

Partner Enablement



Phase 3: Your Assignment

Develop an Internal Presentation, appropriate for Senior Management detailing the Enablement Program for Partners Recruited

- ✓ What on-boarding, education & marketing program support will be provided to the field CAMs and Partners?
- ✓ Where are you going to invest and why? **Don't forget to Brand it!**
- ✓ What metrics are you going to put in place to measure the success of each phase?
- ✓ What must the Partner commit to do, by when and for what commensurate benefits for each phase

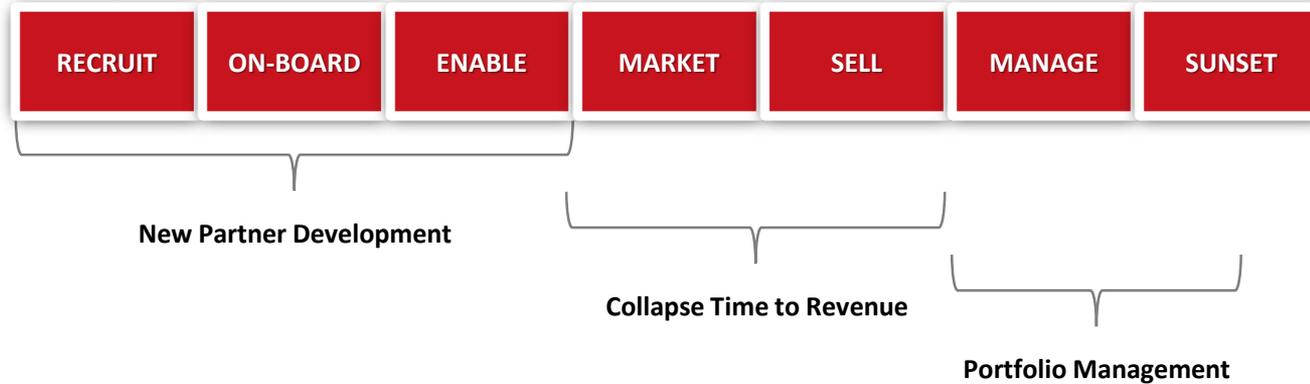


You are the Program Manager gaining buy-in to your program before you roll it out nationally. Gain the commitment to resources required to make this plan a reality, indicate where you have budgeted for the plan.

Your Peers will role-play your leadership team and will rate you fairly on your presentation.

Partner Enablement & Management

How You Manage Your Partners Depends On
WHO They Are ... As Well As “WHERE” They Are



Q:

- ✓ How much effort / investment?
- ✓ How much revenue expected?
- ✓ How stable is the relationship?
- ✓ Which specific actions / tactics apply?

Each discipline must be adapted to partner types (model / effectiveness / etc.) as well as relationship type & coverage model

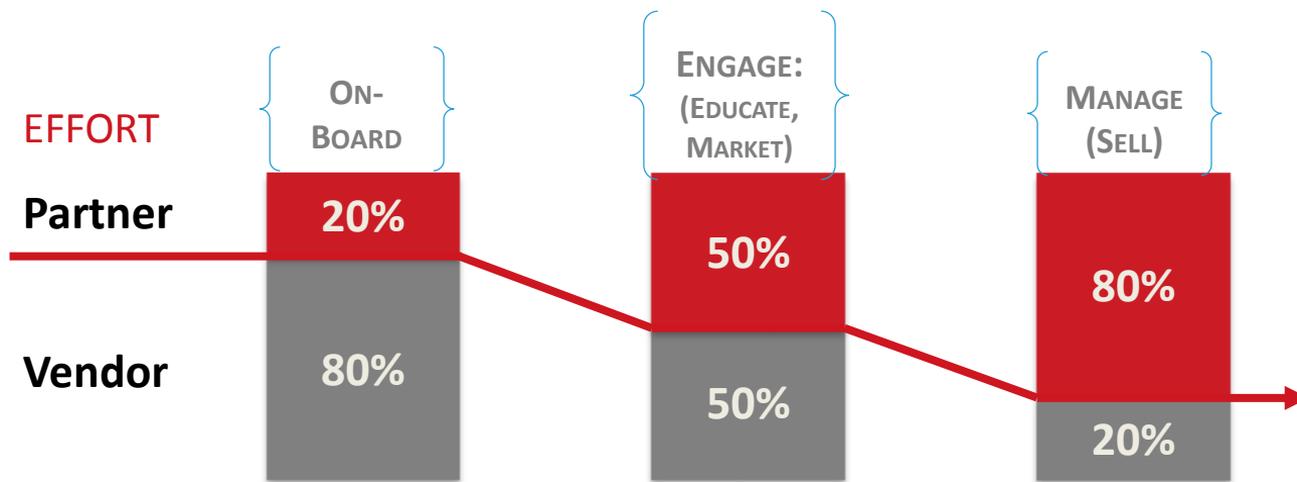
What Happens After They Say YES?

- **Just Because They Signed Up Doesn't Mean They're Ready to Go ... Or Likely to Produce Revenue Anytime Soon**
 - ✓ Vendors invest millions of dollars in recruiting ... much of it wasted on partners who never become productive
 - ✓ Once a partner is in the program, it's almost entirely up to the Channel Manager to cause that partner to become productive
 - ✓ The concept of “buyer's remorse” universally applies once the buzz of the recruiting process wears off
- **Time Is Critical**
 - ✓ The **FIRST 90 DAYS** of your relationship directly influence whether the partner will ever become productive
 - ✓ Even the most effective partners may require intensive support for **1 FULL YEAR**
 - ✓ When sales cycles are longer than 90 days, focus on and measure the activities that lead to revenue

Channel Rule: It May Take up to 18 Months to Fully Enable a New Partner

Evolution of Relationship Structure

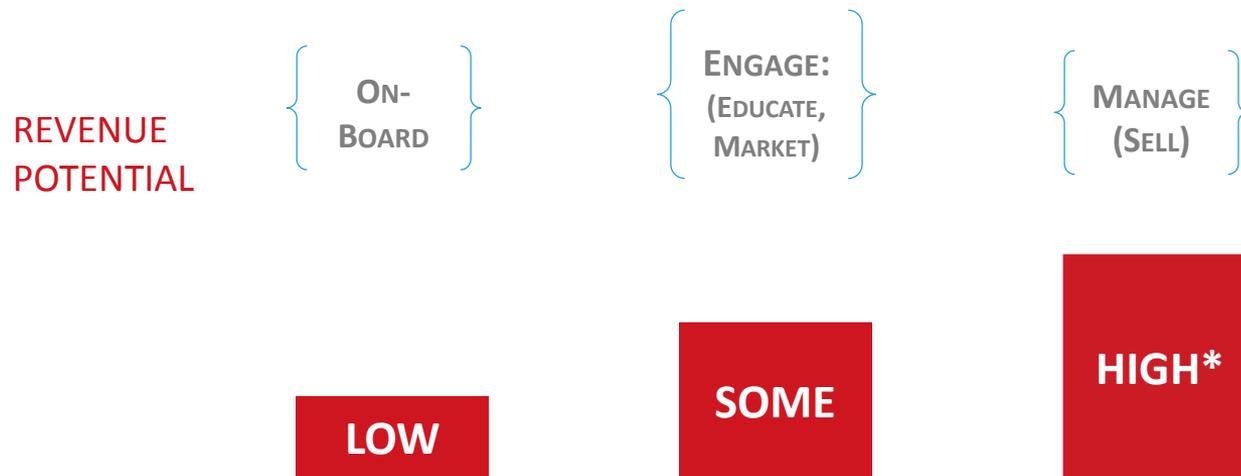
- ✓ If you don't effectively move each partner through each stage, the chances that they'll reach productivity are low



From Recruitment to Enablement

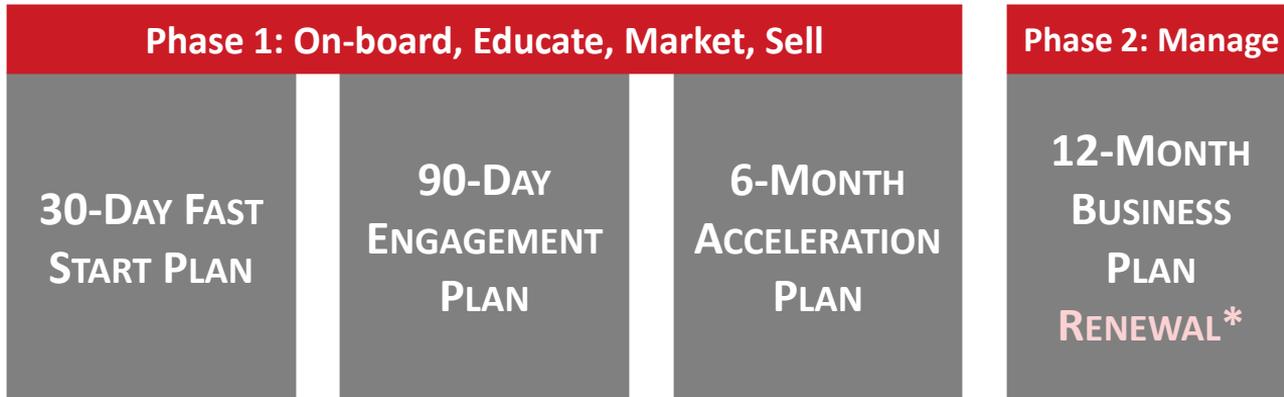
Evolution of Relationship Structure

- ✓ If you don't effectively move each partner through each stage, the chances that they'll ever reach productivity are virtually non-existent



Building A Partner On-Boarding & Enablement Plan

- Foundation for Performance and Accountability
- Simple, Specific, Repeatable Process
- **Brand It**, Teach It, Own It, Execute It Consistently
- Incorporate Business Plans for “Managed” Partners in either Phase 1 or Phase 2



*Business Plan should be initiated no later than 12 months after recruitment for “Managed” Partners

Keys To Effective Enablement Methodologies

Respect the Partner's Existing Commitments

- ✓ No matter when you “arrive” in the partner’s world, they’re already doing other things ... don’t expect them to drop it all just to start doing business with you
- ✓ Acknowledge limits and boundaries (i.e. current vendor commitments)

Align Your Goals with Their Goals ... But “Lead” for Growth

- ✓ Ask what they want to accomplish ... don’t tell them what you need
- ✓ Show the way to bigger goals than they initially set ... with tact and trust

Be Specific ... Especially About Money

- ✓ Establish goals that are attractive to you and realistic to the partner
- ✓ Define investments that will be required as well as profits to be earned

Establish Ownership ... Enforce Accountability

- ✓ Never leave a meeting without capturing the action items, identifying the owner, establishing a “due date”, and clearly stating dependencies
- ✓ Do what you say you’ll do ... no matter how big or how small

What Do You Do First?

After the Partner Says Yes and Joins the Program ...
What Specific Actions are Needed to Initiate Productivity?

AUTHORIZATION & ON-BOARDING

- ✓ Contracts
- ✓ Sales Contacts
- ✓ Technical Contacts
- ✓ Marketing Contacts
- ✓ Order Processing

INITIAL TRAINING & CERTIFICATION

- ✓ Product Sets
- ✓ Channel Program
- ✓ Sales Process
- ✓ Technical Functions
- ✓ Market Dynamics

SALES PLANNING & ACCOUNTABILITY

- ✓ Market Segment
- ✓ Customer Dynamics
- ✓ Sales Goals
- ✓ Action Plans
- ✓ Milestones

Basic Objectives For Enablement Methodology

Simulation Phase 3

30-Day Fast Start Plan

- ✓ Basic Connections, Contracts, Forms, etc.
- ✓ Logistics
- ✓ Introductions
- ✓ Sales Introductions
- ✓ Initial Technical Training Plan

90-Day Engagement Plan

- ✓ Technical Training Activities
- ✓ Sales Planning and Targeting
- ✓ Initial Sales Opportunities
- ✓ Systems Alignment
- ✓ Executive Alignment

6-Month Acceleration Plan

- ✓ Joint Sales Activities
- ✓ Customer Assessments
- ✓ Product Demonstrations
- ✓ Initial Customer Wins
- ✓ Product Delivery & Logistics

12-Month Business Plan

- ✓ Accelerating Sales Activity
- ✓ Technical Service Development
- ✓ Sales Forecasting
- ✓ Communication Processes
- ✓ Growth Strategies

Coverage Model Considerations



Enabling new partners is an intensive activity ... but it can be scaled and systemized for different tiers of partners

TIER 1 PARTNERS

Direct Managed Relationships = CAM Coverage

- ✓ *Customized business plans and resource investments*
- ✓ *Detailed ramp expectations and forecast-ability*

TIER 2 PARTNERS

Indirect Managed Relationships = ICAM Coverage

- ✓ *Semi-customized business plans and resource allocations*
- ✓ *Still detailed enablement calendars; but less forecast-able*

TIER 3 PARTNERS

Disti /Un-Managed Relationships = Portal Coverage

- ✓ *Standardized business planning templates adjusted for segments*
- ✓ *Standardized resource allocations and conditions*
- ✓ *Automated, Push-email based on-boarding plans and task lists*

Education: Biggest Inhibitors...Does the Partner Believe You Understand?

- Time and Money
- Cost and ROI
- Opportunity Costs:
 - ✓ Keeping the business running while participating in education
 - ✓ Pulling people out of the field
 - ✓ Project delays if we pull people off projects to train



Almost **80%** of respondents expect free (47%) or vendor funded (33%) support and education.

“Lack of executive support.”

“Lack of proximity (major metropolitan area) and we prefer in person training.”

“Our CEO will not invest in training.”

Enablement Table Stakes

➤ **Provide content & learning paths by role**

E.g. Sales, Developer, Implementer, Architect, Service Level Operations Manager, etc.

➤ **Ensure Learning Path Ease of access, ease of use and personalization**

- Learning paths should facilitate training plans and track progress via dashboards by individual
- Consider which content is available outside firewalls, e.g. YouTube
- Think hard before requiring expensive, in person training requiring travel and time out of territory
- Provide “test outs” and fast path education when a similar or competitive certification is held

➤ **More often, educate for solutions rather than products**

Private cloud solution versus server & storage

➤ **Facilitate access to Developers & Communities**

Both inside (authenticated) and Outside (YouTube, LinkedIn, Twitter) of your Partner Portal

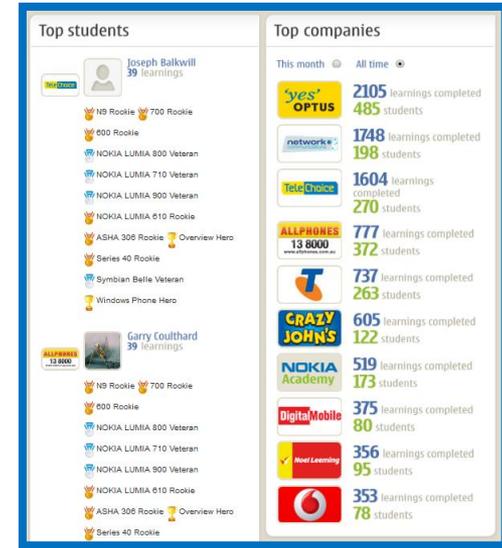
Enablement Best Practices

- ✓ Virtual technical labs with continued access after class
- ✓ Mobile device delivered content
- ✓ A trend towards Gamification with the emphasis on content, access, leaderboards rather than gaming
- ✓ Individual incentives to achieve required learning including, cash/debit cards, points programs for merchandise, access to developer or Vendor Partner forums, individual designations/badges/certification titles

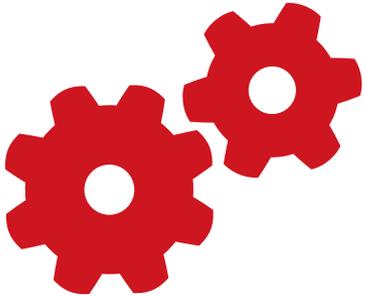
MSP education needs are emerging and may differ slightly

Sales education is considered best of breed when the curriculum provides revenue generating direction in the least amount of time, when needed

Best of breed technical training requires the use virtual labs where work can be saved for reference after class



Partners Declare Marketing a Significant Weakness



Marketing

- ✓ Assistance to supplement Partners' acknowledged poor marketing skills is highly valued
- ✓ Fewer than 35% of solution providers utilize vendor self service marketing assets.
- ✓ Some, looking for high touch support, opt for lesser known vendors who will allocate full marketing support.

“Ruckus isn’t necessarily best of breed, but I’m building a pipeline with them. Ruckus is trying to capture share from the big guys, they tailored demand creation to meet our needs.”

“Both Cisco and EMC have invested in Channel Partner Marketing Certification.”

Partners Rank the Value of Marketing Benefits available from You and Distribution

Partner Investments

1. Email/on-line mktg.
2. Social media platform
3. Lead mgmt. & nurturing

IT Vendors

1. Web content syndication
2. Email/on-line mktg.
3. Mktg. campaign mgmt.

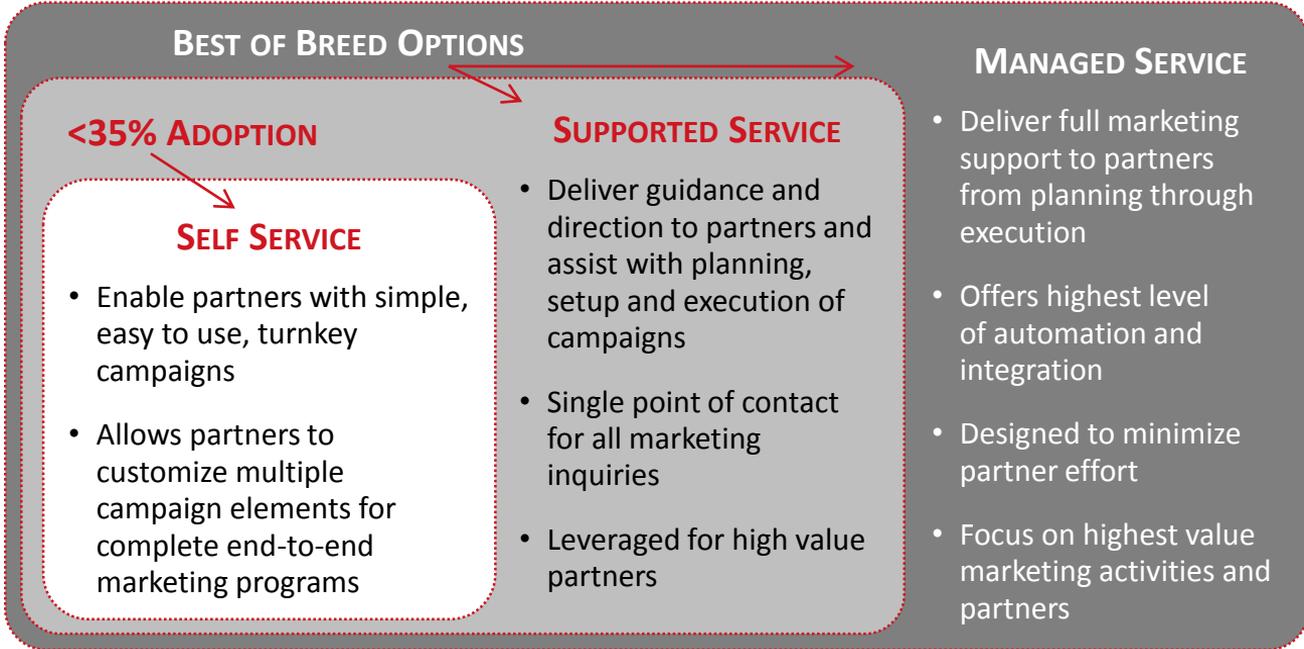
Distributors

1. Video production
2. Marketing campaign mgmt.
3. Web content syndication

Self Service Tools Demonstrate A Less Than 35% Adoption Rate. Vendor Support Is Needed To Supplement The Typical Partners' Capabilities.

The Question

Can high touch capabilities scale to the masses through a marketing automation investment driving greater participation?



Enablement Plan Development

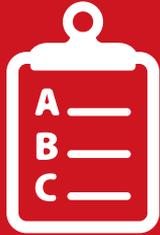
- 1 Determine The Desired / Realistic End Goal / Respecting what the Partner can actually do!!
- 2 Break The Goal Into Logical Phases
- 3 Establish Key Milestones & Metrics
- 4 Determine Detailed Tactics & Resources
- 5 Validate, Socialize & Gain Commitment from Partner
- 6 Implement & Mentor
- 7 Monitor, Measure, Adjust

Note: Everything isn't Best of Breed...Basic Blocking & Tackling with Follow up Moves the Needle!

Note: Each step in the process can be adapted for "managed" or "programmatic" implementation

Structured Commitment Typically Calls For a Jointly Built Plan

30-Day Fast Start Plan -- EXAMPLE			
BUSINESS GOALS	RESOURCES	OWNER	STATUS
Complete Application & Authorization	<ul style="list-style-type: none"> • Application Forms • Business Information • Approval Signatures 	Lead: Partner Support: Vendor	
Establish Workflow & Key Contact Info	<ul style="list-style-type: none"> • Vendor Channel Manager • Partner Sales Manager • Partner Order Entry Lead 	Lead: Vendor Support: Partner	
Conduct Business Alignment Session	<ul style="list-style-type: none"> • Vendor Channel Manager • Partner Executive Team (Mgr; Sales; Technical) 	Lead: Vendor Support: Partner	
Conduct Initial Staff Introduction & Kickoff	<ul style="list-style-type: none"> • Vendor Channel Manager • Vendor Solution Expert • Partner Staff (All) 	Lead: Vendor Support: Partner	
First Sales Oppt'y Mining Session	<ul style="list-style-type: none"> • Vendor Channel Manager • Partner Sales Team 	Lead: Vendor Support: Partner	



Team Workshop Phase 3

Enabling Your Partners

Reading the Navigator Handbook

Navigator (Simulation) Overview

✓ Pages 5 - 10

The Business Environment

✓ Pages 12 - 19

- ✓ The Product: "MacroSoft's CloudOne Appliance"
- ✓ Traditional Resell Offering: ASP \$50,000
- ✓ Managed Services Offering: ASP \$1,000 per mo./per appliance
- ✓ Target market: SMB, upper mid market, departmental usage in enterprise customers
- ✓ Competitive Landscape: limited to one major appliance vendor, but many larger HW & SW vendors claim capabilities via alliance or OEM relationships
- ✓ Single tier channel of highly productive HW & SW VARs with solution and managed services capabilities. Annual revenues of \$3M+ and growing Page 17

Phase 3: Enabling Your Partners

- ✓ Present your Enablement Program to your Company Management: Page 27



Team Workshop Phase 3

TEAM WORKSHOP PHASE 3

ENABLE YOUR PARTNERS

Assignment—This is the final assignment and will conclude the competition section of the Channel Masters kick-off. In this assignment, your team should complete the following activities:

- Review the presentation template contained on the flash drive
- Discuss the enablement plans you believe are necessary to make your partners successful
- Using the template provided (or feel free to use your imagination), build a 4 - 6 slide deck that clearly articulates the process for enabling your partners. Remember to focus not only on what the process is, but also make sure you articulate why it is of benefit to the partner.
- Select stockpots and practice your delivery (leave at least 15 minutes at the end of your working session to make sure you know what you are going to say). The goal of this presentation is to get your management to buy into your enablement plan for partner success.
 - The panel will grade each team and scores will be added to the scores from Phase 1 and 2

Time allocations:

- Working session: 1 hour 45 minutes
- Team Presentations: 10 minutes

Information for your assignment:

- The panel will consist of your peers and they will also be in role play mode.
- There will be a panelist from each team (and we expect them to be honest and fair) and they will all be playing the same role of Senior Management in your company.
- Use the information provided in the lecture material combined with the presentation you developed in Phase 2 to develop a compelling story on how your team is going to help partners be successful.

During your presentation, the solution provider panel will grade your team on criteria:

- **Reliability:** Belief in the promises being made and the results represented based on their understanding of the company culture and general understanding of the industry relative to indirect sales
- **Collaborate Time to Revenue:** On-boarding, education and marketing plan, processes and infrastructure either accelerates revenue or decreases investment costs resulting in a shorter time to achieve partner payback on this technology
- **Reasonable Milestones:** Acceptance that the milestones that track progress toward vendor and partner commitments and goals are reasonable within what the company and the partner can truly accomplish.
- **Mutual Business Benefit:** The plan represents a balanced and shared investment scenario between the vendor and partner as presented over the short and long term.

Final Deliverable: 4 - 6 slide PPT presentation saved on the flash drive and turned in before you leave the work session.

After this session, we will tally the final scores and present the winning team with their prize!

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Partner Enablement Plan Scoring Criteria

Believability

- Has the team been realistic in terms of an Enablement Program that will execute resulting in partners that will deliver the committed revenue? Might partners execute? Can we the vendor execute?

Collapses Time to Revenue

- On-boarding, education and marketing plan, processes and infrastructure either accelerates revenue or decreases investment costs resulting in a shorter time to achieve payback on this technology.

Reasonable Milestones

- Have I bought into the milestones that track progress toward vendor and partner commitments and goals?
- Are they reasonable within what we as a company and the partner could truly accomplish?

Mutual Business Benefit

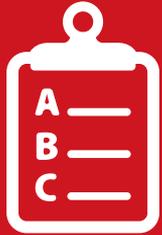
- The plan represents a balanced and shared investment scenario between the vendor and partner as presented over the short and long term.

Team Presentations: Enablement Plans

- ✓ You are presenting your Enablement Program to Company Executive Management
- ✓ Panel: Peers role-playing the individual executives
- ✓ We have confidence that judges will assess their teams as they do all others!!

Timeline:

- 10 minutes to pitch (GET MANAGEMENT BUY IN!!)
- 2 minutes questions
- 3 minutes to score



Enabling Your Partners Workshop Phase 3

Team XX

Today's Meeting Objective

- Goal of today's meeting is to advise management of what?
Or Engagement managements support for what? etc.
- Background...prior meetings or agreements or history to support today's meeting
- This meeting is a success if...exclaim what you are trying to achieve during this meeting, if these criteria or actions or agreements, etc. take place then the meeting has been a success...

Enablement Program Overview

- Could be a One Page Summary, One Page Visual or other Descriptive that provides a tops down view of the Program including Enablement Program Branding
- What are the Marketing, Education, Support, On-boarding and other program Components
 - Stated goals you hope/have been given to achieve
- Components by discipline: Marketing, Education, Support, On-boarding, etc.

Enablement Program Details or Examples

- Our Benefits
- Required of Partners and/or Partner Commitments
- Represented in Timelines and/or Phases as Appropriate
 - Who must/should participate
 - What might their participation require
 - Over what timeframe

Summary and/or Next Steps

- Closing thoughts for the meeting
- If criteria were met the meeting was a success; were the criteria set out at the beginning met?
- What is your next step if you are successful gaining internal support or an affirmative response to your update?
- Etc.

Enablement Plan Debrief

- ✓ In whose organization does this responsibility lie?
- ✓ Which Partners get TLC?
- ✓ Who is the Partner audience?
- ✓ Commodity product vs. Complex product Enablement plans?
- ✓ Templates, processes, branded?



Results Phase 3 Update

But Wait, There's More!

Enablement Topics We Will Not Have Time to Address

- Enablement Checklist Samples for Reference
- Sales Education Best Practices
- MSP Education and Support Trends

Sample: 30 Day Plan to Success



Check List – 30 Days

- Contracts
- Introductions: Channel Manager / Sales / Technical
- Order / Process Training
- Identify two Sales Reps and schedule training
- Identify two Sales Engineers / Implementation and schedule training
- Joint Meeting with Customer to schedule POC
- Identify Marketing Resources; contact interfaces
- MDF Plans
- Demo Kits on site; and schedule on-site engineer to install, implement and train

Sample: 90 Day Plan to Success



Check List – 90 Days

- Build business plan with CM
- Executive governance and alignment
- Complete training; both sales and technical
- Complete marketing plan with seed money
- Partner Ready On-Demand Marketing Tool Kits
- Complete Initial Customer POCs with WINS
- Partner identifies four potential customers
- Face-to-Face Co-Sell
- Schedule POC

Sample: 180 Day Plan to Sustainable Sales



Check List – 180 Days

- ❑ Published Customer References / Press Release
- ❑ Execute two “Vendor prime--Partner sub” implementation opportunities
- ❑ 6 month review
 - On-boarding & Enablement Plan review
 - 4 Closed Opportunities
 - Establish 90 Day Goals
 - Prepare to move to full Business Plan at 12 months
- ❑ Identify additional resources to support growth in implementation requirements

Sales Education: Content Matters

- ✓ Short and to the point
- ✓ Easy, clear and time efficient
- ✓ Practical and easy to understand
- ✓ It was available when I needed it
- ✓ Simple, easy, but accomplished a goal
- ✓ Effective and quick
- ✓ Well planned, executed and available in multiple formats
- ✓ Easy to use, flexible, reliable, credible



Easy
To
Use

-
- ✓ Includes information that leads to customer sales
 - ✓ It focused on the entire sales cycle
 - ✓ Drove quick sales
 - ✓ Enhanced my product knowledge to better close sales
 - ✓ Taught me how to diagnose a customer situation and build a win, win scenario



Leads
To
Sales

-
- ✓ Taught employees to respond to customer inquiries
 - ✓ Taught me new features on best of breed product
 - ✓ Allowed me to leave with a working demo



Product
Sales

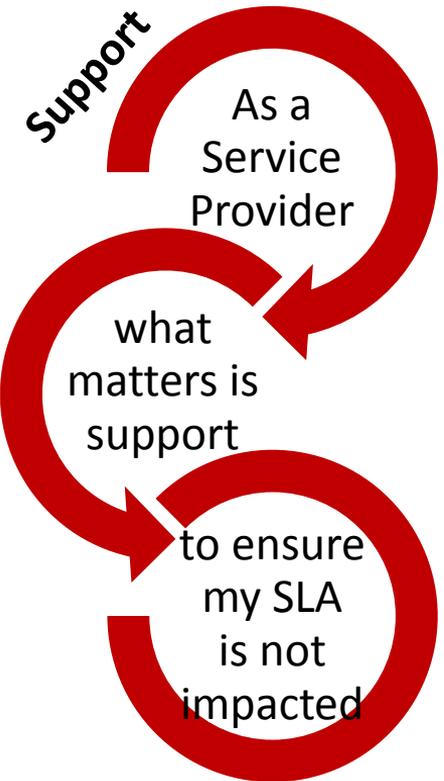
New Business Models Require New Considerations

THE MSP EDUCATION PROCESS:

“The right sales education is hard to find.”



Source: IPED Enablement and Marketing Study



“Regarding education, our needs are a bit different . We’re an MSP, web based, free or on-site for our team works . I don’t think I should have to pay to understand how to sell the product.”

“We would pay for post sales support then pass that on to the client in our service level contracts.”

Applying The Workshop Principles to Your Business Problems



Partner Program Development Topics We Don't Have Time to Address

- Affinity Alliances
- Two Tier Distribution
- The role of Service Providers in Two Tier Distribution
- Trends in Routes to Market usage
- Real Life Examples of Role based Programs, Converged Infrastructure, Cloud Programs, Services IP for Partners to Fuel Services Capabilities, Born in the Cloud Program
- Tiers and Levels: Three versus Four
- Graduation to higher tier levels
- Consolidation resulting in Broad Product Lines offering Cross Sell opportunities
- Ease of Use in Single sign-on, single brand with multiple tracks by business model or role
- Tiered vs Role based discounts
- Incentives
- Global considerations
- Feedback loops: CAM, Advisory Councils, Road Shows, Roundtables
- Program transformation history: Revenue, Points, Specialization/Certification, Role
- PRM
- Forecasting and access to POS through Distribution

Recruiting Backdrop

- Year round recruiting? or Only when declared?
- Who's responsible for recruiting?
- Who Identifies the Ideal Partner Profile?
- Recruiting few? or Many?
- Who's researching prospective recruits?
 - ✓ Targeted: stated profile represents many partners
 - ✓ Pinpoint: stated profile representative of a few, critical partners
 - ✓ All Who Apply: open to any profile

Enablement Topics We Will Not Have Time to Address

- Enablement Checklist Samples for Reference
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- MSP Education and Support Trends

For Folks Back Home...

What We Don't Do at Channel Masters

PRODUCT STRATEGY

REQUIRED INPUT

- ✓ Product ASP
- ✓ Target Markets
- ✓ Buying Behaviors
- ✓ Competition

CHANNEL STRATEGY

RTM

- ✓ Routes to Market Selection

- ✓ Partner Profile Development

- ✓ Value Proposition Development

Capacity

- ✓ Partner Productivity Assumptions

- ✓ Capacity Planning

PROGRAM DEVELOPMENT

Enable

- ✓ Sales & Technical Training

- ✓ Tools & IP Sharing

- ✓ Field Mentoring or teaming

Market

- ✓ Market to, through, with strategy

- ✓ Demand generation tools

- ✓ Co-marketing funds & rules

Sell

- ✓ Pre- and post-sale support

- ✓ Incentive structures

- ✓ Pricing and discount models

- ✓ Deal Registration



FIELD EXECUTION

Recruit

- ✓ Staffing model

- ✓ Onboarding activities

- ✓ Role of distribution

Manage

- ✓ Program metrics management

- ✓ Joint business planning

- ✓ Rules of engagement



Field Execution is where the Rubber Meets the Road, Beyond the On-boarding and Ramping, Business Planning comes into Play

From Enablement Methodology to the Field

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Channel Account Manager Training: The Business Plan

The Partner Business Plan

A jointly developed plan resulting in an understanding of your partner's revenue mix, investment with competitors, enablement plans, marketing plans and organization. Share of wallet and clear revenue commitments are two critical.

Revenue & Opportunity Planning

Optional: A jointly developed opportunity worksheet identifying the top opportunities for immediate engagement to close.

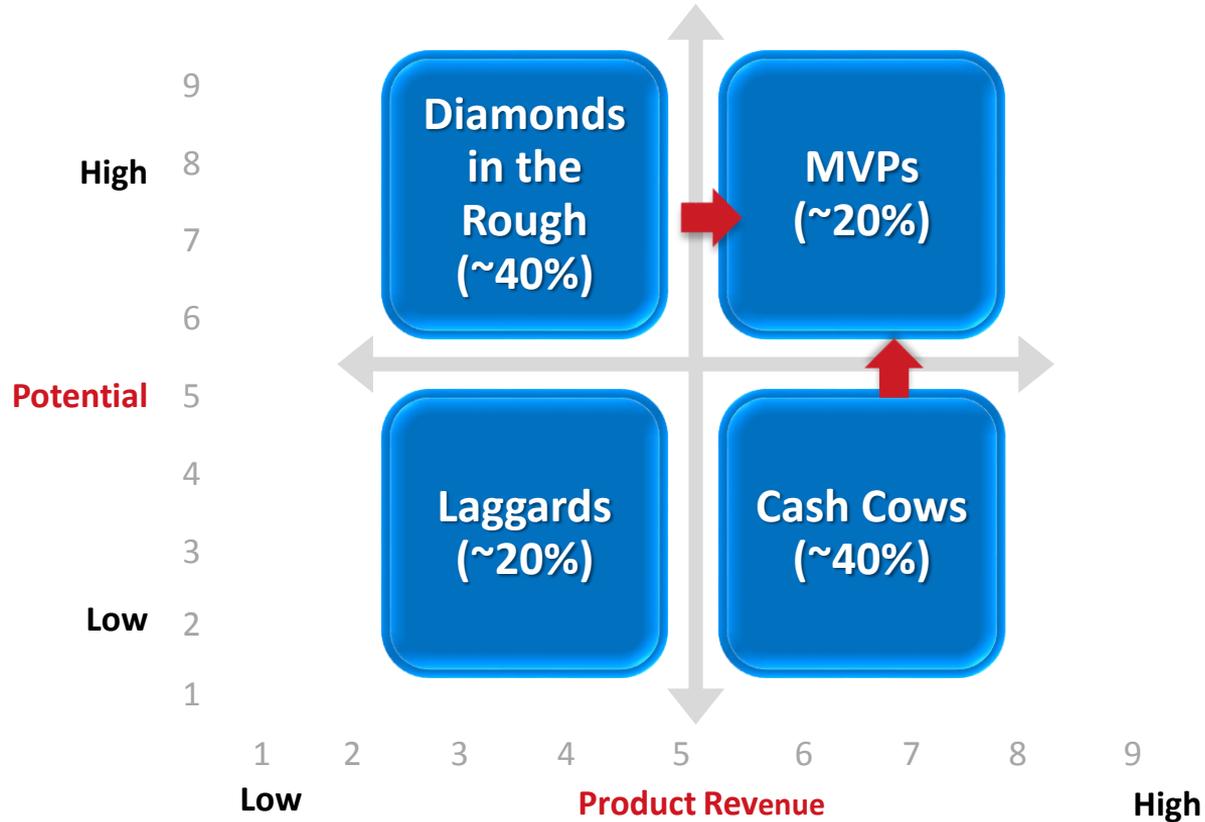
The Quarterly Business Review (QBR)

A structured, quarterly meeting to review progress against quarterly goals set out during the annual Business Plan.

The Call Plan

A structured Partner call preparation template (may be reduced to a checklist) to maximize the effectiveness of your partner call. Clearly prepare your stated goals, anticipate objections, prepare objection handling tactics.

Segmenting Partners Indicates Which to Prioritize for Business Plans



Capacity Planning Templates Help Identify How Many Partners are Required for Recruitment

INFO REQUIRED:

- ✓ Product ASP \$ _____
- ✓ # of Deals an Average Partner can Sell _____/year
- ✓ My annual Quota/Budget \$ _____
- ✓ Recruitment Failure Rate: _____%
*(Historically what % of partners recruited do not achieve **AT LEAST 80%** of the # of deals the Average Partner sells per year?)*

CALCULATIONS:

- ✓ Average Partner Productivity \$ _____
*(Equals Product ASP * # of Deals Average Partner Can Sell/year)*
- ✓ # of Partners Required _____
(Equals My Annual Quota \$ \ Average Partner Productivity \$; round up)
- ✓ # of Partners likely to Fail _____
*(Equals # of Partners Required * Recruitment Failure Rate %; round up)*
- ✓ Final # of Partners to Recruit _____
(Equals # of Partners Required + # of Partners Likely to Fail; round up)