



How to Select and Deploy a **Partner Portal Solution**



Take the right steps in the right sequence, you are bound to get a handsome return from your investments in a partner portal solution

If you have been tasked with finding a **partner portal solution**, the best approach is to follow a formal process in which you clearly define where you are as a channel organization and where you want to end up over a given period of time. Then you will need to investigate what is available in the marketplace.

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As a leader in **Unified Channel Management** (UCM) solutions, we at ZINFI get to work with all kinds and sizes of companies, ranging from companies with fewer than 100 employees to enterprises with 100,000 employees or more. We have been providing channel management solutions—including partner portal solutions—for more than a decade now. The framework for selecting a solution I am about to suggest is based on our observations over the years, and it is applicable across the board, whether your company is just emerging or is an established global enterprise, and regardless of the vertical you operate within.

The first step in figuring out what you need in a partner portal solution is to ask, “What are the three to five most important ways to drive our channel sales?” This is important, because aligning your partner portal solution with your organization’s core business goals is the best way to ensure your partner portal reaches its full potential.

The second step involves establishing detailed objectives around these core goals. Let’s say, for example, that your goal is to recruit more partners. In that case, one of the key capabilities you need to look for in your partner portal solution is partner **onboarding** automation. On the other hand, if you are trying to minimize or eliminate over-distribution of your products in the channel, then you will want a partner portal solution that automates your management of programs like partner certification, **deal registration**, planning and similar functions.

The third step in selecting a partner portal solution is to identify some top priorities to focus on as you begin the process of automating your channel marketing workflow with a brand-new partner portal solution. For instance, if you do not already have a clearly defined deal registration policy and process in place, no automation tool will be able to help you with that. You’ll also likely need to do some work getting members of your organization and your partner base to understand the benefits of automating and to buy in to that process. You may also need to establish a formal **lead management** policy that your partners can readily understand and accept,

and then you can use your partner portal solutions to automate the steps involved. The point here is to anticipate basic requirements and formally plan for them before jumping in.

The fourth step is to establish a cross-functional team that will own and drive the build-out of your new partner portal solution. We have seen this principle play out multiple times over the years: Without the right executive sponsorship and alignment with core business goals, it is very hard to drive change in an organization. Also, a partner portal solution will need to be able to adapt to change as your channel objectives change, so it should be able to support various and evolving initiatives. You need to create a team dedicated to managing these challenges.

The fifth and final step is to carefully evaluate technology vendors (like **ZINFI**) in the marketplace and make sure that you end up buying and deploying a partner portal solution that is future-proof. The channel is a living organism and it evolves over a period of time. Your partner portal solution should be flexible enough in its architecture and comprehensive enough in its vision to evolve as your channel requirements change over time.

When you follow a deliberate process in selecting and deploying the right partner portal solution, you really can super-charge your channel. In today’s age of artificial intelligence and digitization of business processes, it is critical to have right technology to enable success and stay competitive. However, what I’ve tried to show here is that success in automation is a function of careful expectation setting, planning and execution management. There is good technology currently available, and when you take the right steps in the right sequence, you are bound to get a handsome return from your investments in a partner portal solution and the associated channel investments. We see this all the time across companies of all types and sizes.

Are you ready to take the first step? Please feel free to reach out and set up a demo with us. We are, after all, the leader in Unified Channel Management solutions.



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