

# Partner Business Planning

The Partner Business Planning module of ZINFI's partner relationship management (PRM) platform enables your organization to automate the development of business plans, streamlining interactions between internal and external channel partner stakeholders to ensure efficient plan execution and compliance.

# Partner Business Planning

The Partner Business Planning module allows your organization to automate business planning activities within a multi-level channel ecosystem with an online form and approval flow process. You can also set up system alerts to notify channel partners when new business plan templates become available.

With our Partner Business Planning functionality, channel partners can easily incorporate marketing plan details, then sign the business plan and push it for your approval through an expedient, automated multi-level approval process. The reporting features of this module give you greater insight into the planned marketing activities initiated by your channel partners.

Business Plan				
Decutive Summary Business Plan Fo	iles Seistegy & Cersification receising Training			
Plan Norm**	Q218 Mobility Sales Strategy Business	Plan Revew Oate	01012018	
Partner Account	Widget Partner	Pan #	8P00100	
Created By	gisbalcmm.zinfi@gmail.com	Plan Status	Accept	
Year	2018	Plan Type		
Quarter	G2	Delivery Status	Accepted	
Plan Start Date	07/01/2018	Plan Canoniation Reason	NA	
Plan End Date	09/00/2018	Partner Dusinos Manager	See	Cear
Last Modified	08/04/2017 0:00:20 AM	Channel Marketingt Manager		t Cear
Assign Ta*	zint op@gmail.com	Seet: Cear Plan Owner	Rhonda Noel	
Mission Statement if you have a Mission Sta	Annant include 8 here			

# **Key Features**

- ✓ Business Plan Setup & Upload
- ✓ Business Plan Expiration Management
- ✓ Business Plan Access Control
- Partner Notifications
- ✓ Business Plan Reporting

# *zinfi*

# Certification & Training Management

The Partner Business Planning module allows your organization to designate channel partner specializations using the Certification & Training zone, where you can also instantly determine resource availability for any assistance a channel partner might require.

Channel partners can designate individuals for specific training programs organized by your organization to ensure teams get trained and certified on the appropriate products before marketing and sales activities begin. The Certification & Training zone gives you complete visibility into the resources needed for your product marketing and sales activities.

NGET Hor	e Profile Training <u>Planning</u> Marketing Sales	icentives Reports	0 ::
Certificatio	n Training		
Executive Sum	Sales Strategy & Certification many Dusiness Plan Forecasting Training		
P117			
Special sations		Opt 1	*
		Scheduled Date	Completed?
Product Trainin	5	522016	Yes
Marketing Fors	el Ouerview	452018	In Progress +
Partner Porta 0	Sumbour	43/2018	is Progress •
Sales/Engineers	ng Team introductions	732998	No •
Sales Training		Scheduled Date	Completed?
Name	Canita Backburn	5229/8	In Program
Name	Vance Berger	562018	In Progress •
Name	Synday Abuns	81/2018	No. •
Technical/SE Tr	aining Specializations	Scheduled Date	Completed?
Name	Addition Engineer	5152218	In Progress +

# **Key Features**

- ✓ Partner Specialization Management
- ✓ Partner Rep Training Nomination Management
- ✓ Training Status Management

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