



# Managing Partners Remotely Using Partner Relationship Management Software



## In this article we will explore how we can manage the partner base remotely and globally using state-of-the-art partner relationship management tools.

Over the past 40 years the world has been speeding up the pace of digital adoption. While it may seem like Amazon was founded yesterday, it was actually founded in 1994—about 25 years ago. Microsoft was founded a couple of decades earlier than Amazon, in 1975, and Oracle was founded in 1977. About a decade earlier than Microsoft, Intel was founded in 1968. I think you get the point: The advent of digital goes back about 30 to 40 years—roughly half the span of an average human life—but the pace of change keeps getting faster, most recently with the explosion of cloud-based applications and solutions (hardware and software working together). This is also true of technology that addresses partner relationship management (PRM).

*Performance management in a remote and distributed world not only requires a PRM-like digital platform, but it also requires the entire channel workflow to be automated end-to-end.*



As we adopt more and more digital tools in our lives—at work, home and school, and while travelling away from home—silently but surely we are rebuilding how we work, live, learn and enjoy our leisure. Partner relationship management (PRM) software is no different. Partner management has existed since commerce existed in pre-historic times, but over the past few decades, with the adoption of digital tools and digitization of commerce, more and more companies have focused on automating their channel management and partner relationship management activities. In this article we will explore how we can manage the partner base remotely and globally using state-of-the-art **partner relationship management** tools.

Here are the core activities we need to engage in to build and manage a channel remotely:

- **Partner Profiling** – Once an organization figures out who to recruit, the goal is to target, engage and educate prospective partners for recruitment. Gone are the days of hanging around in trade shows and randomly throwing out business cards hoping partners will sign up, or aimlessly running banner ads on channel magazines. Today, the tools are much more precise and they are all digital, even though physical trade shows, recruitment roadshows and similar events can certainly augment the digital presence on the ground.

To run an effective partner recruitment program, an organization needs to have profiles of the kinds of partners that they want to recruit. Target profiles can be created by researching existing partners' firmographic profiles and/or establishing capabilities the organization needs a potential partner organization to have—characteristics like certifications, regional coverage, go-to-market sales models and so on. Once this target profile has been created—a process we call **partner profiling**—then the recruitment journey can begin.

- **Partner Recruitment** – With the specific target in mind, an organization now will have to target prospective partner audiences via various digital

tools, such as social marketing tools (LinkedIn, Facebook, SlideShare, Twitter, etc.), online advertising of various kinds and outbound newsletter placement tied to subscription lists. Outbound emailing is becoming more difficult because of emerging privacy regulations like GDPR and CCPA, but opt-in lists for digital publications are still good vehicles for extending reach to a potential target audience. Once a prospective partner has expressed interest into a company's partner program, then engaging with those partners with compelling digital content via a partner relationship management platform is critical. This is where a partner portal comes in really handy. Any state-of-the-art PRM platform will provide a full-featured partner portal where users can create a zone for prospective partners to learn and educate themselves on the company's offerings wherever they are working from.

If a prospective partner is interested, they may apply and go through a simple or a comprehensive review process to be registered as an authorized partner to sell the organization's products. In case of captive distribution, this could be a franchise model where a partner has to pay to play, but in other cases—e.g., agents, or resellers and distributors—they may qualify to join for free, based on certain selection criteria. This is the next key step in partner relationship management—figuring out who you want and how to recruit them—and all of these activities, or certainly most of them, can happen remotely via a state-of-the-art PRM tool.

- **Partner Onboarding** – The next most important step is onboarding a partner digitally. Gone are the days where you would send a box with a whole bunch of welcome documents and trinkets to onboard a new partner into a program. You can certainly do today that as a gesture, but it doesn't work any more on its own. A partner who has recently signed up needs to be onboarded via dedicated programs. Each of these programs may have tracks, such as the signing of the agreement, going through basic training, conducting **business planning** and so on.

Each of these **onboarding** steps can be fully digitized. For instance, a partner can receive an email stating that their preliminary application has been approved, and now they have to log in to a portal to sign an agreement. This agreement can also be fully digital. If an exception needs to be made, documents can be signed offline and uploaded into a partner account manually as well. After an agreement has been signed, the partner has to go through a set of online training courses. These courses can again be linked to various tracks—e.g., a marketing track, sales track, technical track or service track. This is how personalized content can be delivered remotely to partner employees in a focused way for onboarding. After training, business planning is conducted in collaboration with the partner's management team. This entire process can be digitized and achieved remotely via a partner relationship management platform, like ZINFI's Unified Channel Management (UCM) platform.

- **Partner Enablement** – Once a partner has been onboarded, based on their industry preferences or functional track or geographical coverage, they can be put in various groups or categories, and each of these groups can be offered group-specific customized content and programs for enablement. For example, marketing people can be given access to a set of marketing tools like email, social, web, event and so on, while sales people can be given access to tools, and content like sales training, sales data sheets, product literatures, price lists, etc.

For most companies selling through the channel, enablement also includes some level of lead distribution and management. It is critical to have a system that can automate—and remotely distribute and manage—leads to and from partners. In organizations where there are significant opportunity overlaps in the channel, a **deal registration** program can reduce channel conflict and increase partner satisfaction. An integrated approach to **lead management** and deal registration is always critical

to streamline the core focus for partner recruitment and onboarding, which is revenue generation. In addition to providing content and sharing marketing tactics, a good partner relationship management platform will allow a vendor to efficiently manage lead distribution and deal registration remotely and digitally for a distributed network of channel partners.

- **Partner Performance Management** – Finally, organizations selling through the channel need an efficient way to monitor and manage partner performance. In today's age, without a thoroughly digital tool like a partner relationship management platform, it is almost impossible to analyze sales data by territory, partner types, partner specialties, and other factors to understand what is working and what is not. This kind of analysis spans multiple regions, and functional organizations need to be involved. This is by definition a thoroughly distributed and intensely collaborative activity, and it requires a highly functional digital platform to pull everything together virtually so channel team members can easily connect, collaborate and analyze with channel partners and take decisive actions to drive sales performance to and through the channel.

Performance management in a remote and distributed world not only requires a PRM-like digital platform, but it also requires the entire channel workflow to be automated end-to-end. Without automating recruitment, onboarding, enablement and other core activities, and without the ability to integrate digitized sales data into a seamless dashboard, it is impossible for organizations to determine what is really going on in their partner network in real time. That's why a partner relationship management platform like ZINFI's Unified Channel Management platform is required to enable remote partner management—so organizations can digitize these activities and track them dynamically, but also to weave them together into an **analytical** “power tool,” allowing them to take their channel performance to a much higher level.



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