3 Ways to Use Your CRM Platform for **Partner Relationship Management**

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Configuring your existing CRM platform to support your **PRM** efforts

Organizations selling via networks of channel partners (resellers, VARs, distributors, wholesales, agents, or other third party arrangement need to have a systematic approach towards **partner relationship management (PRM)** if they are to achieve long term success. This starts with the three primary stages of partner recruitment, partner enablement and partner management, all of which require a set of internal processes, structure and tools.

Today, almost all organizations selling through the channel have deployed Customer Relationship Management (CRM) automation platforms for both direct and indirect sales teams. If you are in an organization that hasn't yet deployed a purpose-built PRM software platform, and do not have a budget to do so in the near term, then you may want to consider configuring your existing CRM platform to support your PRM efforts in the following way.

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1. Partner Recruitment
   The first step in deploying **PRM** is to employ a step-by-step approach to partner recruitment and onboarding. Partner recruitment activities typically entail an outbound reach to or inbound engagement with potential new partners who are willing to carry your solutions and resell. The two most important elements of this process are Partner Profiling (please refer to our article How Partner Profiling Can Increase Your Channel Sales) and Partner Onboarding (our article on 7 Critical Factors for Partner Recruitment). If you are using a CRM application to manage lead flow for your end-user marketing, then you can create a separate lead type called 'Prospective Partners' and assign all new partner leads into that category. This is a roundabout way of overcoming gaps in partner marketing automation, but if you don't have a **partner relationship management** platform it helps you to get by for a while until budget or other issues are resolved.
   Also, in addition to inbound lead management for the Prospective Partner category, you can require your inside sales team or channel account managers to update the status of the partner as go through a 30-60-90 day onboarding process and you ramp the partner to their first revenue.
   Needless to say a purpose-built **PRM** platform would automate the process, making this process significantly easier, but if your organization is not ready to commit, you can certainly demonstrate the value of automating **PRM** workflow by reconfiguring your CRM platform.

2. Partner Enablement
   The two most important areas of partner enablement for **partner relationship management** are – partner training and demand generation. Both training and demand generation automation are critical to make sure your partner organizations are capable of generating leads and closing them. This applies to any organization that is selling through the channel using your channel partners as your indirect sales force.

   Regarding automating partner training, if your organization has a learning management system (LMS) for the internal sales team, you can create a separate group called 'partners' that you can leverage for partner training. You may have to procure additional licenses per user; however, if you do not have an LMS platform then you will have to figure out if you can use the documents module, which most CRMs have, that can be used for uploading videos, documents or other assets, to train your partners on your products and services.
   Again, a purpose-built **partner relationship management** platform will give you the desired ease

of use for rapid deployment of an end-to-end partner training process, but you can work around this using the point tools available within your organization.

When it comes to demand generation activities, it is essential to decide what lead generation campaigns you want to make available to which countries and partner types. Once you have determined what's going to work for you, then again you can use your CRM application. If you have a documents module you should be able to upload campaign assets (email templates, landing pages, etc.) to set up campaigns-in-a-box for partners to use.

3. Partner Management
   This entails automating four major activities – deal registration, rebates & rewards and market development funds. This is where it gets a bit sticky if you are trying to use a CRM for automating your **partner relationship management** workflow. The primary issues arises from reporting hierarchy, i.e. mapping the partners by territory to territory managers and then to their managers, and aligning them to a dynamic alert and notification management system. Most organizations waste an enormous amount of time in managing partner activities via email, spreadsheets and documents. While you can certainly configure your current CRM to automate some of these steps, a purpose-built **partner relationship management** software platform will always accomplish the task more easily.

   So, while you can use your current CRM for deal registration, partner rewards and rebates and finally market development funds management, the time saving and management insight that you would get from a purpose-built **partner relationship management** platform may demonstrate to your management why the investment in a full PRM system is worth while.

Last but not the least, one of the most important aspects of **partner relationship management** software is the ability to run effective sales and marketing metrics to see what is working and what is not. Your current CRM system can certainly give you a lot of good insights. While a CRM cannot fully compete with a purpose-built **PRM** platform (please see our article on Why CRMs Don't' Work As **Partner Relationship Management**), it would at least allow you to automate some steps and demonstrate value of automation to your executive team, allowing you to invest to reduce cost and increase profitable revenue.

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