Customer Success:

Partner Engagement Models

The Evolution of Driving Customer Value

THECHANNELCO.™ | IPED® Consulting

Contributors

Discussion

1

Let's Get On The Same Page

Definition of Customer Success and Business Drivers

2

Business Outcomes Requires Collaboration

Partner/Vendor Collaboration at Each Stage

3

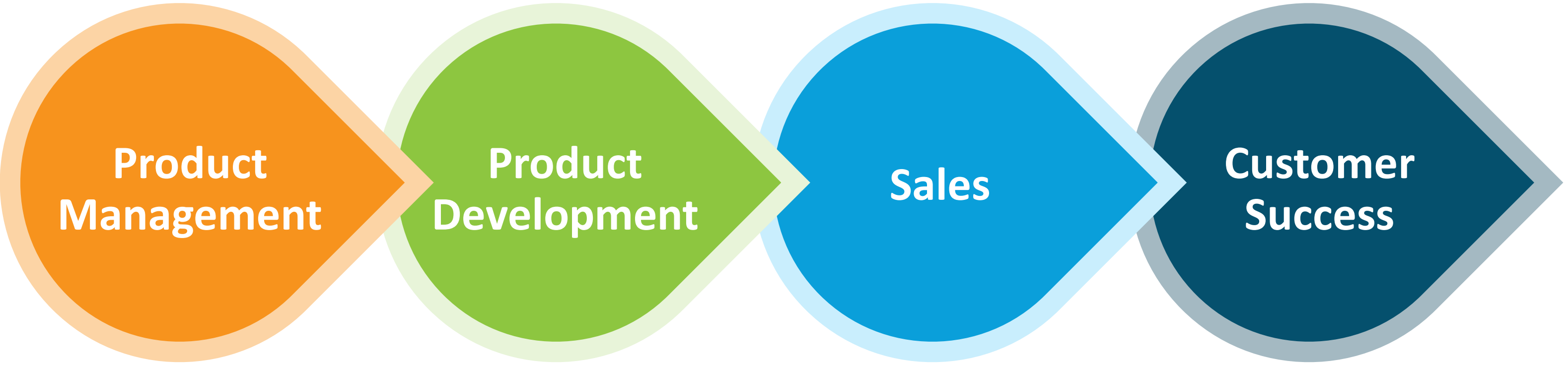
Building the C.S. Practice

Biggest Partner Enablement Needs & Examples of Emerging Vendor Offerings

“Customer Success” Defined

CUSTOMER SUCCESS

“A proactive, holistic and organization-level approach that **leverages technology and real-time visibility** into customer activities to ensure your customers... continually and increasingly…**receive value** from your products/ services **over the course of their lifetime** as a customer.”



Define the Promise	Builds the Promise	Sells the Promise	Ensures Delivery of the Promise

“Customer Success” Defined

It was originally focused on SaaS only – and mostly about driving Adoption

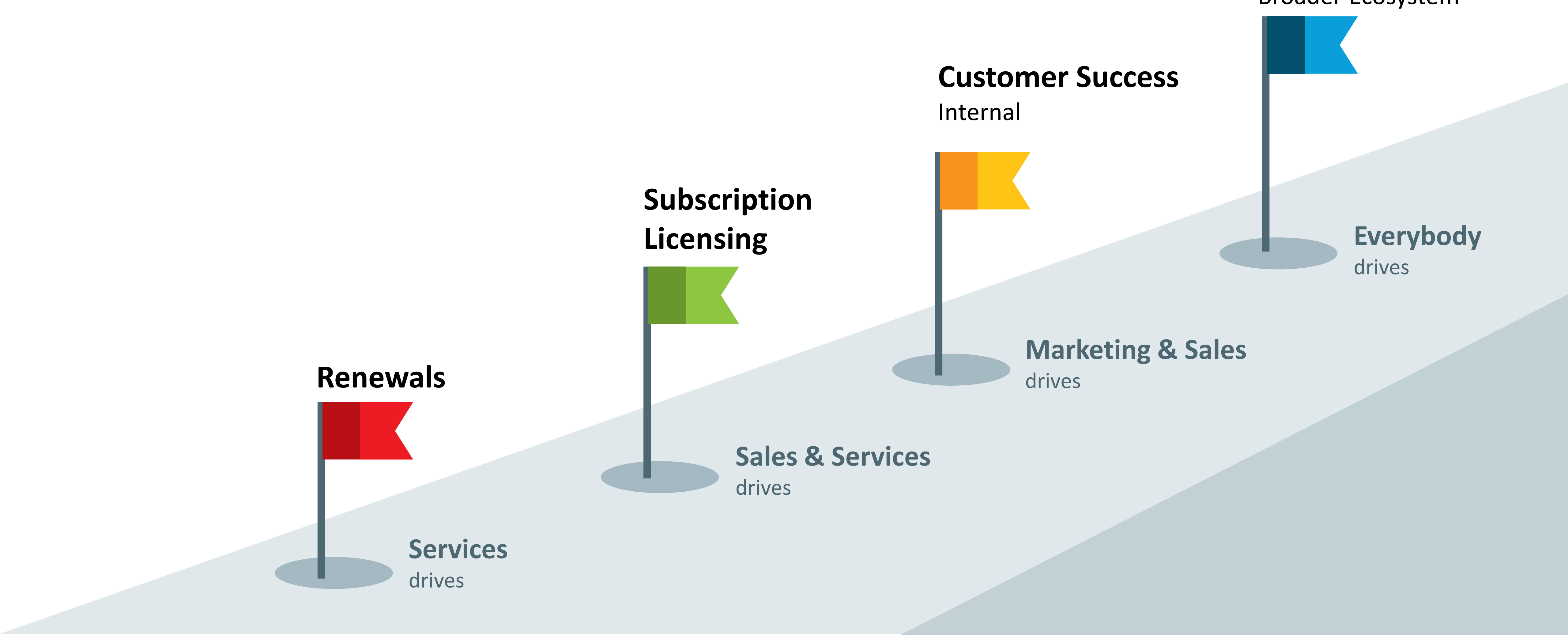
Adobe Microsoft salesforce workday

Now it’s about optimizing value along the entire customer lifecycle continuum – for <u>any</u> recurring revenue service or subscription-based offering!

amazon web services box cisco Dell Technologies

Fortinet Hewlett Packard Enterprise hp Managed Print Services Sophos

The Road to Managing Total Customer Experience



What Has to Change for both vendors and solution providers …?

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Two Approaches to Partner C.S. Engagement...

VARs, Agents, VAR/MSP Hybrids

Partner as Sales Agent

Manages customer interface & sells, but vendor drives the lifecycle with systems and data

AND/OR

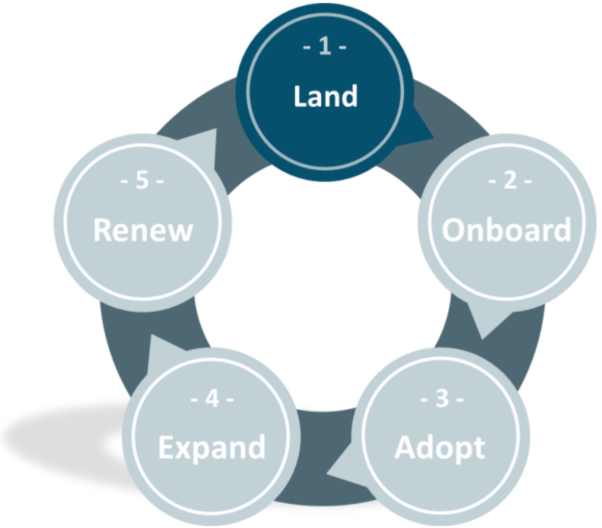
Mature MSPs, Service Providers

Partner as Customer Success Manager

Runs the whole lifecycle, supported by process, tools and data from the supplier(s)

Who Does What?

LAND



KPI's

- ✓ **Net-new customers under contract**
- ✓ **Multi-year agreements**
- ✓ **Devices or users under contract (service footprint)**

PARTNER ROLE(s)

PARTNER AS SALES AGENT	PARTNER AS CS MANAGER
• Education & cloud/subscription value prop • Define customer need(s) – start Customer Success planning • **Assessment & Health Checks** • **Initiates trial** • Establishes contract • Resells or influences service	*All of that, plus...* • Set up as partner-of record for ongoing asset management • Cloud migration and consulting work

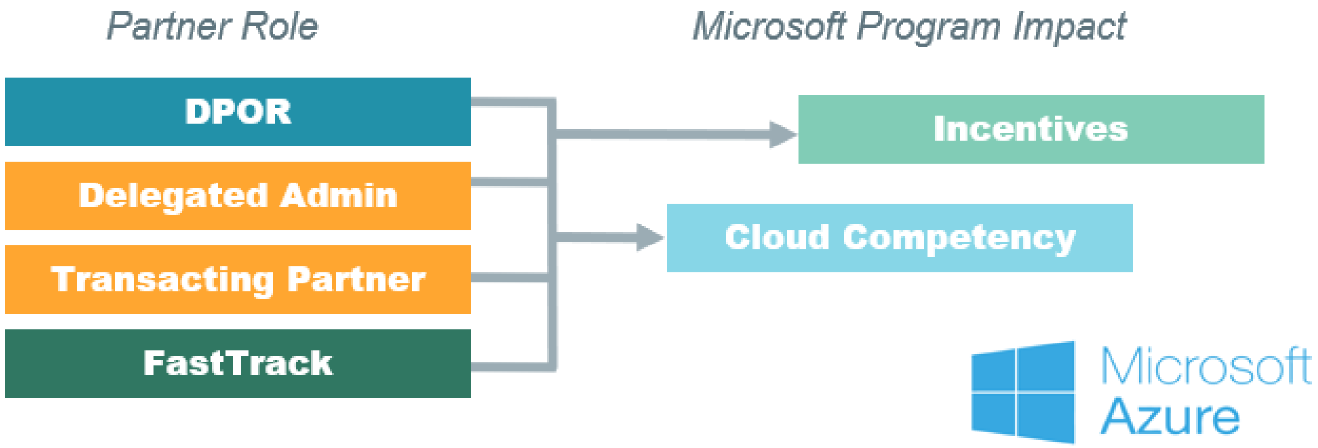
VENDOR ROLE

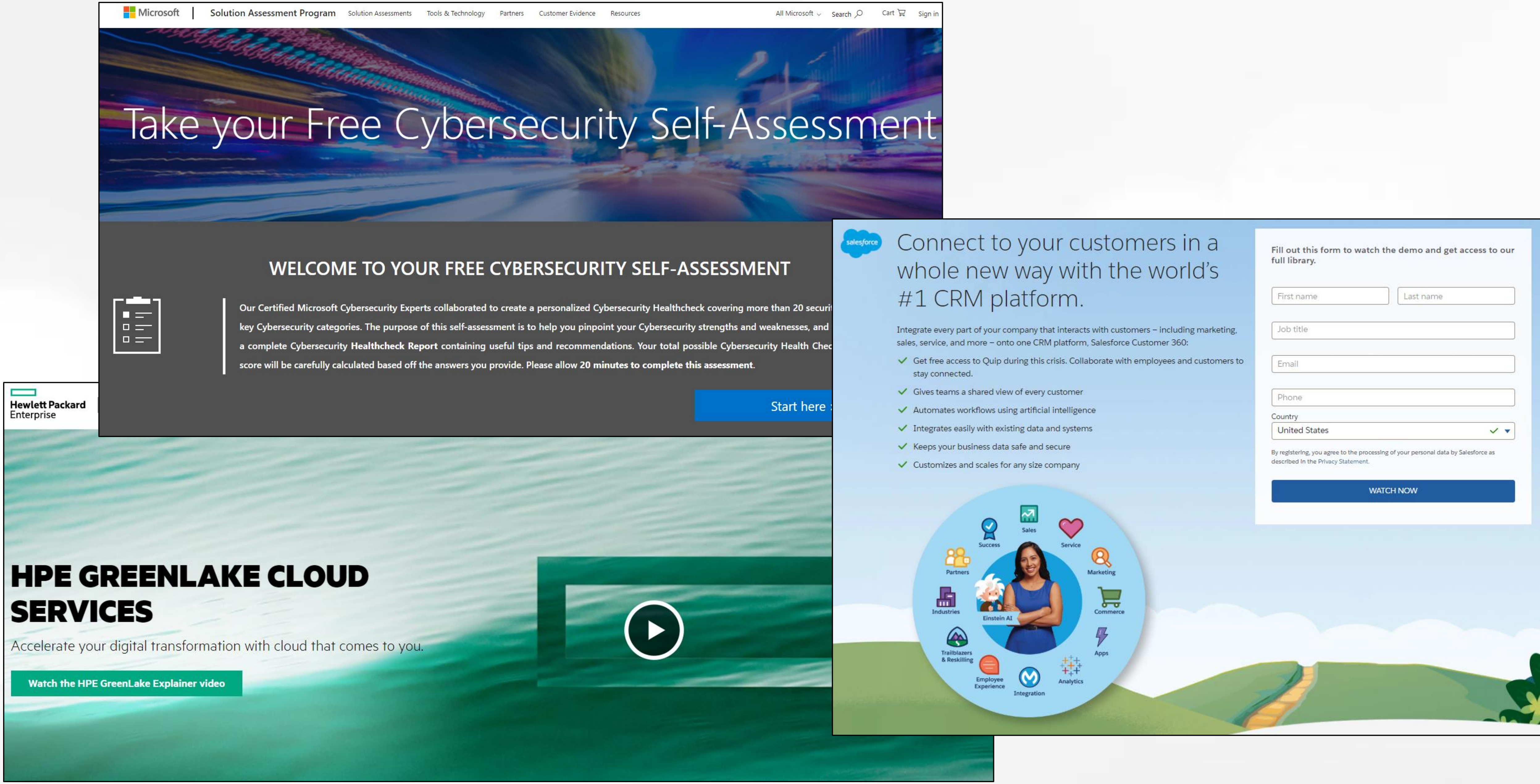
• Overall subscription/cloud value prop. content (verticalized) • **Specialized sales & technical staffing** • Sales tools (e.g. competitive positioning, prospecting guides) • **Offer trial license** • Sales tools • License mgmt. / automation platform • **Customer segmentation and ROE** • **Partner incentives**	*All of that, plus…* • **System tracking for partner-of-record** • Pre-sales assessment services methodologies & sharing of IP

Digital Partner of Record: Gain Credit & Competencies

Microsoft offers four ways for partners to be recognized and rewarded for driving cloud consumption; all point toward increased attainment of Cloud Competency Qualification.

- **Digital Partner of Record (DPOR) is the only one of the four partner roles or designations that receives financial incentives.**
- DPOR associates servicing partners to a Microsoft cloud subscription, **as designed by the customer on each new online subscription**.
- Benefits to partner for being a DROR, beyond incentives, is **accelerated qualification for Cloud Competencies** plus **reporting that provides a single view** into the revenue, usage, and consumption they drive for their customers.

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WELCOME TO YOUR FREE CYBERSECURITY SELF-ASSESSMENT
Our Certified Microsoft Cybersecurity Experts collaborated to create a personalized Cybersecurity Healthcheck covering more than 20 securi
key Cybersecurity categories. The purpose of this self-assessment is to help you pinpoint your Cybersecurity strengths and weaknesses, and
a complete Cybersecurity Healthcheck Report containing useful tips and recommendations. Your total possible Cybersecurity Health Chec
score will be carefully calculated based off the answers you provide. Please allow 20 minutes to complete this assessment.
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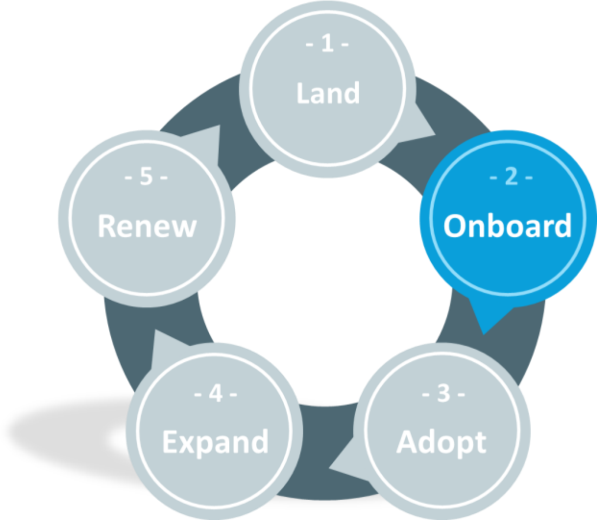
Who Does What?

ONBOARD



KPI's

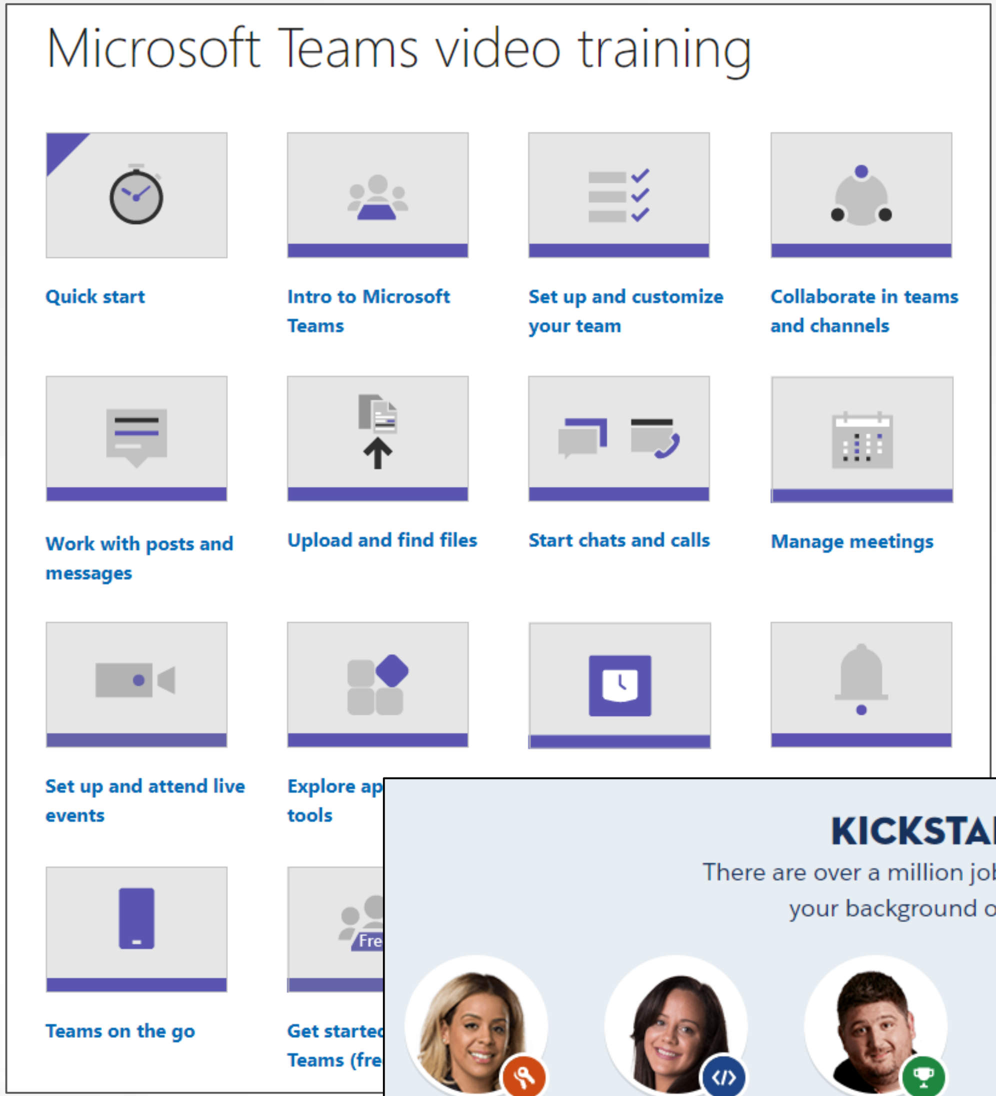
- ✓ **Speed of onboarding & customer engagement (<30 days)**
- ✓ **Conversion speed from trial license**

PARTNER ROLE(s)

PARTNER AS SALES AGENT	PARTNER AS CS MANAGER
Guide customer through vendor training & onboarding content	• Hire CSM role • Customer goal-setting & definition of KPIs (Success Plan) • **User training delivery** • Configuration and installation • **Software Integration svs.** • **Data migration svs.**

VENDOR ROLE

	• **CSM role training & certification** • Playbooks (horizontal or vertical) • Customer use cases • **Tutorials or interactive onboarding content** • P2P collaboration with training partners or vendor training offerings


Microsoft Teams video training
Quick start
Intro to Microsoft Teams
Set up and customize your team
Collaborate in teams and channels
Work with posts and messages
Upload and find files
Start chats and calls
Manage meetings
Set up and attend live events
Explore ap
tools
Teams on the go
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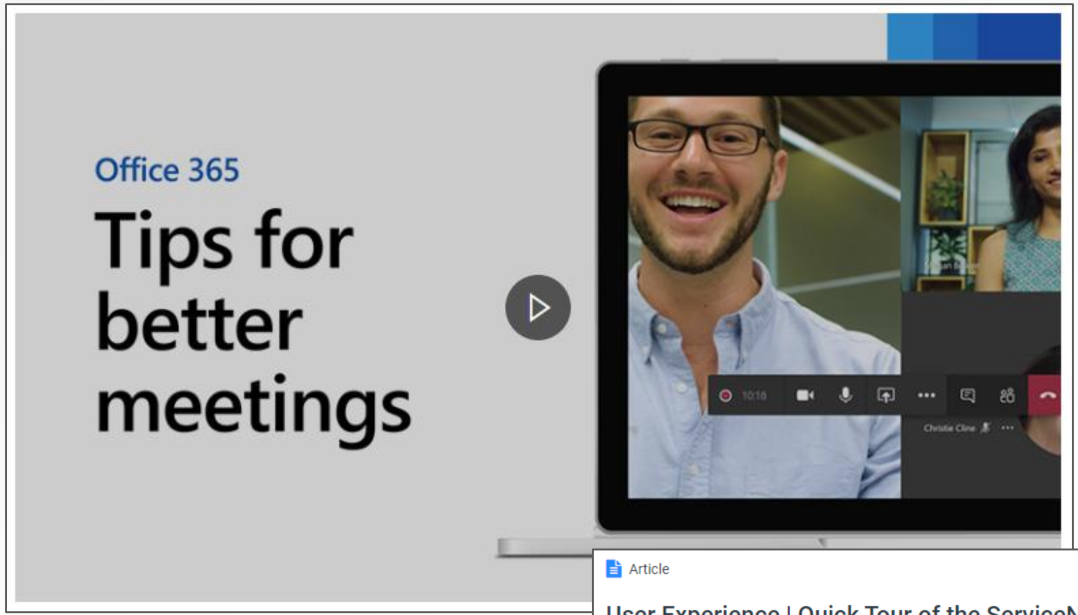
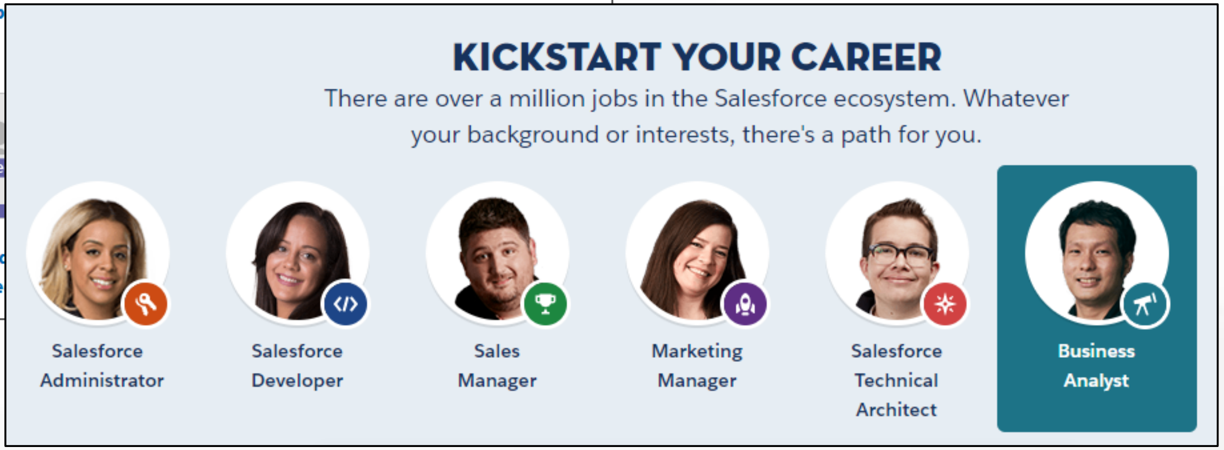
Teams (fre


Office 365
Tips for better meetings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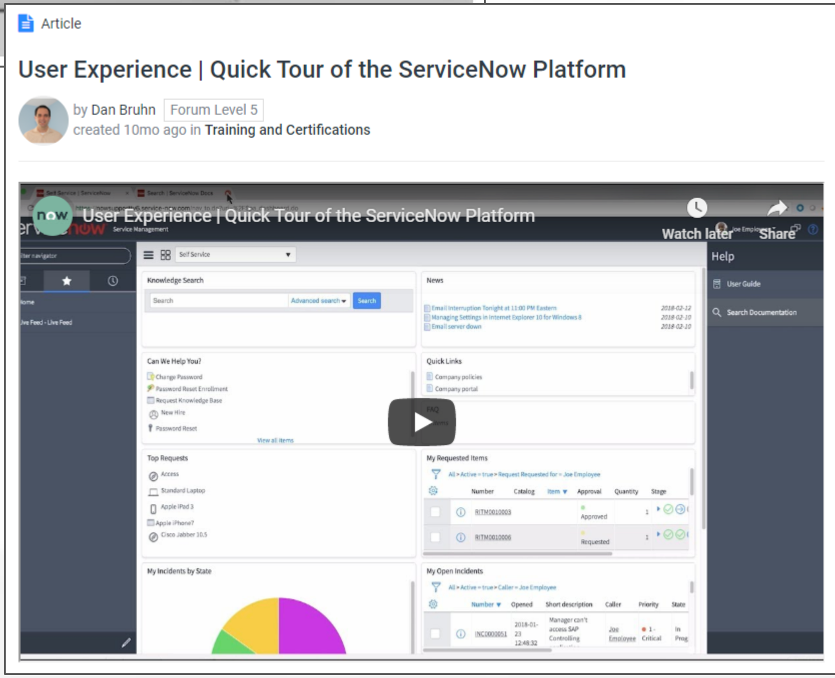
Article
User Experience | Quick Tour of the ServiceNow Platform
by Dan Bruhn Forum Level 5
created 10mo ago in Training and Certifications
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Hiring and Developing the Partner's CSM Role

CSM Responsibilities

1. Account Planning
2. Customer Kickoff
3. Solution Deployment
4. Initial Training
5. Customer Launch

Selected Offer

- AMP
- Collab-EA
- Cisco DNA Center
- NGFW
- SNTC

Account Planning

Before meeting with the customer, review the customer information and discuss with the account team customer engagement.

CSM actions (click for detail)

1. Account team notifies CSM of new sale and reviews final version of what was purchased with the CSM (incl. contract/agreement details)
2. Review sales data and order information for the customer +
3. Conduct Account Planning meeting with Cisco and key stakeholders +
4. Validate Smart Account +
5. Draft a Success Plan and prepare for customer kick off

CISCO

The Customer Success Function Defined

Function	Customer Success			
Role/ Organization	Customer Success Manager (CSM)			
Components of Customer Success	Land/Onboard	Adopt	Expand	Renew
Component Activities	Service Enablement and Deployment to Users	Usage Analysis & Optimization Recommendations	Identify Opportunities for Upsell/Cross-sell	Proactive Renewal Management
Activity Metrics	Customer Activation and Usage	Utilization Patterns	Lead Generation	Renewal % and Churn $

CiTRiX Customer Success Services

ENABLE

Customer Success and Adoption eLearning access — **2 hours**

ILT training on Citrix methodology — **2 days x 3 hrs./day**

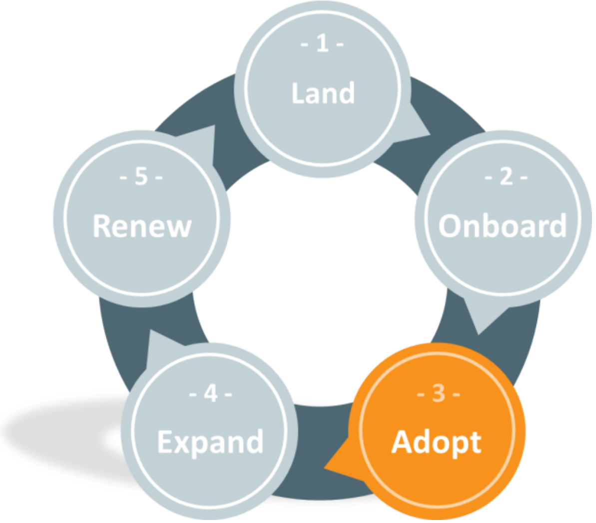
Access to our tools and resources

Enablement Phase

- 7 Kick off
- 8 Instructor led Training
- 9 Customer Account Handover
- 10 Partner CSM Guidance Calls **(weekly)**
- 11 Program Progress Checkpoints
- 12 13 Week Success Debrief
  - Positive trend in portfolio AU
  - Positive Customer NPS
  - Full program participation

Access to a **Customer Success Engineer**
- delivered at no-charge for >100 licenses with/through the partner (configuration & installation)

Who Does What?
ADOPT



KPI's

- ✓ **Numbers of adopted users**
- ✓ **Number of users adopting a certain feature**
- ✓ **Regularity of partner's customer touch** (in system)

PARTNER ROLE(s)

PARTNER AS SALES AGENT	PARTNER AS CS MANAGER
N/A	• CSM role • **Vertical expertise** to apply adoption to customer-relevant industry use cases • Managed services • Help Desk

VENDOR ROLE

PARTNER AS SALES AGENT	PARTNER AS CS MANAGER
N/A	• **CSM role training & certification** • **Adoption data tracking** • Adoption use cases (verticalized) • Adoption incentives to partners

" The days of adoption being the only charter for customer success organizations is now long gone. 63% of customer success organizations now have direct revenue responsibility. "

TSIA - State of Customer Success

Adoption Incentives

Use (Activate) Incentive – previously part of VIP33

- Earn rebates for activating and scaling software in a production network
- Proof of Performance based on software submitted via Proof of Performance (POP) process or through telemetry
- Fixed incentive for payment predictability
- Quarterly payments that you can attribute to relevant business cost centers

Adopt Incentive

- Continue earning rewards for driving adoption success
- New tiered model – earn higher incentives based on your investment and performance
- New performance metrics
- Eligibility requirements include Customer Experience Specialization or Advanced Customer Experience Specialization PLUS Advanced architecture specializations

Expand Incentive

- Get rewarded for expanding software bookings that result from your adoption success
- New tiered model rewards you more for higher investment and better performance
- New simplified Lifecycle Incentives offers
- Eligibility requirements include Customer Experience Specialization or Advanced Customer Experience Specialization PLUS Advanced architecture specializations

Customer Success Services

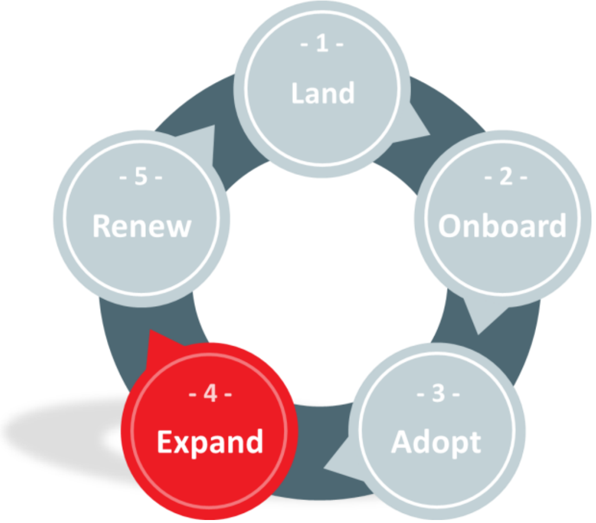
Success Management

Offers rebates to Customer Success Specialized partners (Gold & Platinum) that **sustain customer adoption rates of 60% active usage for 3 months in a row;** Pays % of TCV the following quarter*

* Requires success plan uploaded within 90 days and partner must have received Drive on the deal (value-added selling activities to close the deal)

Who Does What?

EXPAND



KPI's

- ✓ **User/device expansion rates**
- ✓ **Expansion to adjacent services/products**
- ✓ **Competitive service displacement**

PARTNER ROLE(s)

PARTNER AS SALES AGENT	PARTNER AS CS MANAGER
Quoting and billing (maybe)	• Customer forecasting of expansion opportunity (users, adjacent services) • **Quoting and billing**

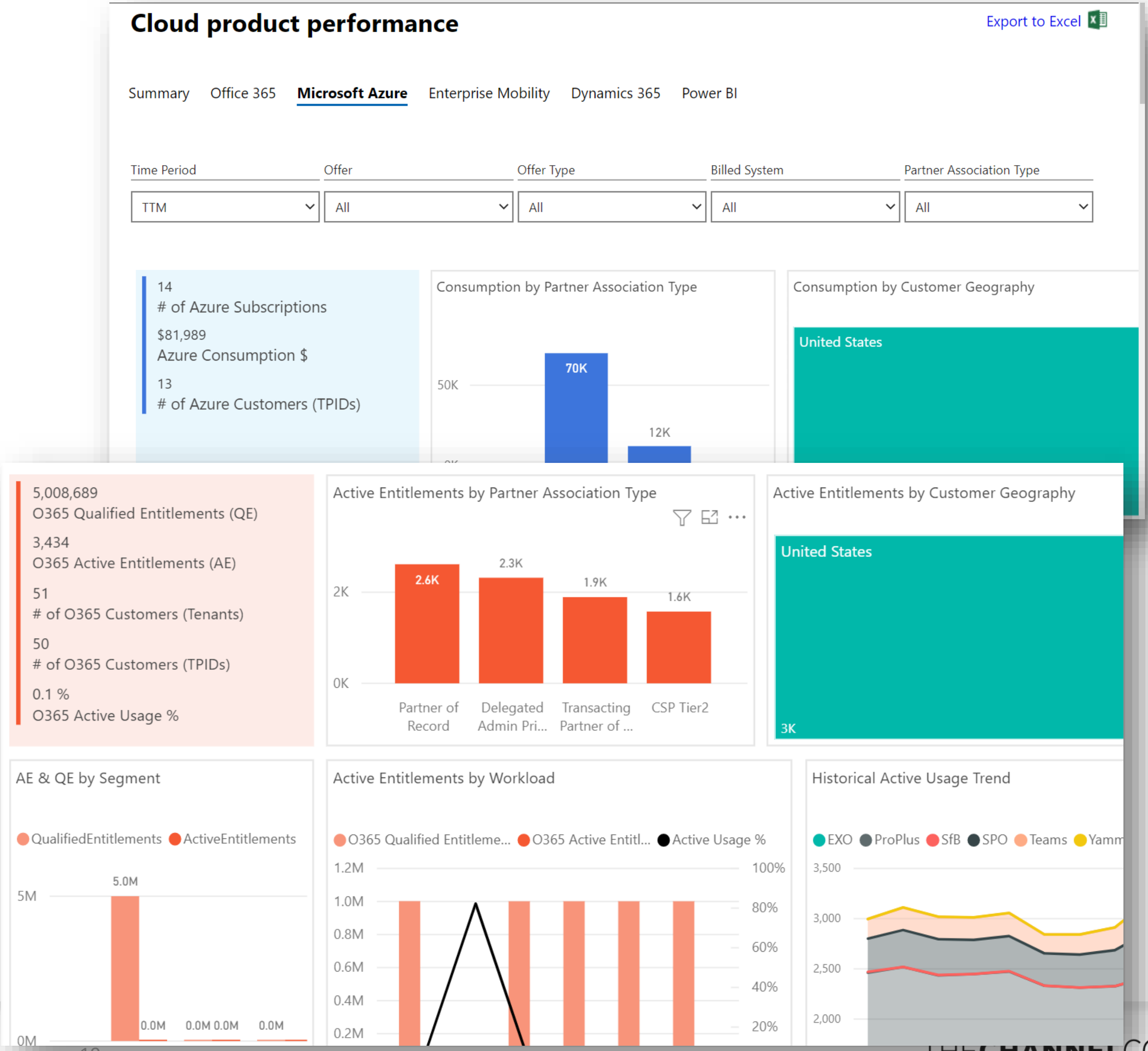
VENDOR ROLE

N/A	• Use cases and methodology for expansion sales opportunities • Usage data across broad customer & partner sets (benchmarking) • **Incentives to partners for services expansion** • Cross-portfolio training & certification

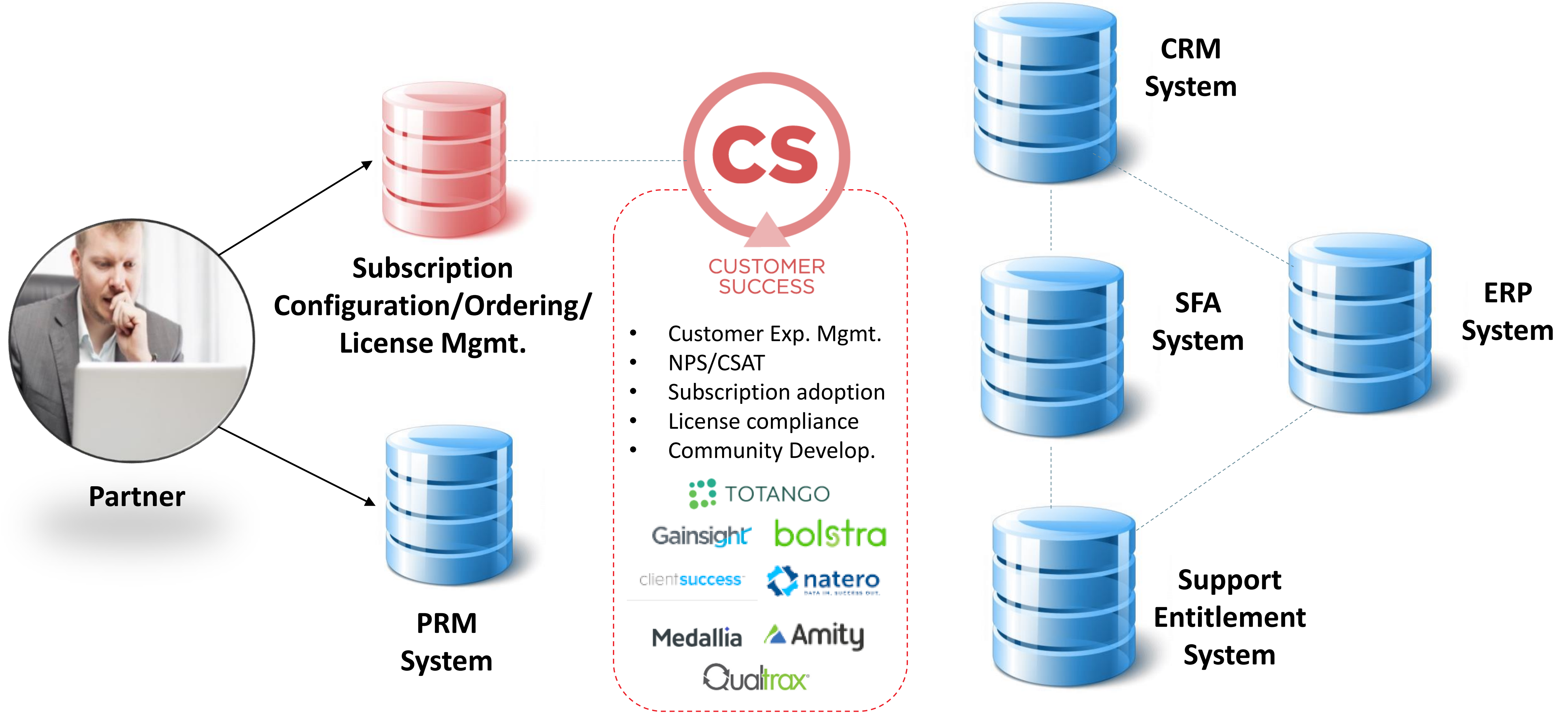
Microsoft Automation: License Management

The CSP portal provides one place for CSPs to manage all their Microsoft subscriptions and **ensure changes are automatically synced between Microsoft and their professional services automation (PSA) tool.**

Today the CSP Portal supports ConnectWise and Autotask; Plans to expand API support to include Netsuite, Business Central and ServiceNow. (in the MS Marketplace)

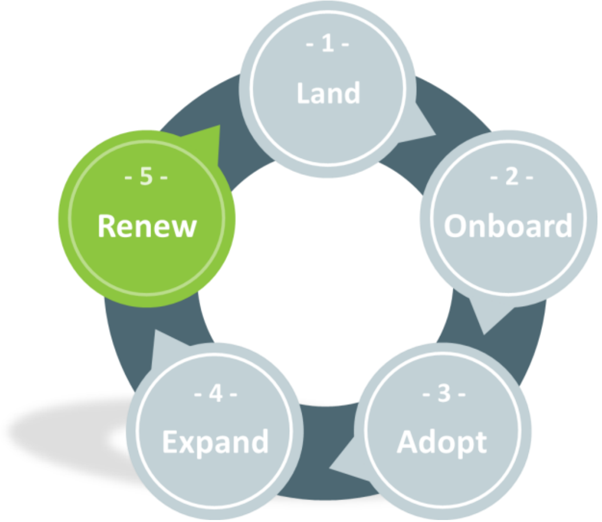


The Data and Automation Gap



Who Does What?

RENEW



KPI's

- ✓ **Min. % of renewals across customers served**
- ✓ **Services expansion at point of renewal**
- ✓ **CSAT or NPS at point of renewal**

PARTNER ROLE(s)

PARTNER AS SALES AGENT	PARTNER AS CS MANAGER
• Combine third party products/services into larger renewal opportunity • Tracking of reason codes for non-renewal • **Quoting and billing of renewal transaction**	*All of this, plus...* • **Measure NPS or CSAT** • Ability to up-sell or extend contract at point of renewal • Co-term management

VENDOR ROLE

• **Prompt to partner for renewal from automation system (60-90 days prior)** • Sales tools or messaging to support renewal value prop (added features, etc.)	• Incentives for renewal rates >80%

Salesforce.com & Measuring CSAT

CSAT Required Questions and Scoring

salesforce

Questions

Q1. Overall, how satisfied are you with your partner engagement?

Q2. Considering the outcomes of the engagement, relative to the resources invested, how would you rate its overall value?

Q3. How do you rate the overall performance of the partner team?

More specifically, how do you rate the partner team with respect to…

- **Q4.** Scoping the engagement to meet your objectives
- **Q5.** Keeping you informed of the engagement status/progress
- **Q6.** Communicating solutions effectively
- **Q7.** Appropriately managing risk
- **Q8.** Applying knowledge of Salesforce products and technology to your business needs
- **Q9.** Producing valuable outcomes
- **Q10.** Ensuring you are enabled to maintain your solution(s) going forward

Q11. What would you want prospective clients to know about your experience with this partner? **Optional/Open Text**

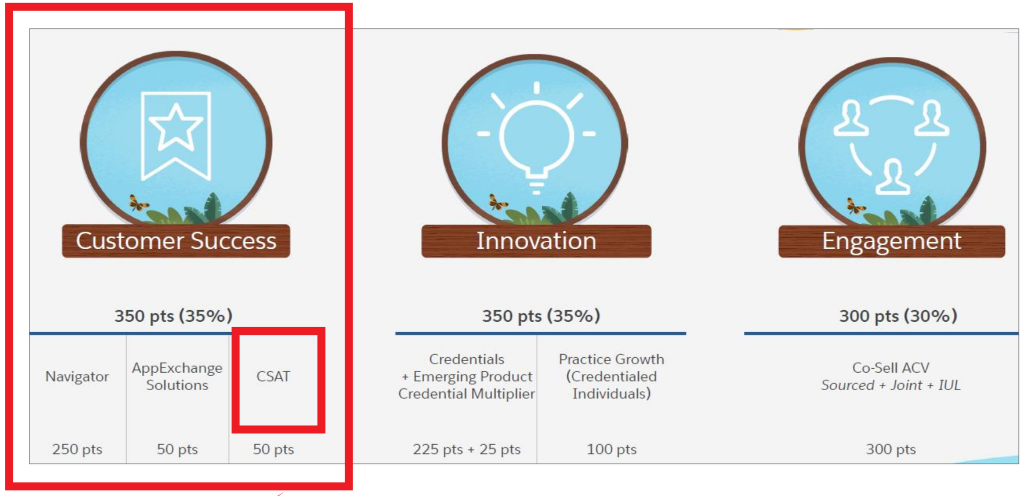
Trailblazer Scoring

Average Score* is greater than or equal to…	Trailblazer Points Awarded
4.2	10
4.4	20
4.6	30
4.8	40
4.9	50

*A partner's CSAT score is derived from an average across all projects completed in the current Fiscal Year

"Partner Trailblazer" Score

salesforce Trailblazer COMMUNITY



Optional Engagement Type Questions

salesforce

Shown depending on the engagement type. **Does not impact CSAT score.**

Lightning Migration	Org Improvement	Managed Services	PDO	User Training

- Measured across 1000's of partners, globally
- Measured at the project level, based on successful implementations

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Building the Customer Success Practice

- Executive Sponsor
- Practice lead
- Customer Success Manager(s)
- Renewals Manager(s)
- Operations leader

- Customer journey maps
- Defining business outcomes & KPI’s
- Onboarding process
- Stages, actions & exit criteria defined
- Risk and expansion triggers
- Sales & CS team collaboration
- Customer Survey/NPS/CSAT

- Playbooks
- Customer Health scoring/dashboard
- License & contract mgmt. automation
- eCommerce platform
- Contract & license mgmt.
- RMM/PSA linkage

- Deep customer profiling
- KPI’s (revenue + activity)
- Use cases
- Telemetry data
- Lifecycle advancement metrics
- At-risk data

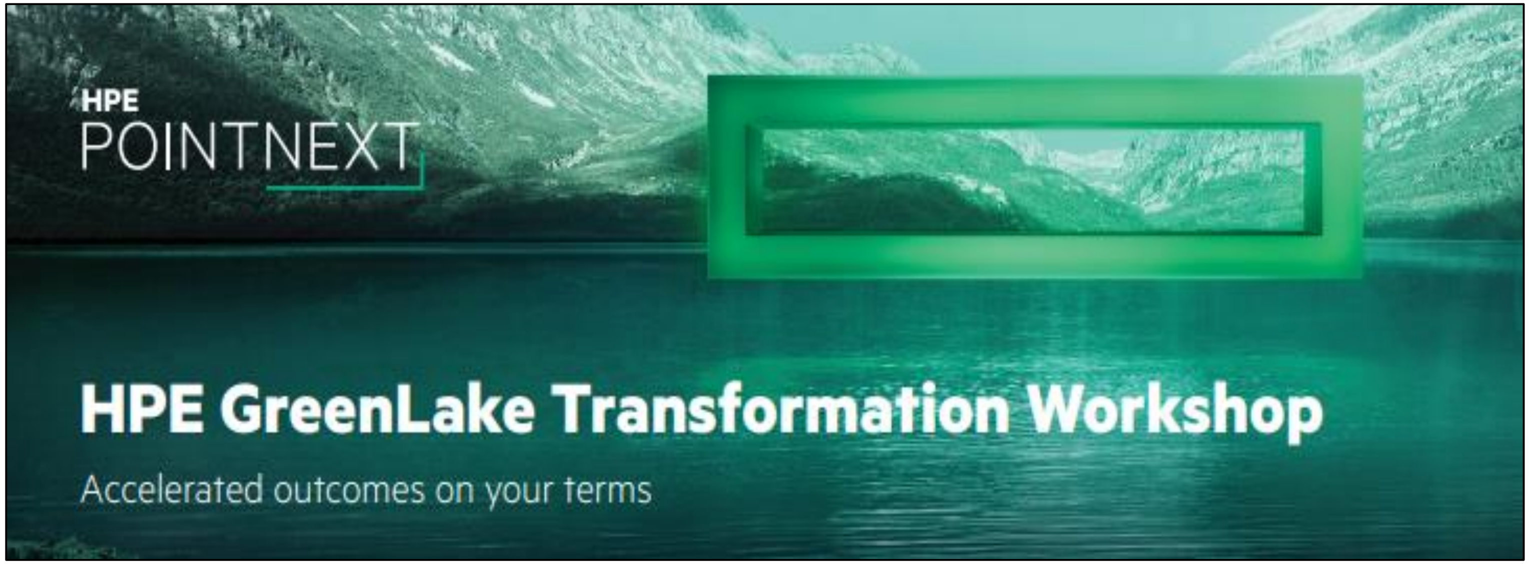
Building the Practice: HPE Transformation Workshops

Hewlett Packard Enterprise

Goal: Building a plan to become a consumption-based business

- Done with KPMG initially; now done in-house, virtually
- Staffed **by HPE Transformation Managers**; including HP Financial Services staff
  - CSM internal role that works with pilot set of partners
- Participation from partner C-level executive and cross-functional team
- Leveraging tools in SalesPro, TechPro and Seismic platforms

KPMG

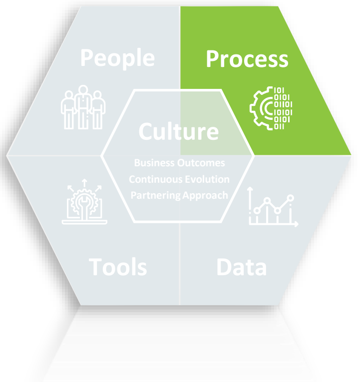


Challenges to be Addressed

Workshop Agenda:

- Alignment with corporate direction
- Crossing the chasm with revenue impact
- Install base focus vs. net-new logo expansion
- Staffing models (sales, technical, support)
- Sales compensation

Process: KPI's Need to Shift



Financial KPI's

1 Revenue Source Breakdown
2 Business Offering Margins
3 Effective Rate Per Customer
4 Effective Rate Per Offering
5 Customer Distribution

Service Desk KPI's

6 Resource Utilization
7 SLA Compliance
8 Percentage of Billable Hours
9 Tickets Per Customer
10 Tickets Per Technology
11 Average Resolution Time
12 Satisfaction Rating

Focus is:
- ✓ **Efficiency**
- ✓ **Contract compliance**
- ✓ **Resource utilization**
- ✓ **Support response**

SLA's & Profitability!

Focus is:
- ✓ **Engagement**
- ✓ **Utilization**
- ✓ **Expansion**

Customer Happiness!

Customer Success – Health Score KPI's ("Churn Indicators")

1 Conversion from trial license
2 Number of users
3 Product feature utilization:
   - frequency
   - length of time
4 Gross churn & net retention
5 NPS or CSAT scores

Staffing: Vendor Practice Requirements

	Customer Experience Specialization	Advanced Customer Experience Specialization
People and Organization	• 2 Cisco Certified Customer Success Managers (CSMs) • 1 Renewal Manager (Exam) • Executive Sponsor	• 3 Cisco Certified CSMs • 1 Renewal Manager (Exam) • 1 Customer Success Practice Leader • Executive Sponsor

Role Requirements

Customer Success Manager

Owns Customer Success

Accountable for customer success

Ensures customers maximize the value of their technology investments throughout their complete lifecycle

Renewals Manager

Owns Renewal Opportunities

Owns renewals opportunities

Manages recurring revenue risk assessment and drives renewal execution

Executive Sponsor

Owns Budget & Accountability

Responsible for alignment to senior leadership

Full budgetary accountability

Responsible for strategy and creating accountability for execution

Customer Success Practice Lead

Owns Strategy & Development

Senior leader of Customer Success team

Supports practice development & growth

Sets strategy for Customer Success practice

Manages escalations

	Customer Success Manager	Renewals Manager	Executive Sponsor	Customer Success Practice Lead
Required for Customer Experience Specialization	✓	✓	✓	✗
Required for **Advanced** Customer Experience Specialization	✓	✓	✓	✓
Individual Certification (+Proctored Exam)	✓	✗	✗	✗
Verification Exam (Not Proctored)	✗	✓	✗	✗

cisco

Architecture Specializations

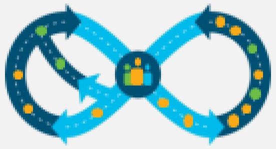
Deep Technical Expertise

- Networking
- Collaboration
- Security
- Data Center
- Service Provider Technology

Business Practice Specializations

Focused on Practice Capabilities

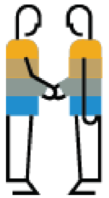
New Customer Experience Specialization



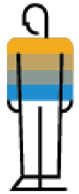
SAP Customer Success Enablement

SAP Cloud Customer Engagement
Customer Lifecycle Management Playbook for Partners

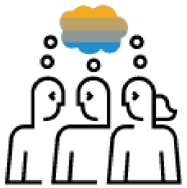
Recommended CEE to Customer Account Management Ratio
Your organization's capacity to perform customer engagement activities is an investment that needs to scale with the size of your cloud customer install-base. Below is a suggested ratio of CEE to Customer Accounts:



Start (~1-10 Customers)
- Align a resource that understands the customer engagement strategy, CLM methodology and has completed the CEE training
- Can be dual-role to start (e.g. combined with delivery), but must have specific accountability for customer retention and satisfaction
- Establish a value roadmap approach, driving customers along the roadmap to value realization



Ramping (~11-50 Customers)
- Formalized roles: 1-2+ dedicated CEE resources
- A general benchmark is to add one CEE per \$1m – \$2m ARR
- Begin developing own customer-engagement content by use-case and customer journey phases
- Build customer dashboards and focus on satisfaction



@Scale (51+ Customers)
- A dedicated CEE team
- Standardize customer engagement content and value propositions
- Leverage SAP community and self-help content and drive automation
- Allocate resources based on customer value and strategic relationship

SAP requires all cloud partners to have at least one CSM (they call it Customer Engagement Executive – CEE); 100% compliance at this time

CEEs' roles can include a variety of tasks related to their partner organization's customer success approach, for example:

- Conducting the sales handoff
- Confirming the business case and monitoring KPIs
- Helping to build an adoption strategy
- Acting as a strategic advisor to a customer's leadership
- Serving as a customer advocate and catalyst
- Establishing a schedule of engagement with the appropriate people at the customer's organization
- Identifying upsell opportunities and coordinating with sales
- Monitoring upcoming renewals
- Identifying and reacting to risks and opportunities and reports to the rest of the organization

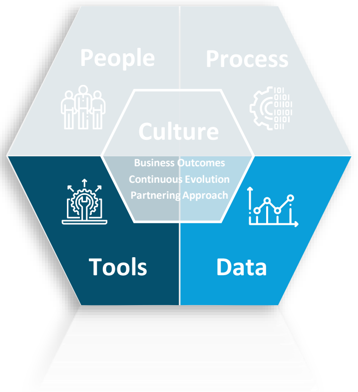
5.2 Managing the Renewal Process

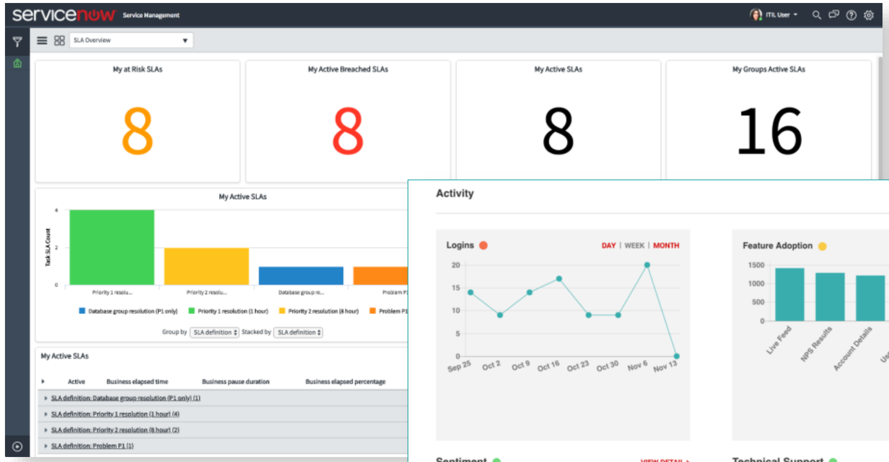
12-15 Months → 3-6 Months

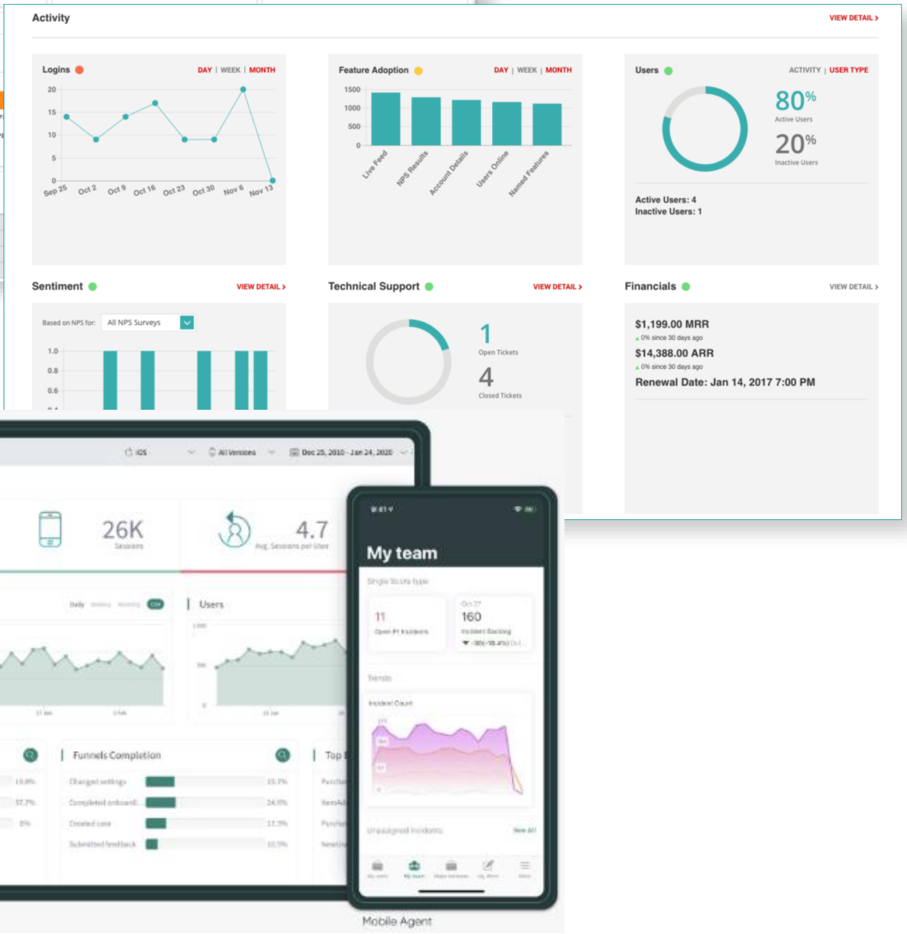
1. Review Customer Porfolio 2. Identify and Manage Risk 3. Execute Renewals

Source: SAP Customer Success team

The Critical Role of Automation Tools and Data

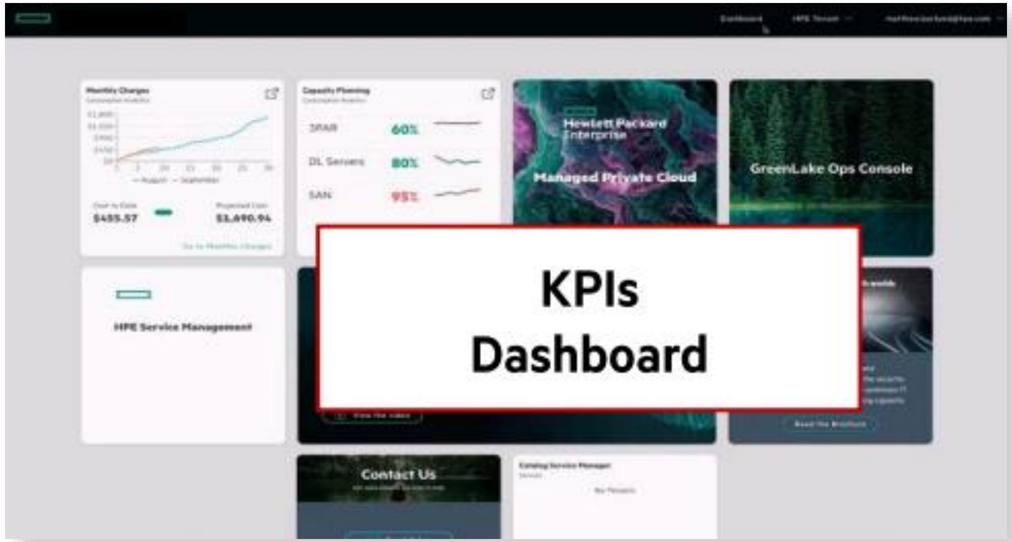






ServiceNow

Service management dashboards



HPE GreenLake Central – planning, provisioning and compliance management automation platform

SAP Partner Information Report (PIR)

- Monthly reporting to alert partners to the overall status and health of their cloud subscribed customers
- Evolving to be an automated, self-serve platform

3. License Compliance & Risk Assessment

[redacted]

License Type	# Licensed Users	# Active Users	Delta	Current Risk Assessment
Users - 360 Degree Reviews	85		85	High
Users - Goal Management	85	72	13	Low
Users - Performance Management	85	75	10	Low
Users - Learning, full use		9	-9	Low

[redacted]

License Type	# Licensed Users	# Active Users	Delta	Current Risk Assessment
Users - 360 Degree Reviews	3,000		3,000	High
Users - Compensation	3,000	2,954	46	Low
Users - Goal Management	3,000	1,087	1,913	Medium
Users - Performance Management	3,000	2,959	41	Low
Users - Variable Pay	3,000		3,000	High

7 Partner Information Report: CLM Reference

Refer to Chapter 2 for a description of the Partner Information Report (PIR). The information below is a reference guide for how the PIR can be used in each of the CLM Phases described in this Playbook.

PIR Section	Description of content	CLM Usage and Playbook Reference(s)
All Customers	• Customer names/ID • Contract start date • Contract end/renewal date	Confirming basic cloud contract details and renewal dates for each customer. • Relevant to all Playbook sections
Contact Details	• Name and email of key customer contacts	• 2.1 Customer Relationship Governance
Tenants	• Tenant name and datacenter • Unplanned and planned tenant downtime for previous month	Provides additional context for possible technical issues a customer may be experiencing. • 4.1 Adoption Scenarios and Strategies • 5.4 Risk Management
Renewal Risk Assessment / License Compliance	• # of licensed users • # of active users • # of assigned users (not available for all solutions) • Current renewal risk assessment	Identify over- or under-utilized solutions that may identify risk for upcoming renewals or opportunity for selling additional licenses. • 4.1 Adoption Scenarios and Strategies • 5.3 Review Customer Portfolio • 5.4 Risk Management • 6.2 Upsell Compliance
Incidents	• # of support incidents for the previous month, by severity	Identify potential customer health issues • 4.1 Adoption Scenarios and Strategies • 5.3 Review Customer Portfolio • 5.4 Risk Management
Application Data (not available for all solutions)	• Solution component usage data (e.g. Invoicing) and month-to-month trend	This provides an opportunity to better understand if the customer is using all application areas that fit their business case • 4.1 Adoption Scenarios and Strategies • 5.3 Review Customer Portfolio • 5.4 Risk Management

How Does Customer Success Show Up in Today's Vendor Programs?

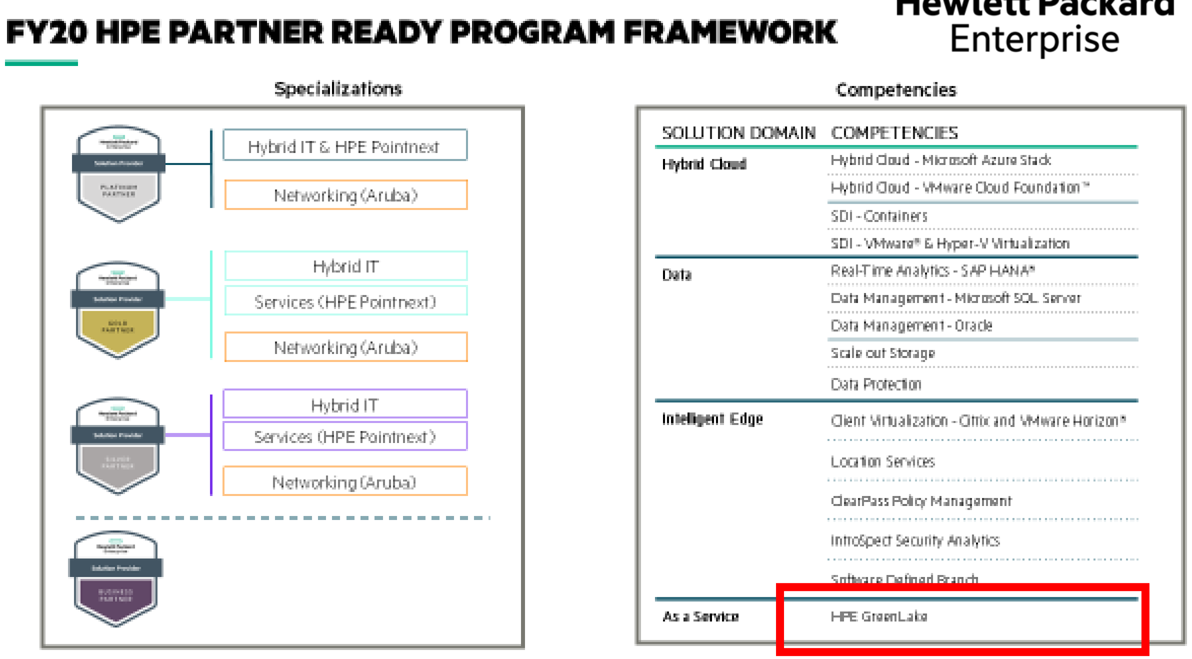
1. Its own Specialization or Competency

CISCO Partner
Customer Experience Specialized

CITRIX
Customer Success and Adoption
Preferred Partner
PROFICIENCY

2. Part of MSP/Service Provider Enablement

Hewlett Packard Enterprise



Supporting Vendor Tools & Process

CRITICAL

- ✓ Cultural commitment:
  - to "share" the Customer Success with partner(s)
  - to have the CSMs team collaborate with partners
- ✓ Customer Journey maps with defined stages
- ✓ A subscription/service automation system, with partner access

IMPORTANT

- ✓ Digital Partner of Record to align sales effort to partner
- ✓ Enablement – help partners build C.S. practices
- ✓ Use cases on adoption and expansion benefits
- ✓ Incentives to encourage partner KPIs at each step
- ✓ Supporting land & expand sales tools

IPED Customer Success Partner Readiness Checklist

Customer Success - Partners Readiness Checklist

READINESS ASSESSMENT - SUMMARY

Executive Sponsor	Name here
Channels Lead	Name here
Services Lead	Name here
Customer Success Lead	Name here
Operations Lead	Name here
Finance Lead	Name here

		Available Points	Self-Assessment Points
1	PARTNER STRATEGY & ROLES	100	50
2	PARTNER KPI'S AND PERFORMANCE TARGETS	100	60
3	PARTNER SEGMENTATION & TARGET PROFILES	100	65
4	PARTNER SUPPORT & ENABLEMENT REQUIREMENTS	100	60
5	STAFFING MODEL	100	50
	TOTALS	500	285

What is Your C.S. Partner Readiness Level?

Your Next Steps?

0-200	Formulating	Gain internal consensus on partner enablement strategy and performance KPI's
201- 300	Preparing	Establish programmatic approach and pilot; finalize roles for vendor vs. partner
301-400	Aspiring	Harness insights from pilot(s) and prepare tools, systems and staffing plan for pr
400-500	Optimizing	Refine partner performance data & reporting; optimize enablement resources &

Partner Strategy & Roles

In this section you're assessing the degree to which you've conceptualized the way customers play a role in your company's overall approach to Customer Experience Management and Customer Success

	Measurement Scale				
Element	1	2	3	4	5
	place an X in one column for each element, which best describes your current state				
Overall customer journey map - from corporate mktg. or Services		X			
Defined subscription based product/service offering			X		
Defined discounting and economic models for partner sale & delivery of subscription-based product/service offering			X		
Customer Success integrated into company Support offerings				X	
Defined customer segmentation for promotion of C.S. offerings, including partner-led or teamed segments		X			
Definition of partner roles as sales agent vs. C.S. Manager		X			
Definition of core vs. optional partner roles at each lifecycle stage		X			
Internal alignment on these defined partner roles & teaming with direct C.S. roles		X			
Expectations for partner staffing levels & roles to be "authorized" for Customer Success function(s)			X		
Determine if and how you'll actively promote partners' capabilities in C.S. as part of external marketing of partner ecosystem		X			
SUBTOTALS	0	24	18	8	
GRAND TOTAL	50				

Legend
1 - Missing or undeveloped
2 - In concept or formation stage
3 - In pilot stage, limited execution
4 - In production, but immature
5 - In production, established & mature

Summary - This Section	
TOTAL POINTS AVAILABLE	100
SELF-ASSESSMENT POINTS	50

Assessment Summary | 1. Partner Strategy & Roles (2) | 2.Partner KPI's & Perf. Target | 3. Target Profiles-Segmentation | 4. Partner Support - Enablement | 5. Partner Staffing Model

Partner Enablement & Support Plans

In this section, you establish your approach and resources for helping partners build out their C.S. capabilities and scale, and the incentives or milestones for their success in establishing a C.S. practice around your technology

	Measurement Scale				
Element	1	2	3	4	5
	place an X in one column for each element, which best describes your current state				
Prepare role-based partner training & certification content for CSM and Renewals role(s)		X			
Prepare role-based partner technical role (if applicable) content - installation, configuration, ongoing mgmt.			X		
Create content for partner C.S. workshop or practice building plans (staffing, marketing, sales process, etc.)			X		
Create customer onboarding process and supporting tools/content (videos, explainers, use cases) for partners				X	
Create digital marketing content/campaigns to support the adoption, expansion & renewal motions; ties to email/marketing automation systems & MDF programs			X		
Establish partner incentive models (Deal Reg., rebates, cost-offset) for land, adoption and renewal motions; tie to partner-of-record coding				X	
Determine the diversity and depth of sales content and use cases to be shared with partners (use cases, playbooks, etc.)					X
Determine your requirements for partners' own service-management automation system and what level of access you will provide them to your own systems (alerts vs. admin rights, etc.)		X			
Define the process map for communication between your systems and C.S. teams to the partners own sytems/team at each step of the LAER model (what comms. go to the partner, to the customer, remain in the			X		
Determine how you'll profile and market your C.S. ready partners to customers through corporate marketing			X		
SUBTOTALS	0	4	30	16	10
GRAND TOTAL	60				

Legend
1 - Missing or undeveloped
2 - In concept or formation stage
3 - In pilot stage, limited execution
4 - In production, but immature
5 - In production, established & mature

Summary - This Section	
TOTAL POINTS AVAILABLE	100
SELF-ASSESSMENT POINTS	60

Assessment Summary | 1. Partner Strategy & Roles (2) | 2.Partner KPI's & Perf. Target | 3. Target Profiles-Segmentation | 4. Partner Support - Enablement | 5. Partner Staffing Model

Channelytics®

PARTNER DATABASES
SP500
MPS500
+More Lists & Awards

RESEARCH
Market Intelligence
Trending Data
Vendor Imperatives

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Channelytics®

ADVISORY
Research Readouts
Inquiry Appointments
Executive Briefings

INSIGHTS
Expert Perspectives
Proven Practices
Operational Guidance

TOOL SETS
Frameworks & Guides
Playbooks & Templates
Channel Primers

Actionable Intelligence to Grow your Channel

- ✓ Research on topics at the forefront of the channel
- ✓ Actionable insights to fully leverage the data
- ✓ Playbooks and tools for quicker execution
- ✓ Advisory services tailored to your objectives
- ✓ Executive communities to network and collaborate

Vendor Programs & Benchmarks	Partner Marketing	Partner Profitability
Public Cloud Platform Providers	Managed Services	Channel Census
Channel Account Management	Route to Market Playbooks	Professional Services
App Development Services	Partner Enablement	Subscriber Request