

Best Practices for Better Engagement with the Product/Corporate Marketing Groups

Continuing Education for IPED Channel Masters

IPED Solutions for Channel Chiefs

Supporting the Strategic and Tactical Requirements to Drive Growth



ACCELERATING CHANNEL REVENUE GROWTH

Channel Research

- ✓ State of the Channel Market insights
- ✓ Competitive Benchmarking
- ✓ Partner Best Practices
- ✓ Partner Satisfaction Surveys
- ✓ Partner Profitability Analysis

Channel Strategy

- ✓ Program Design
- ✓ Routes-to-Market Design
- ✓ Channel Segmentation
- ✓ Partner Capacity Planning
- ✓ Channel Messaging

Recruiting & Engagement

- ✓ Partner Selection & Recruiting
- ✓ Partner Skills Assessment
- ✓ Business Transformation Training
- ✓ Partner Communications
- ✓ Channel Account Manager Training
- ✓ Partner Training

Program Development

- ✓ Channel Pricing & Promotions
- ✓ Training & Certification
- ✓ Incentives & Co-Op/MDF Management
- ✓ Cloud Programs

Development Communities

- ✓ Channel Leadership Forum
- ✓ Channel Masters Program
- ✓ Channel Workshops

Rauline Ochs



Over 25 years of experience building technology sales, marketing, distribution and operations teams.

- Prior to joining IPED, Rauline's most recent assignment was executive vice president, Safeco Insurance where she led corporate marketing, distribution and sales with responsibility for 8,500 independent agents.
- Previously, Rauline was Oracle's senior vice president, North American alliances and channels where she led the transition from primarily direct sales to a mix of segmented markets with indirect and direct sales, streamlined operations and improved partner profitability and satisfaction.
- Prior to Oracle, Rauline served as senior vice president of worldwide alliances for BEA Systems. She began her career with fifteen years at the IBM Corporation, selling hardware, software and services ultimately rising to vice president, channel sales & marketing for the Americas Software Group.
- A native Californian, Rauline holds a B.A. in economics from the University of California, Irvine and an MBA from the University of Southern California.



Mark Williams



Over 20 years of operational experience helping large and small companies generate greater revenue through direct and indirect channels.

- Unique experience of leading teams on the sales as well as strategic marketing side of organizations. Throughout his career, Mark has been responsible for developing channel strategies, defining channel programs as well as leading sales teams to drive revenue.
- Before his involvement with IPED, Mark was Vice President of Americas Sales at BakBone Software responsible for all revenue from the Americas.
- Prior to BakBone, Mark was Vice President of Global Field Operations and Vice President of Marketing at Vignette responsible for developing direct and indirect channel sales strategies, programs and operational management across all major geographies plus management of corporate, field and partner marketing.
- Mark also spent 11 years at IBM where he was the Director of Partner Marketing responsible for managing the global go- to-market strategies for all software brands which included developing channel readiness, partner recruitment, partner enablement, and channel marketing programs.
- Mark earned a BA in Computer Science from The University of Texas at Austin and spent his early career as a software developer and development project manager.

IPED® Consulting

 **BakBone**

 VIGNETTE™



Today's Conversation



- ▶ Connecting the Partner Journey with Buyers Journey



- ▶ Channel Ready Checklist



- ▶ Marketing Team Engagement

Sound familiar...or at least an area of improvement for your organization?

“The channel teams at [VENDOR] are really world class. The problem is that the rest of the organization has very little channel DNA”.

Today's Conversation



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- ▶ Marketing Team Engagement

A little background... Channel Team Perspective

Top Themes:

1. Lack efficient partner business propositions
2. Missing content targeting at specific partner types
3. Minimal comprehension of partner GTM strategies
4. Limited guidance from corporate on promoting awareness—to partners
5. Inconsistent planning and communications to partners

“We’ve made significant progress with the array of tools that are offered...forms a foundation that makes it easy for us to work with...”

“Easier to build something locally yourself than to try and grab pieces from marketing...”

“We don’t appear to have a dedicated team member within corporate thinking about channels...”

A little background... Corporate/Product Marketing Perspective

Top Themes:

1. General perception is that the organization understands channels
2. Content and assets developed are end-user specific first then we expect the channel team to tailor for their needs
3. We only require a basic knowledge of the various partner types
4. We do not have a clear understanding of partner needs
5. Minimal exposure to partner GTM strategies
6. There is an unclear feedback loop (what gets used and why)

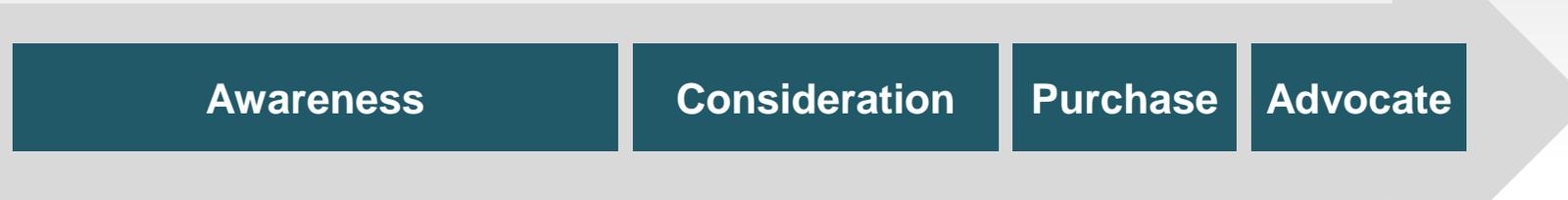
“We create a lot of content, but don’t have clear visibility into the partners use of it...”

“Most content is usable by the channel...”

“We don’t have a clear understanding of what is motivating partners to choose a vendor”

In order to fix this situation, Channel teams need to connect the dots...

The Customer's / Buyer's Journey



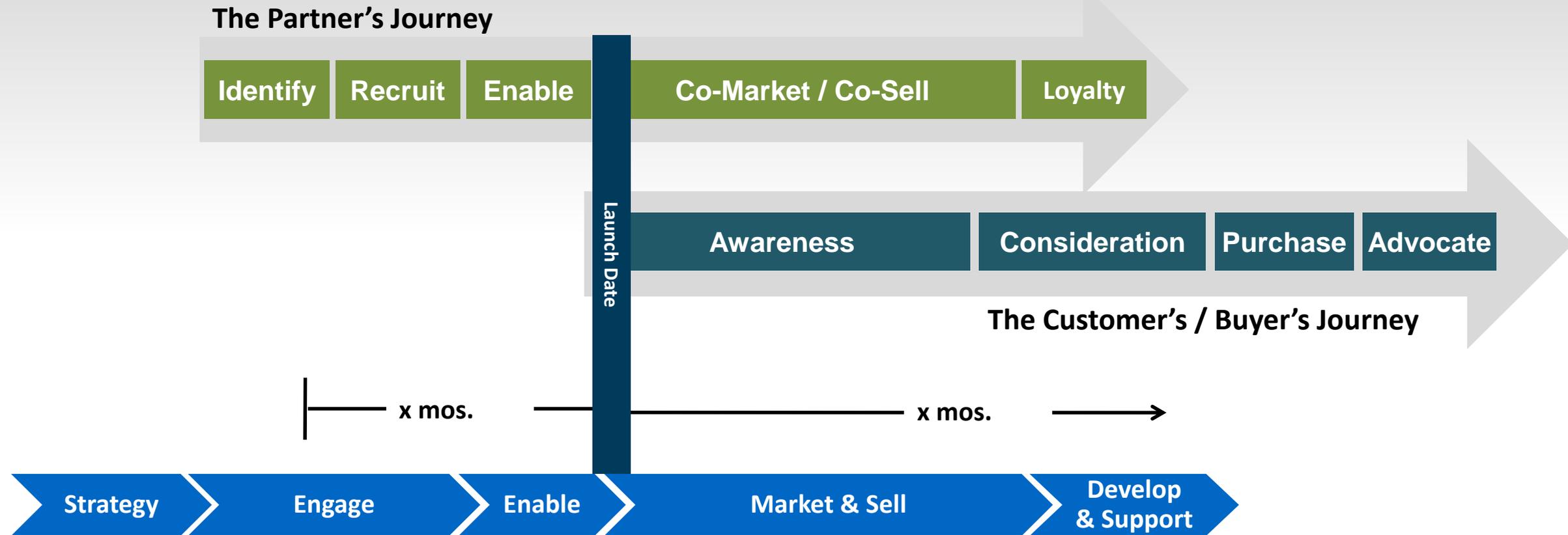
This is how the corporate marketing and product teams typically think...

The Partner's Journey



This is how the channel teams typically think...

A Successful Buyer's Journey...Begins with Partners



- Accelerate time to revenue
- Reduced partner ramp up time
- Accelerate buyers journey
- Improve customer experience
- Increase partner loyalty

Today's Conversation



- ▶ Connecting the Partner Journey with Buyers Journey



- ▶ **Channel Ready Checklist**



- ▶ Marketing Team Engagement

Why do you need a channel ready checklist?

- ✓ Channels should be treated like another “sales channel”
- ✓ Partners **MUST** be ready at time products/solutions reach the market
- ✓ Best in class channel organizations take the lead to drive channel first activities
- ✓ Many non-channel organizations do not necessarily know what needs to be done
- ✓ A well defined channel checklist is a must for repeatability



What is a channel ready checklist?



- ✓ Defines key activities required to take a product/solution to market via an indirect channel
- ✓ Commitment document between Channel and Non-channel teams for launch activities (especially product marketing and product management)
- ✓ Establishes timing requirements for channel activities and deliverables

Example of a channel ready checklist

Channel Readiness Activities	Timing (in advance of "launch")
Product/Strategic Marketing Readiness	
Target Customer Markets Identified with Customer value proposition	180
Key Messaging and Positioning documented	90
Key Routes to Market (RTM) Identified	90
Ideal Partner Profiles defined by RTM	90
Partner value proposition by RTM	90
Channel Partners selected for Beta program (If applicable)	Varies
Channel Partner references (if available)	30
Pricing and Packaging	
SKUs, customer pricing and channel discounts approved	60
Promotions available to channel partners	60
Partner ordering in place for direct partners and distribution	60
Corporate Marketing Readiness	
Marketing Demand Generation campaigns in place (w/ partner's role identified)	60
Logos, branding material, joint collateral material available	60
PR - Partners available for PR activities (briefed and available)	30
Product/Solution sales tools and collateral	
Sales collateral available to partners simultaneously with direct sales (datasheets, Whitepapers, Product/solution presentations, calculators, etc.)	60
Customer success stories	60
Reference Customers available for partners (where appropriate)	30
IT Readiness	
IT requirements finalized (if applicable)	120
Partner Enablement - Sales and Technical	
Technical Enablement and Training Schedule	90
Sales Enablement and Training Schedule	90
Sales enablement kits	30
Support Readiness	
Support ready for Partners as well as customers on a global basis	30
Professional Services Readiness	
Partners PSO teams trained	30
Best practices and packaged services available to partners	
Channel Team Readiness	
Channel/sales training presentation complete	30
Deliver Channel sales training	45
Deliver Channel technical training	45
Channel portals updated	30
Bulletins and Newsletters - prepared and delivered	30

Additional Cloud / SaaS based considerations



- Integrated customer account model
- Pricing and billing automation
- Partner of Record
- Renewal / Upsell plans
- Customer Success
- Lead Gen / Trials
- Cloud Marketplace integration

Adoption and commitment will change the game



- Used to establish clear expectations from all product teams
- Imbedded into the Product development / deliver process
- Executive commitment in place to delay product if not ready



- Education opportunity for non-channel teams
- Goals was to replace “tribal knowledge” as method for channel first activities
- Established connection between “buyer journey” and partner journey

Today's Conversation



- ▶ Connecting the Partner Journey with Buyers Journey



- ▶ Channel Ready Checklist



- ▶ **Marketing Team Engagement**

3 ways to improve the interaction

Customer vs. Partner Value Propositions

Help the corporate/product marketing team truly understand the difference between a customer value proposition and a partner value proposition

Why Do Partners Say NO to vendors?

- Overload ...
- Been There ... Done That
- All About You
- No Immediately Obvious Business Proposition
- Product Focus
- Communication “Style”
- Market Momentum



Results based on extensive research/surveys by The Channel Company/IPED

Customer Value Proposition vs. Partner Value Proposition

What's the
Difference



Partner Value Proposition

Customer Value Proposition

Audience

Partner: asses relevance, odds of success and ability to make money.

- Partner: during recruitment visualizes which Customers have the solution/product need
- Customer: assesses need when the Partner sells solution

Answers the Questions

- What is the solution?
- Customer Value Proposition?
- What is the customer demand and market size?
- What must I do to invest? What is my likely return? By when?
- Will I differentiate myself from my competitors?
- Do I trust you/your company?

- What is the solution? Capabilities?
- What business problem does it solve?
- What is the demand ?
- What are the use cases?
- Who are the references?

3 ways to improve the interaction

**Customer
vs. Partner
Value
Propositions**

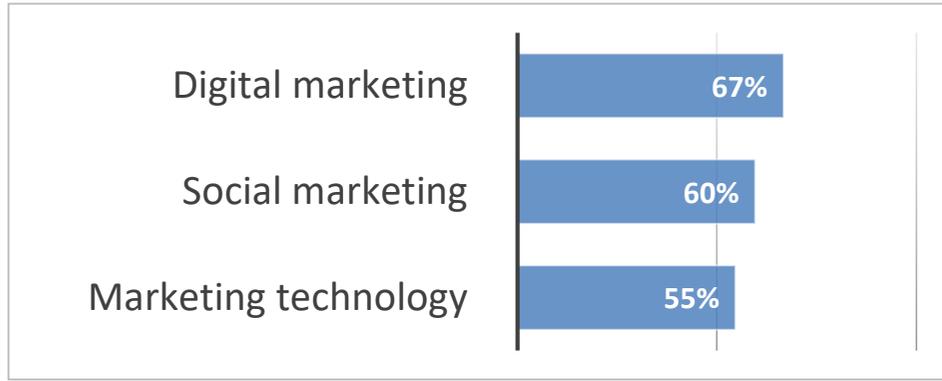
Help the corporate/product marketing team truly understand the difference between a customer value proposition and a partner value proposition

**Align Marketing
to
Partners**

Recognize and deliver marketing that matches how a partner goes to market

Partner capabilities and investments are constantly evolving

Partners are looking for new marketing skills



Marketers in partner companies often wear multiple hats

76%

% of Companies who had employees doing marketing activities but also other functions

Most important marketing activities overall



3 ways to improve the interaction

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Align Marketing to Partners

Recognize and deliver marketing that matches how a partner goes to market

Agreed Bill of Materials

Consider developing a jointly agreed Bill of Materials to support channel activities from marketing

EXAMPLE Channel Bill of Materials (BOM)

Highly mature channel model

	Awareness Support						Marketing Support						Sales Enablement						Sales Support											
	Internal Communications	Advertising	Press Releases	Analyst References	Online & Syndicated content	Keyword Search Terms	Reference Guidelines	Customer Targeting	Creative Brief	Graphic Elements	Digital Marketing Elements	Email	Tele Script	Training Presentation	FAQ	Sales Guide	Partnerships	Sales Play Card	Competitive Battle card	Discussion Guide	Whitepapers	Customer Sales Presentation	Case Studies	Technical Presentation	Solution Compatibility Guide	ROI/TCO Tool	Customer Brochure	Solution Brief	Demo	Technical Guide
<i>Direct</i>	O	O	R	R	R	R	R	R	O	R	O	R	O	R	R	R	O	R	R	R	O	R	R	R	R	O	O	R	R	O
<i>Telesales</i>	O		O	R	O	R	O	R	O	R	O	O	R	R	R	O	R	R	R	O	R	R	R	R	O	O	R	O	O	
<i>Distributor</i>	O	O	R	R	R	R	R	R	O	R	O	R	O	R	R	R	O	R	R	R	O	R	R	R	R	O	O	R	R	O
<i>Reseller</i>	O	O	O	R	O	R		R	O	R	O	O	O	R	R	R	O	R	R	R	O	R	R	R	R	O	O	R	O	O
<i>OEMs</i>	O	O	R	R	R	R	R	R	O	R	O	R	O	R	R	R	O	O	R	R	O	R	R	R	R	O	O	R	R	O
<i>Data Center Provider</i>	O	O	R	R	O	O	R	R	O	R	O	R	O	R	R	R	O	R	R	R	O	R	R	R	R	O	O	R	R	O
<i>Regional SIs</i>	O	O	O	R	O	R		R	O	R	O	O	O	R	R	R	O	O	R	R	O	R	R	R	R	O	O	R	O	O
<i>Global SIs</i>	O	O	O	R	O	R		R	O	R	O	O	O	R	R	R	O	O	R	R	O	R	R	R	R	O	O	R	O	O
<i>Managed Services Provider</i>	O	O	R	R	R	R	R	R	O	R	O	R	O	R	R	R	O	O	R	R	O	R	R	R	R	O	O	R	R	O

R Required
O Optional
 Requires customization

Notes:

- This is a sample from a well established channel organization.
- The key is to develop your **OWN** matrix based on partner needs and your ability to deliver.



Sample Bill of Materials Template available for download via your Channel Masters class portal

In Summary



- ▶ Connecting the Partner Journey with Buyers Journey

Integrating the journeys can fundamentally change the way an organization goes to market.



- ▶ Channel Ready Checklist

Experience has shown us that the product groups don't live and breathe the channel. They need a VERY specific checklist to ensure the products/solutions are ready for the channel.



- ▶ Marketing Team Engagement

Educating the marketing teams can be critical to the success for organizations driving to have a more channel first mentality.



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