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What Is a **Channel Management Process**

Here are five classic channel management process steps that tend to have multiple sub-steps. Let's discuss...

We have already discussed the definition of channel management in an earlier article, so today I won't go into the details of what channel management is or what it should be. Instead, I would like to focus on the **channel management process** steps that you need to carry out to execute a successful and profitable channel management program in your organization.

> *"In order to build a high-performing channel, a vendor organization really needs to deploy a Unified Channel Management (UCM) framework that allows you to systematically build and integrate state-of-the-art channel programs and policies and deploy them via the UCM platform."*

As a brief reminder, let me just say that channel management is a set of activities—including resource allocation—whereby an organization defines and manages marketing and sales processes, people, policies and platforms to deliver goods and services indirectly through partner organizations. The goal of these activities is to maximize revenue at the lowest possible cost. Such activities are referred to collectively as "channel management."

Now, channel management processes classically refer to five core steps:

1. **Partner recruitment –** This channel management process step focuses primarily on targeting a set of businesses as prospective channel partners for an organization that wishes to expand its go-to-market presence. In order to successfully carry out this channel management process step, the organization needs to put together a **profile** of their partner base that identifies the desired characteristics of prospective partners, and then recruit the target companies with various "market to" activities that promote the benefits of partnership and informs them about relevant products and programs.

2. **Partner onboarding –** This channel management process step is responsible for getting partners signed up and oriented in a vendor's partner program. In this step, the partner organization needs to be provided with all the information that enables them to sell the vendor's products and services. This step typically includes the signing of contracts relevant to the partner's competencies or verticals. It also entails business planning steps that cover marketing, sales, technical and support activities, and specifies financial targets and commitments. **Onboarding** also includes partner training so that partners are equipped to market and sell your solutions. Automated channel management training tools or a learning management system can be a big help here.

3. **Partner engagement –** This channel management process step tends to focus on running marketing, sales and technical programs to keep current partners engaged with your organization's objectives and initiatives. A primary purpose of this process step is to ensure that partners who are already onboarded get retrained and are fully engaged each time you launch new products and services. Keeping partners engaged over the long term should be a key goal of your channel management strategy.

4. **Partner enablement –** This step focuses primarily on enabling the channel partner with appropriate **training**, as well as marketing and sales programs. These marketing and sales programs tend to include turnkey marketing campaigns as well as marketing and sales assets. Some of these campaigns and assets can be provided via a partner relationship management program as well as a variety of partner marketing management tools.

5. **Partner management –** This last channel management process step is about driving sales productivity and growth by incentivizing partner organizations with offerings like **market development funds** (MDFs), co-op funds for co-marketing and sales activities, rebates, and sales rewards for individual sales reps. Partner **incentives management** should be a key part of any vendor organization's channel management strategy.

As you can no doubt see, these five-classic channel management process steps tend to have multiple sub-steps, and we will discuss those in other articles. However, in order to build a high-performing channel, a vendor organization really needs to deploy a **Unified Channel Management** (UCM) framework that allows you to systematically build and integrate state-of-the-art channel programs and policies and deploy them via the UCM platform.

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www.zinfi.com

Contact Us

AMERICAS

sales.noram@zinfitech.com
6200 Stoneridge Mall Road, Suite 300
Pleasanton, CA 94588
United States of America

EUROPE, MIDDLE EAST AND AFRICA

sales.emea@zinfitech.com
Davidson House
Forbury Square, Reading
RG1 3EU, United Kingdom

ASIA PACIFIC

sales.apj@zinfitech.com
3 Temasek Avenue
#21-00 Centennial Tower
Singapore 039190

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