Must-Haves For Your Partner Portal

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Most Partner Portals Today Are a Reflection of How the World Used to Be Versus How They Need to Be

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

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

1. Localized Experience

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

2. Single-Sign-On *(SSO)*

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

3. Unified Platform

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

4. Mobile Responsive

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

5. Search Optimized

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

6. Role Based

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

7. Dynamic Content

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

8. Portal Training

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

9. Integrated Analytics

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

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

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