reduces the overload. It also makes them better learners in the long run.

3. Sales people should be treated as consumers of content.

Product marketing tends to create volumes of materials and content, but organizations rarely understand what is actually effective or not. When they have a system that allows content delivery in stages, as well as precise tracking of consumption patterns, product marketers can become much more effective in creating useful content

4. Sales people should be able to track engagement.

It is not unusual in the B2B selling process for buyers to disappear, leaving sales people wondering whether they did something wrong or whether the buyer simply lost interest. Disappearing buyers are not necessarily a reflection of the inability of a sales person to make the buyer confident. B2B selling is complex, and at times the decision process halts or slows down internally due to a variety of reasons. That's why it's so important for the sales person to be able to track interactions and outcomes in detail and gain a more systematic and nuanced understanding of what's working and what isn't.

5. Selling is a competitive sport. An effective Channel Sales Management platform can offer leader boards, gamification, rewards alignment, and other motivators to create a highly competitive—yet sharing—environment. Gone are the days where sales people are expected to smile, dial and close. Today most B2B sales people are assumed to be sales or solution consultants, roles that requires deeper knowledge of the customer's environment. This is where cross-learning and sharing are critical.

Channel Sales Management automation can be a big help in establishing a distributed sales team that connects, collaborates and communicates to become more effective. It can also create a highly competitive and transparent selling environment, and encourage increased sharing among reps and teams. The great news is there are multiple tools available for direct sales teams, and new Channel Sales Management automation solutions are being offered by several companies—including ZINFI.

A typical deployment cycle for Channel Sales Management typically takes two to three months. It takes about a month or so to organize content that is already available and tag it by sales stage and by product line. Once the content has been organized, the next step is training the sales team and making them aware of how to use the existing content and tools to track buyers' engagement. Once these two steps have been completed, a Channel Sales Management platform is ready for rollout and can start producing results.

“*The primary focus of Channel Sales Management is driving sales productivity by using all of the content and resources you have today, making those resources available when the sales rep needs it, and gaining insight into the interaction and engagement with the end buyer*”



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Why Channel Marketing Automation Focus Should Shift Towards Channel Sales Management

Over the past decade—and particularly over the past five years—many channel marketing automation SaaS startups have entered the marketplace with the hope of garnering the interest of channel organizations looking to drive more demand through their channel. The first-generation tools rightfully focused on a missing gap—marketing resources at the channel partner organization—and addressed the promise of channel marketing automation by providing ready-to-launch, co-branded assets and campaigns for partner organizations to use. However, even as they began to deploy a number of marketing automation tools, partners found they still needed to perform certain activities that require marketing resources or the allocation of resources from another area. As a result, with very few exceptions, most of these deployments delivered lackluster results. Organizations had switched channel marketing automation vendors in search of a better tool or platform but failed to address the need for a major behavioral shift in the partner base.

Partners are called resellers for a reason. They are not called remarketers. Most partner organizations (system integrators, VARs, resellers, franchises, agents, etc.) are resource-strapped and lack proper training, skills and marketing resources. So, despite the availability of sophisticated channel marketing automation tools, adoption of these tools has been tepid. That doesn't mean vendors should abandon these platforms and go back to the dark ages of ZIP-file-based asset sharing. However, it is the duty of the channel marketing automation platforms to rise to the next challenge and address the core issue of sales enablement.

It is fair to assume the channel will look roughly the same over the next five years as it did over the past five. Until and unless a game-changing platform suddenly appears on the horizon or some other disruption takes place, changes in the channel are likely to continue incrementally. Despite seismic shifts tied to the cloud, mobility and the digitization of buyers' engagement, it is highly unlikely that partner organizations will suddenly end up having

abundant marketing resources. Therefore, channel marketing automation platforms need to address this gaping hole that the lack of marketing resources presents and convert that challenge into an opportunity. Instead of looking at the glass as a half-empty (partners lack marketing resources), I'd suggest we look at it as a half-full (sales resources are available) and focus on enablement activities.

Most vendor organizations selling through the channel provide some mechanism for lead distribution. Whether the industry is automotive, real estate, insurance, finance, technology or pharmaceutical, chances are there is a program in place for multi-channel lead generation, capture and lead distribution. When these leads are distributed, vendors should make it a priority to ensure the partner organization is capable of closing those leads in a highly competitive environment. In reality, most leads that are distributed to partners are not properly nurtured and followed up to be closed. This testifies to a lack of training and enablement in the sales organization, and reflects a significant shortcoming in many channel marketing automation platforms that are offered today.

Once we accept this premise that there is major opportunity that can be addressed by investing in Channel Sales Management, the next logical question is to ask is: What is Channel Sales Management? Channel Sales Management is a critical step in Unified Channel Management. It is about developing and deploying an integrated process that guides partners through a logical sequence of steps or stages required to close transactions, from the simplest to the most complex. This means providing not only structured training but also access to the necessary sales tools at each stage of the selling process.

From a functional perspective, sales enablement includes partner training, access to digital sales assets, and the ability to send interactive emails and digital content to track buyer engagement. A marketing automation platform offering state-of-the-art Channel Sales Management tools should also provide deep business intelligence capabilities so that a vendor can continually track the effectiveness of sales programs, solutions content needed to close the sale, and all digital assets that play a role in the buyer engagement process.





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Partner Marketing Concierge Services: Learn Locally, Scale Globally

One of the realities of channel marketing, of which vendor organizations are all too painfully aware, is that the majority of channel partners do not have dedicated marketing resources. So, when a vendor wants their channel partners to run marketing campaigns, it is not only essential to provide a channel marketing automation platform, but also to give the partners the means to make it happen by providing partner marketing concierge services. Now the key question is, once this preliminary phase of deployment has happened, how can a vendor optimize ROI from their programs by learning locally and then scaling globally? This article looks at the key steps to be taken.

To build a state-of-the-art channel marketing platform, a vendor needs multiple core components – a channel program, partner profiling, channel marketing automation, partner marketing concierge services, proven and tested end user marketing campaigns, and marketing and sales rewards. The great news is that many of these elements can be replicated across multiple countries using a single, unified approach. While it's important to localize the language and content for each country, the program won't scale or provide sufficient return unless a significant portion

of the program dollars can be reused in multiple countries. Engaging a global partner marketing concierge organization is critical to make this scalability and localization a reality. Any successful channel development program requires the creation of a sequential approach to delivering various program elements, and should build upon the basic partner program framework elements, which should include partner recruitment, engagement, enablement and management strategies. Here, we will focus principally on one critical aspect of a channel initiative: how to enable partners to generate more demand by using partner marketing concierge services. The following seven core elements will help any vendor to use the same dollar to receive multiple returns.

- 1. Deploy Channel Marketing Automation:** Ensure that you deploy a platform that can be localized, and allow country teams to access, upload content and programs without being reliant on centralized, global teams. While global content can be easily uploaded and shared via a channel platform, an effective automation platform will enable the reverse to happen – when country teams can upload local promotions or campaigns to the platform. These can be tested in one

market, and if successful can then be deployed in other markets.

- 2. Leverage Horizontal campaigns:** The best way to get return out of campaign dollars is to figure out which campaigns have horizontal potential, i.e. which campaigns will be effective in multiple countries, enabling the use of the same graphical and creative assets in multiple languages. Many vertical campaigns – finance, real estate, healthcare, etc. – tend to be highly country-specific and tied to local market dynamics. So, to build momentum faster, look for horizontal campaigns that can be used in multiple countries.
- 3. Globalize core campaigns, localize in-country offers:** Any channel marketing automation platform should allow you to customize global content at a local level, for example, to include country-specific offers, before the country team pushes the global content out to the channel. A global partner marketing concierge agency can help with the localization process.
- 4. Develop menu-based campaign options:** Channel partners not only lack marketing resources, but also don't have the expertise to set up effective integrated or transaction campaigns without expending considerable time and effort. This is where menu-based offers can significantly help channel partners, providing a means to enable them to quickly select and deploy campaigns. Once you have analyzed what is working in one country, and that has the capability of being deployed in other countries, leverage your partner marketing concierge agency to roll out menu-based campaigns in other countries. For this, however you will need an outsourced partner marketing concierge to provide localized services in multiple countries.
- 5. Pick a partner marketing concierge vendor with truly global capabilities:** Having the right partner marketing concierge agency is critical for your ability to learn locally and execute globally. You need a vendor that can leverage the learnings from one market and, through its own program management and account management structure, rapidly share these learnings in other countries. The IT industry moves on a ninety-day quarterly cycle, and time is of the essence. Therefore, the speed with which your partner marketing concierge vendor can deploy its learnings to different countries can make or break a global channel marketing program.
- 6. Track ROI for global and local campaigns:** Assuming you have deployed a unified channel management platform that gives you comprehensive visibility of your programs, you will have ROI tracking capabilities that will help you quickly analyze the effectiveness of different programs in different countries. ROI data will help you understand which programs can be horizontally scaled so that you can rapidly deploy them in other countries via your partner marketing concierge.

- 7. Learn, Edit, and Do it Again:** It may take you a year or eighteen months to accomplish steps one through six, but after that you will have a significantly enhanced capability to learn in one country, improve in another, and repeat in further geographies in a very short period of time. This is the true value of 'learn locally and scale globally'.

Every company needs to focus on their core value proposition, and partner up with experts who can help them with their other contextual requirements. In some cases vendors have insourced their marketing concierge capabilities by hiring field marketing resources, but this is an expensive option. Significant cost savings and global scalability can be achieved by partnering with a reputable global partner marketing concierge agency.

ZINFI not only provides a state-of-the-art unified channel management platform, but also brings in local presence in multiple countries around the world, enabling vendors to deploy partner marketing concierge capabilities affordably and rapidly. Over the past ten years ZINFI's experience in multiple IT domains such as networking, security, virtualization, storage, application delivery and more has enabled us to provide a highly trained channel marketing team that can significantly augment a vendor's channel capabilities and increase ROI.

“

When a vendor wants their channel partners to run marketing campaigns, it is not only essential to provide a channel marketing automation platform, but also to give the partners the means to make it happen by providing partner marketing concierge services

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How to Provide Partner Marketing Concierge Help in Bite-Sized Chunks

Most channel partners don't have a marketing department, a marketing specialist, or even an outsourced marketing provider, and even if they do, these resources tend to operate not as marketing strategists, but more as vendor interface managers – handling multiple vendors and a variety of product lines. This is where a partner marketing concierge comes in.

It is fair to say that most channel partners don't really have the capabilities to execute vendors' marketing programs or even specific campaigns effectively. What's more, most channel partners don't receive enough market development funds (MDF) at the right time to hire dedicated resources for a specific campaign or program. While some large distributors and a few, very large channel partners may receive funding for certain marketing resources on an annual contract; this is more of an exception than the rule. It looks like an impossible dilemma, but there is an easy way around this: provide the channel with partner marketing concierge services in bite-sized chunks.

Setting aside their lack of marketing resources, most channel

partners don't even have any kind of marketing automation infrastructure to drive a flow of leads in a consistent fashion. As a result, most partners, if they do any kind of marketing at all, tend to default to running events from time to time, coupled with random email or telemarketing campaigns. When these don't produce leads or results, partners get frustrated with marketing and abandon their own efforts, as well as ceasing to engage on co-marketing efforts with vendors.

Over the past decade – following the lead of larger organizations like HP, Cisco, IBM and other major players – mid sized IT vendors have also started providing marketing tools, campaigns, assets and collateral to their channel partners. However, lack of dedicated resources on the channel means that adoption of these assets is very rare. The only way to overcome this impasse is to provide partner marketing concierge services to the channel base as an add-on capability. While the first step in enabling channel partners should always be the introduction of an end-to-end integrated channel marketing automation platform, without the provision of additional marketing enablement services, for the most part the potential of these platforms remains unrealized.

While top tier partners usually have access to market development funds (MDF) (please read our article [What Can You Do to Drive Your Market Development Funds Utilization?](#)), most do not take a strategic approach towards marketing. They tend to engage on transactional campaigns like email marketing or event marketing, which may work for small and medium deals but fail to deliver for higher value solution selling. We have recently seen some of the larger IT vendors starting to provide partner marketing managers to channel partners via their field organization, but this is not a scalable model above and beyond a handful of partners.

So, if your channel is doing 80% of their sales via 5-10% of your partner base, and the revenue generated per partner is in excess of a few million dollars per year, then dedicating marketing personnel to specific channel partners can provide ROI. However, that leaves hundreds or thousands of partners with no meaningful marketing support. (Further information is available in our article – [How Partner Profiling Can Increase Your Channel Sales](#).)

One resource-efficient way to resolve this issue is to provide outsourced partner marketing concierge services which partners can acquire on a temporary basis – say for a quarter or two – for an affordable, modest sum that could vary anywhere from a few hundred to a few thousand dollars and is funded by vendor MDF. When a vendor aligns their market development funds (MDF) process behind such a concierge effort, they can create a menu-based marketing catalog, incorporating pre-approved campaigns and activities which partners can select and execute independently, requiring very little support from the vendor's sales or marketing organization.

Using an outsourced partner marketing concierge service, a channel partner will be able to run integrated campaigns using various types of marketing tactics, e.g., search marketing, social marketing or social content syndication, web content, event marketing and email marketing. If needed, a partner marketing concierge provider can also enhance the program by providing telemarketing or tele-prospecting services, setting up appointments with qualified leads that partner sales teams can engage with and close.

This outsourced partner marketing concierge structure is gaining rapid popularity in small and mid sized IT vendors, following the lead of larger IT vendors who have already deployed this structure across all geographies. ZINFI's Partner Marketing Concierge services can enable a small and mid-size IT vendor to rapidly deploy one or more campaigns globally and fund them with market development funds.

“Most channel partners don't receive enough market development funds (MDF) at the right time to hire dedicated resources for a specific campaign or program. While some large distributors and a few, very large channel partners may receive funding for certain marketing resources on an annual contract; this is more of an exception than the rule”



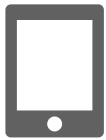
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Definition of Unified Channel Management (UCM)

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.



Identify and Access Management (IAM)

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



Alerts & Notification Management

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



Enterprise Change Management

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



FluidCMS™ Content Management

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



Business Intelligence Reports

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



FlexiFlow™ Workflow Management

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



Centralized Interconnection (CENTRi™) Management

The Centralized Interconnection (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.



Partners Profile Management

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



Users & Group Management

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

Expanded Modules Overview



Documents Library Management

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



Partner Locator Management

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



Co-Branded Assets Management

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



Partner Support Management

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



Products Details Management

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



Partner Survey Management

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



Communicate To Partners Management

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



Exchange Management

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



Community & Discussions Management

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



Projects & Tasks Management

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

Affiliate Marketing Management (AMM)

Modules Overview



Marketplace Management

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



Referral Management

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



Promotion Management

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



Payment Management

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

Partner Relationship Management (PRM)

Modules Overview



Partner Onboarding Management

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



Partner Leads Management

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



Partner Contracts Management

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



Deals Registration Management

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



Partner Business Plans Management

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



Configure Price Quote (CPQ) Management

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



Partner Learning Management

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



Channel Data Management (CDM)

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

Partner Marketing Management (PMM)

Modules Overview



Search Marketing Management

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



Microsite & Landing Page Management

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



Social Syndication Management

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



Event Marketing Management

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



Direct Mail Marketing Management

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



Web Syndication Management

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



Email Marketing Management

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



Multi-Touch Campaign Management

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

Partner Incentives Management (PIM)

Modules Overview



Commissions Management

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



Sales Rewards Management

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



Market Development Funds (MDF) Management

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



Rebates Management

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



About ZINFI

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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