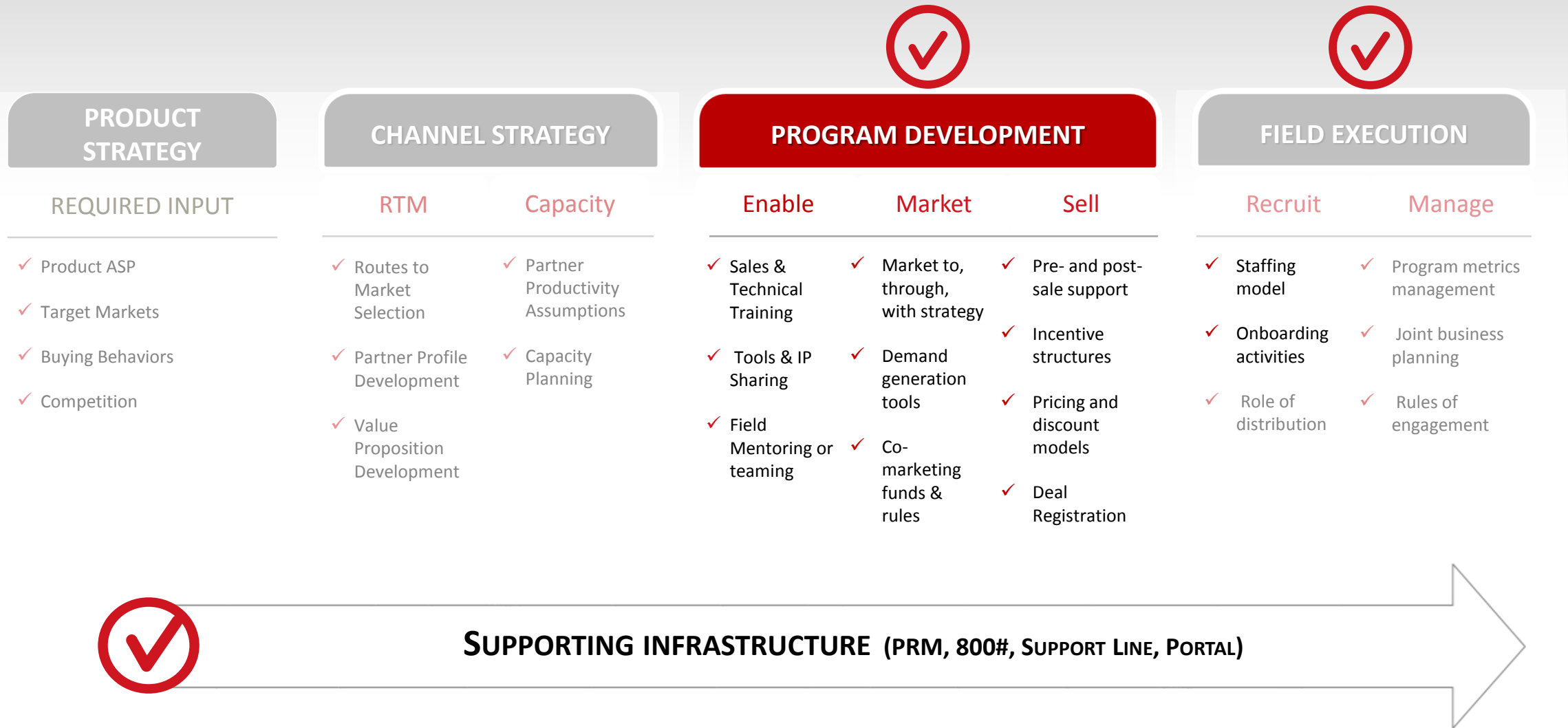


The background features a complex geometric pattern of overlapping triangles in various shades of red and white. A prominent white diagonal band runs from the top right towards the bottom left, creating a sense of movement and depth. The text is centered within this white band.

**Build the Partner Program &
On-boarding Plan
Phase 2**

Your Program Thoughts Should Include Coverage & On-boarding Thoughts



Partner Enablement & Management

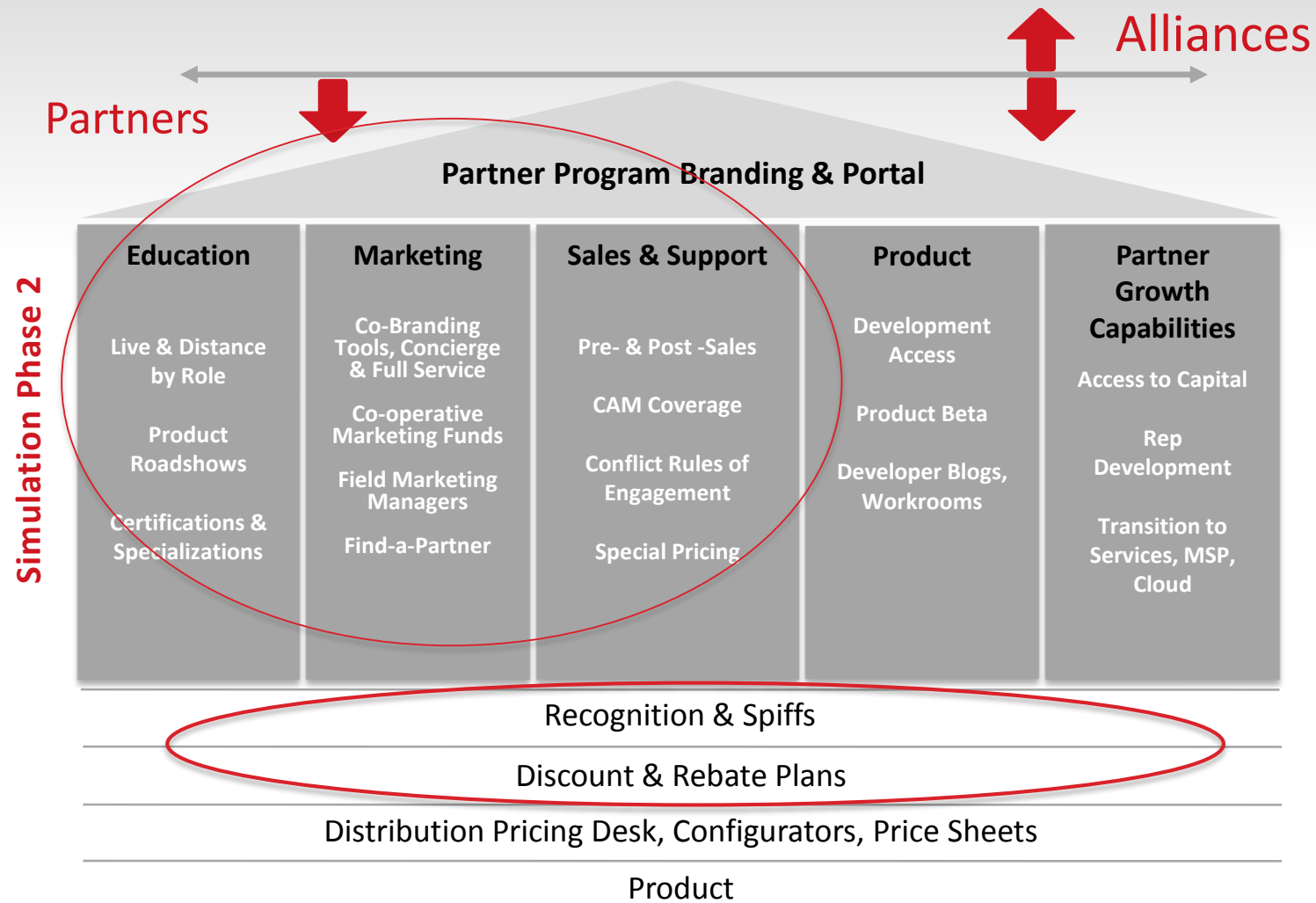
How You Manage Your Partners Depends On WHO They Are
As Well As “WHERE” They Are



- *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

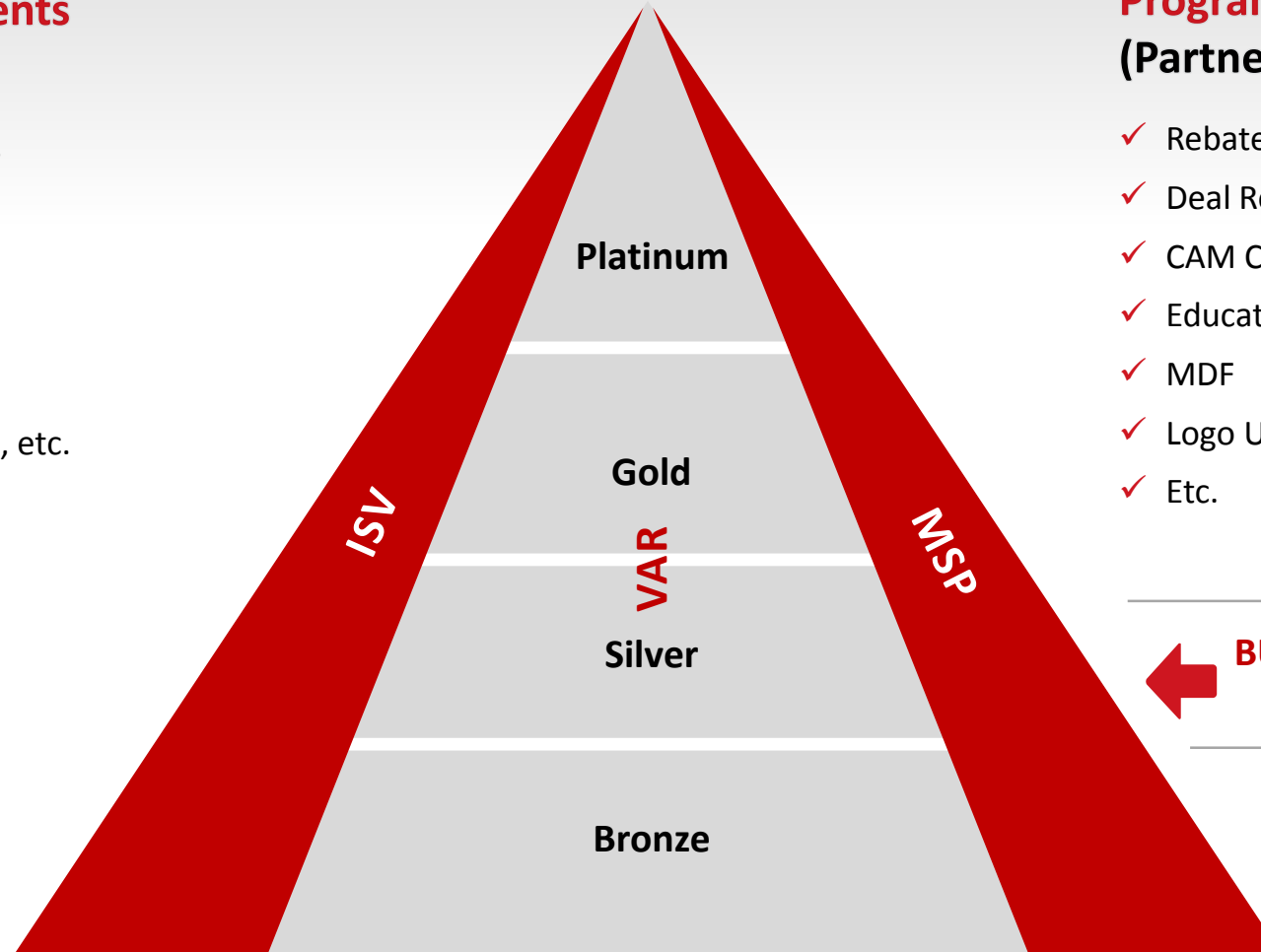
Sample Partner Program Benefits (Typically developed and differ by business model/track)



A Mature Program Would Include Multiple Levels & Tracks by Biz Model

Program Requirements (Partner GIVEs)

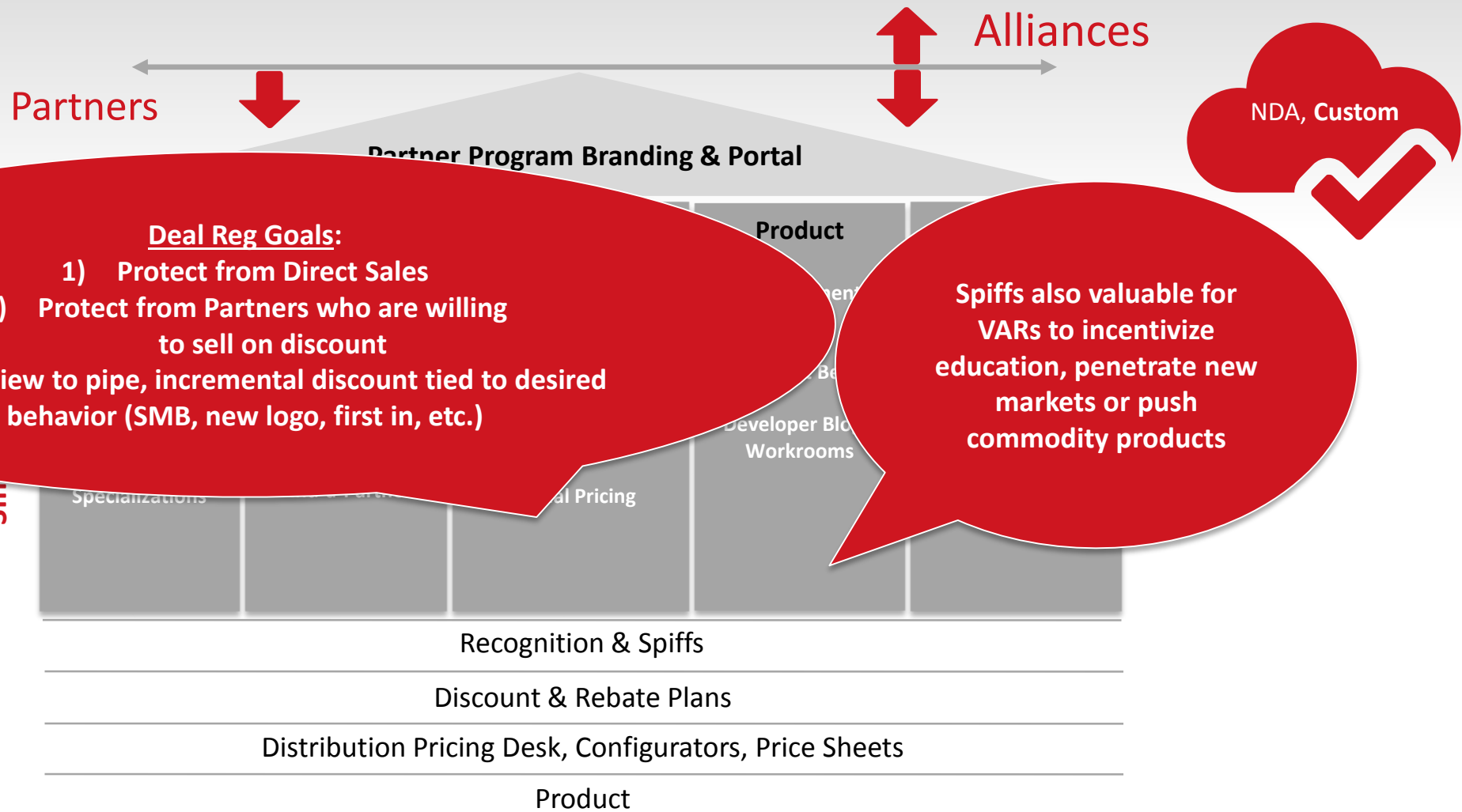
- ✓ Specialty Requirements
- ✓ Certifications
- ✓ Revenue
- ✓ References
- ✓ Customer Satisfaction
- ✓ To Earn Points or Levels, etc.



Program Benefits (Partner GETs)

- ✓ Rebates
- ✓ Deal Registration
- ✓ CAM Coverage
- ✓ Education
- ✓ MDF
- ✓ Logo Usage
- ✓ Etc.

11. Build First 3 Columns for Your Ideal Partner Profile: One Track, No Levels



11.1 Sales Education: Content Matters

Easy to Use

- ✓ 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

Leads to Sales

- ✓ 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

Product 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

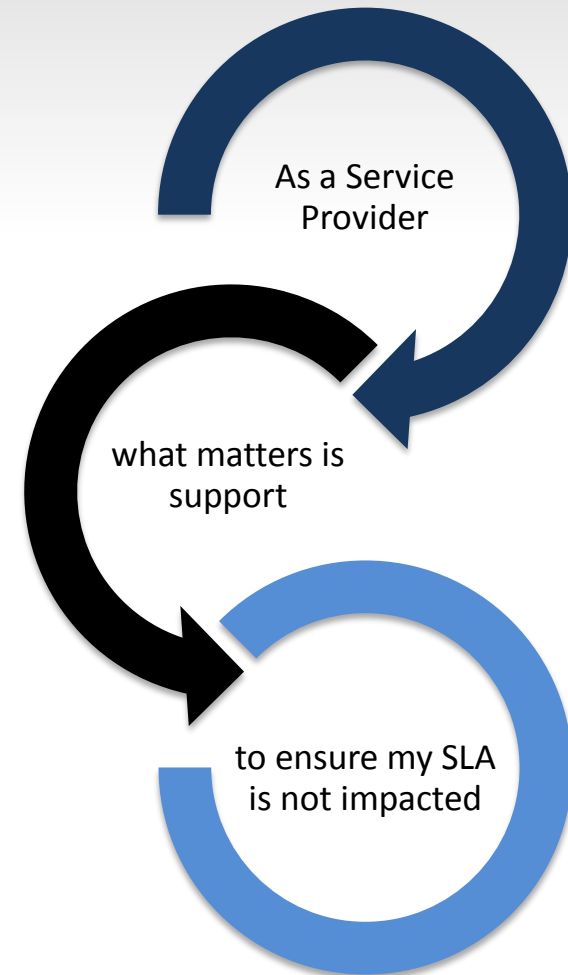
11.1 New Business Models Require New Education & Support Offerings

THE MSP EDUCATION PROCESS

"The right sales education is hard to find."



SUPPORT

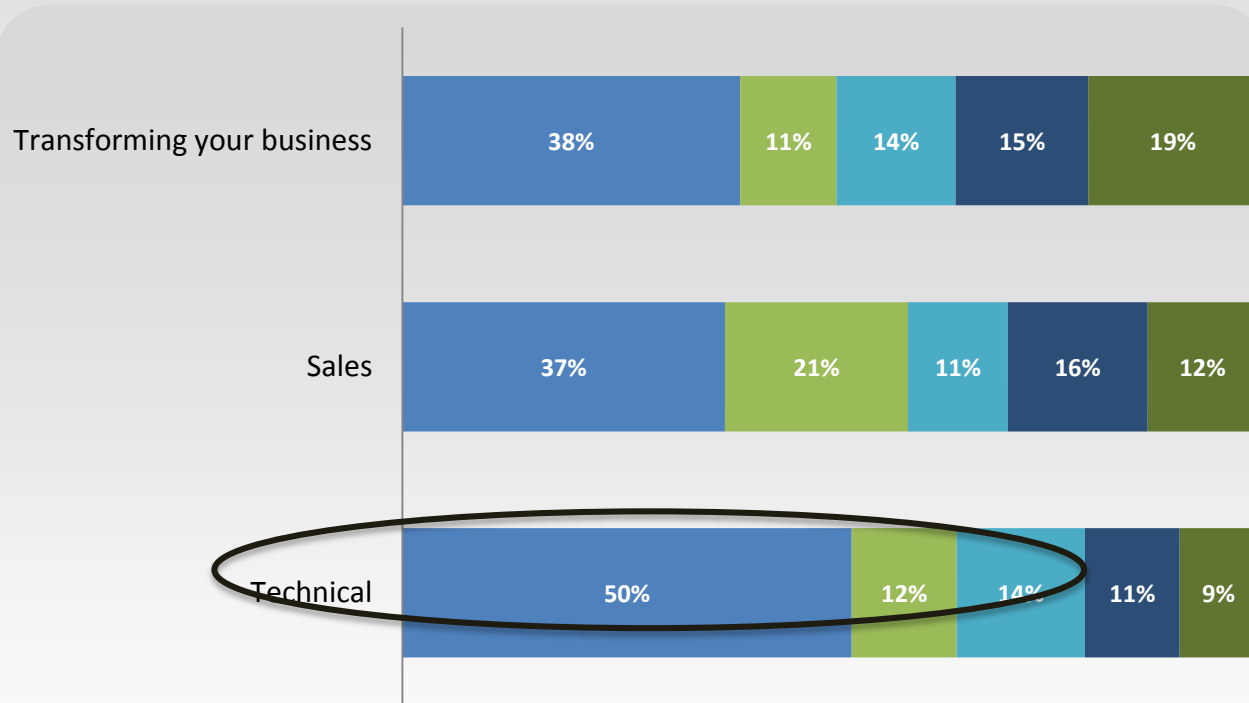


"Regarding education, our needs are a bit different. We're an MSP, web based, free or on-site for our team works. I don't think I should have to pay to understand how to sell the product."

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

Source: IPED Enablement and Marketing Study

11.1 Vendors Account for 50% of Technical Training Delivered with Distributors Delivering Roughly 12%



- Product or Service Vendor (e.g. Microsoft, Rackspace, etc.)
- Your Distributor
- An Association (e.g. CompTIA, HTG, etc.)
- Independent Consultant
- Don't know / Don't Use

“Our training is sourced from a combination of distributors and vendors.”

“Best of Breed is efficiency when we need it!

- *Basic features*
- *What business problem it solves or the intended purpose*
- *Why is it different or better than the alternatives*
- *Sizing, configuration and model differences”*

“Our CEO will not invest in non-technical training... I look at CRN, Infoweb, RSS feeds, network or vendors visiting. I don't need to pay CompTIA to tell us.”

“What matters is fast and efficient, let me download materials/audio and use while I drive.” (non-major metro area)

Q19e-Q19g: Whom do you believe is the most effective in delivering the following types of education or support?

11.1 Best of Breed Technical Education includes a “Virtual Sandbox” Lab

Vendor:



Compelling event: Citrix acquires XenSource

Objective: train global partner ecosystem on the newly acquired Citrix XenServer (virtualization technology)

- In a compressed timeframe
- Requiring a cost effective and on-demand delivery

Solution: Citrix XenServer integrated within the Toolwire “virtual sand box” platform. Provides each user the ability to access physical servers for the labs focusing on a range of technical topics. (e.g., users have the ability to install and configure Citrix XenServer components on a physical server as well as on a virtual machine image, as needed.)



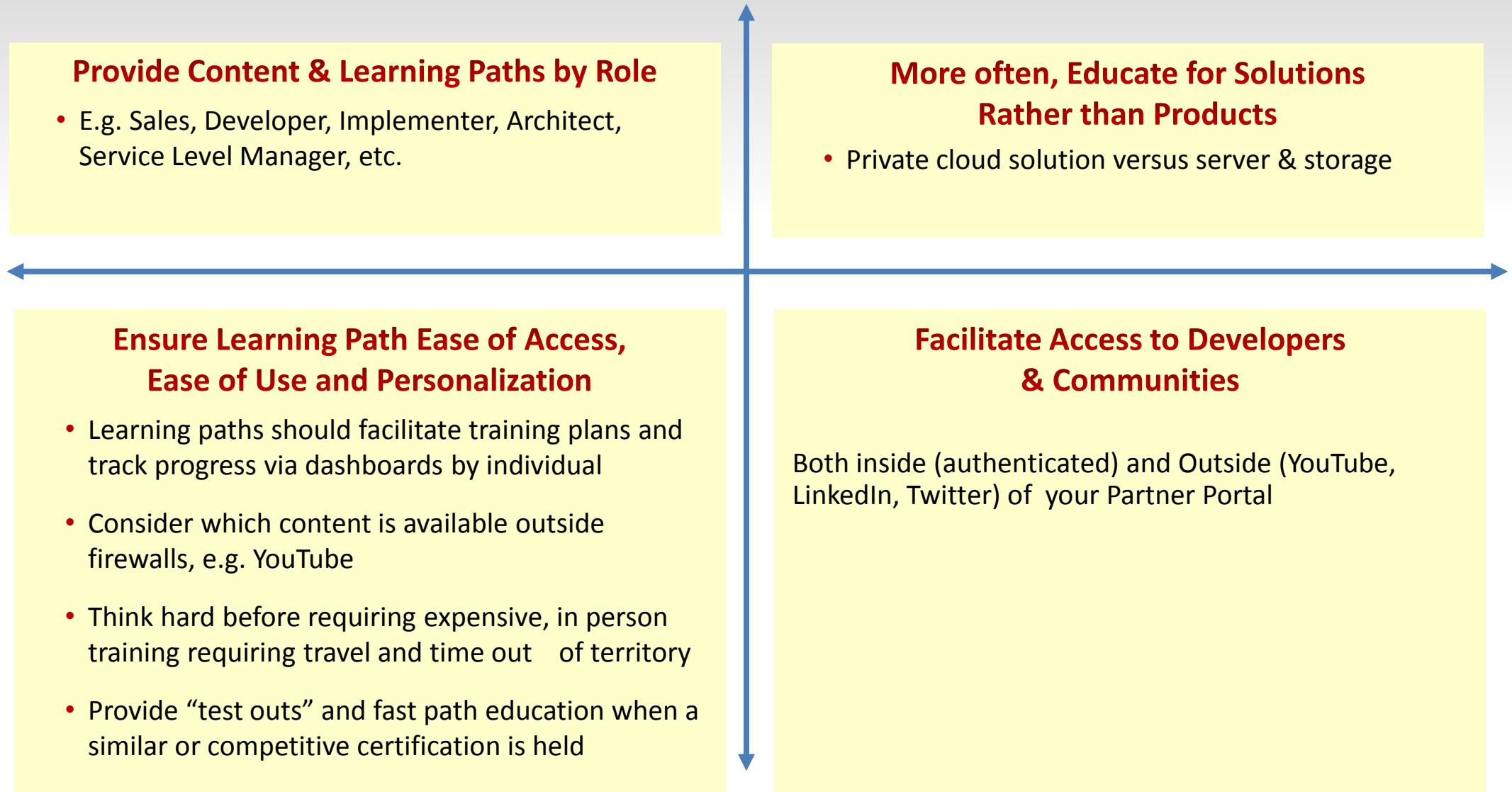
Supporting onsite, online, and hybrid classrooms. The “virtual sandbox” provides students with instant, on-demand access to virtual lab environments from the convenience of a web-browser and allows students to build technical skills.

"Working with Toolwire to develop and deliver an experiential training solution to meet our Citrix XenServer global training objectives has enabled us to cost effectively extend our training footprint. We see on-demand, hands-on training as a value add to our partners and a differentiator that will contribute to an increase in our global virtualization market share."

-Julieann Scalisi, Managing Director of Education for Citrix Systems

Source: <http://www.prnewswire.co.uk/news-releases/toolwire-to-deliver-virtual-hands-on-learning-for-citrix-xenserver-152658325.html>

11.1 Education Table Stakes



11.1 Education Best Practices

The New Builders Podcast

By IBM developerWorks TV

To listen to an audio podcast, mouse over the title and click Play. Open iTunes to download and subscri



[View in iTunes](#)

Description

Today's applications are central to decision-making at all levels of society - whether governments monitor critical infrastructure using smart sensor data, or helping cons buy their favorite brand of cereal. The New Builders podcast features interviews with apps, in which they reveal their best practices, latest projects and favorite tools.

	Name	Description	Released	P
1	Ep. 31: Data, Demos-N-...	This week, we're previ...	3/15/2017	Fi
2	Ep. 30: Meditations on Cl...	The TV landscape has ...	2/26/2017	Fi

- Virtual technical labs with continued access after class
- Mobile device delivered content
- Determine what must be ubiquitous and outside the firewall versus inside
- 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 differ.

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.



11.1 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.”

11.2 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.”

11.2 Partners Rank the Value of Marketing Benefits Available from You and Distribution

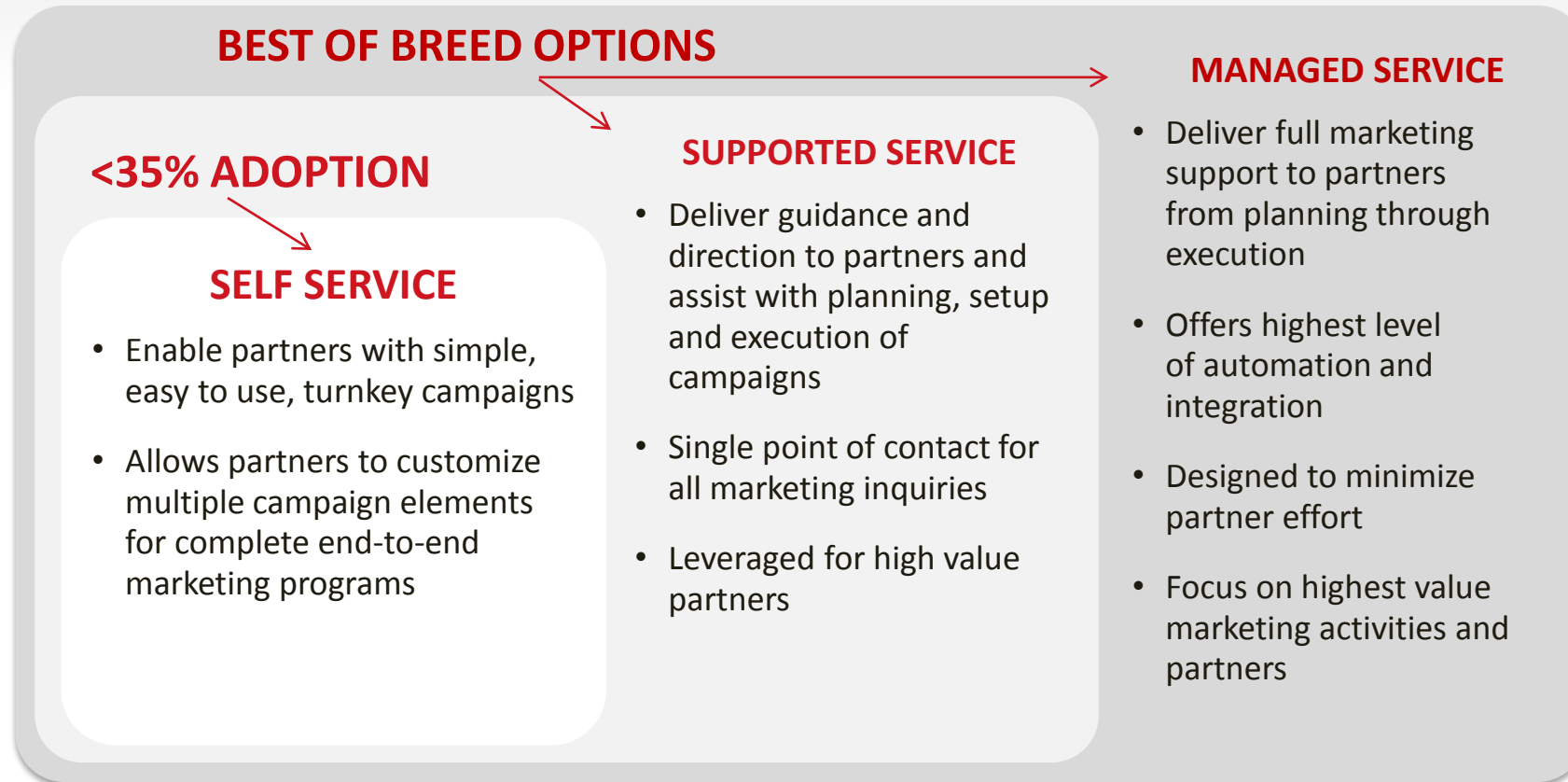
Partner Investments	IT Vendors	Distributors
1. Email/on-line mktg.	1. Web content syndication	1. Video production
2. Social media platform	2. Email/on-line mktg.	2. Marketing campaign mgmt.
3. Lead mgmt. & nurturing	3. Mktg. campaign mgmt.	3. Web content syndication

Q: Please tell us the method(s) by which you expect to gain access to these marketing automation tools.

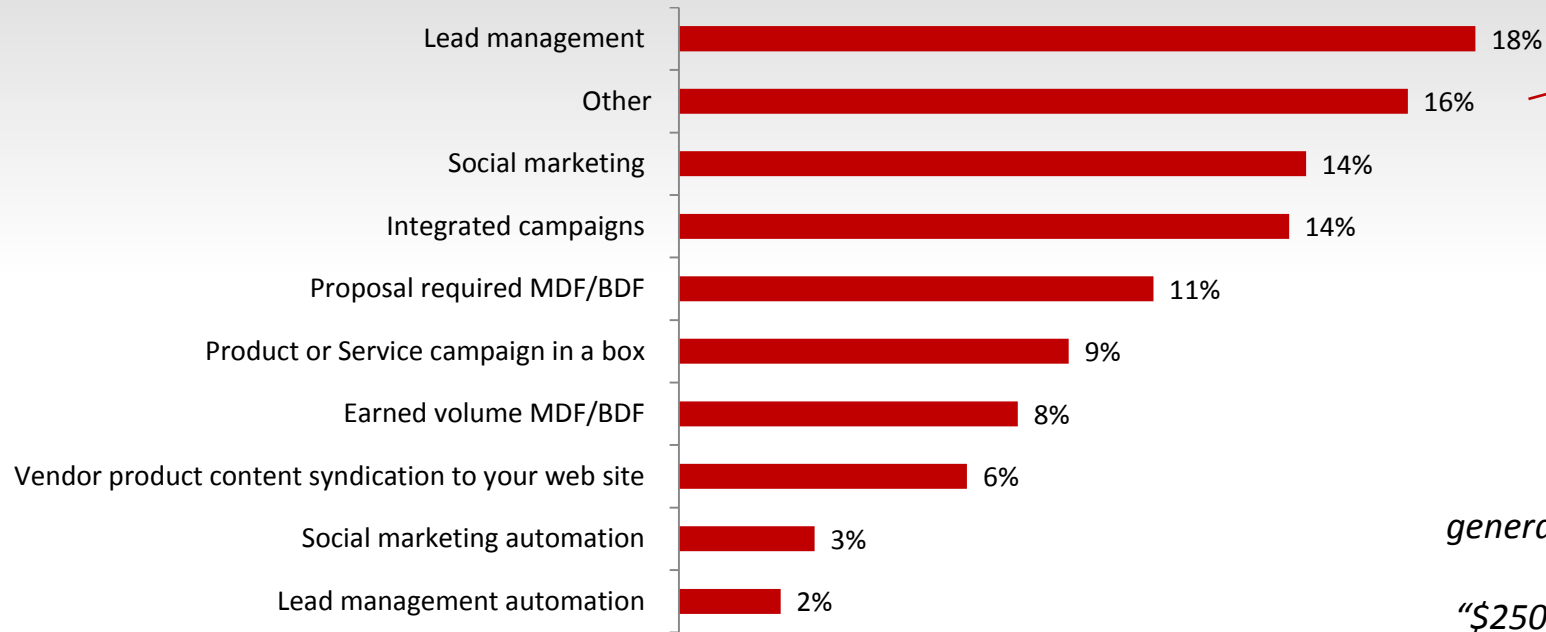
11.2 Self Service Tools Demonstrate A Less Than 35% Adoption Rate. Vendor Support Is Needed To Supplement The Typical Partners' Capabilities.

The Question

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



11.2 Best of Breed Partner Marketing is a Supported or Managed Service typically allocated to Strategic Partners



Write ins for Other:

- Joint Conferences
- Marketing Support
- Funded position
- Lunch and learn
- Tradeshow

“Web page optimization and lead generation training are the most valued.”

“\$2500 in MDF, not matched, requiring a 40 to 1 ROI. It happened simply across multiple product lines. Yes, it was proposal based. I reported back on a spreadsheet.” - provided by a major HW and SW vendor alliance

“Complete end to end support, funded through MDF, including mailings, website support (with content syndication) and twitter tie-in.”

“Integrated marketing automation solution with CRM to provide visibility to sales and letting them help provide lead scoring with aggressive tele-follow up by the vendor and distributor.”

11.2 Joint Marketing Inhibitors Range from Business Goal Mismatch to Lack of Willingness to Utilize Self Service Materials

- Small company, limited resources
- Not big enough
- We don't qualify for vendor co-op and campaigns

We are of Insignificant Size

- Lack of marketing department
- Lack of manpower
- Lack of funding, funding, funding
- Costs and time, time, time

Lack of Funds, Time & Staff

- Paperwork requirements
- Too complicated, logistics

Difficult to Use

- We segment the market differently
- We are too diversified in our offerings to focus on a specific product
- They sell products, we sell a service with those products

Business Goal Mismatch

Q28: What is your company's greatest barrier/inhibitor to joint marketing with your chosen technology vendors including service providers?

11.3 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*

11.1 – 11.3 Outline Your Program in a GIVE to GET Format

- Go back to worksheet 8 and pull the Ideal Partner profile.
- Is your program screening for this type of partner?
- Ensure your program design and recruitment presentation are directed at a partner who meets the profile.

WORKSHEET 11.1 – 11.3

Outline Your Program in a Give to Get Format
Partner Profile Screening Criteria (Refer to worksheet 8):

Remember to build a program to meet the needs of your Ideal partner profile and the benefits they value.


Call this out when you screen the partner.

They Give: **They Get:**

11.1 – 11.2 Program Commitments <u>Required</u>	11.1 – 11.3 Program <u>Benefits</u> (\$, vouchers, MDF, equipment, etc.)
Sales Education: _____	Sales Education: _____
Technical Education: _____	Technical Education: _____
Marketing: _____	Service Development Support: _____
Demo Sets: _____	Marketing: _____
Other: _____	Demo Sets: _____
	Coverage/CAM: _____
	Other: _____

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WORKSHEET 11.1 – 11.3



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

Partner Recruiting – Closing The Deal and Commit to On-board

Once a Channel Partner Agrees to Join Your Program,
the **Effectiveness and Simplicity** of your Sign-up Process is **Mission Critical**

Formal Application – Make It Easy!

- Make a simple checklist of all the paperwork to ensure you don't miss any details in the process
- Help them fill out the paperwork ... no matter how short or long it is

Authorization – Make It Fast!

- Provide a specific description of exactly who is involved in the approval process, what steps will be taken, and how long each stage of the process will take
- Notify the partner of progress throughout the process ... even if it's just a formality

Distribution Alignment – Make It Obvious!

- If it's necessary for partners to purchase through Distribution, make sure you tell them why ... in terms that add value for the Partner!
- If there's additional paperwork to be completed ... see the "Application" information above

Next Steps – Make It Urgent!

- No matter how compelling the reasons were to sign up, if you don't IMMEDIATELY follow up with action that leads to opportunity then "buyer's remorse" will undo the entire process
- Be specific – exactly what you'll do, when, why, and what's in it for the Partner

11.4 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

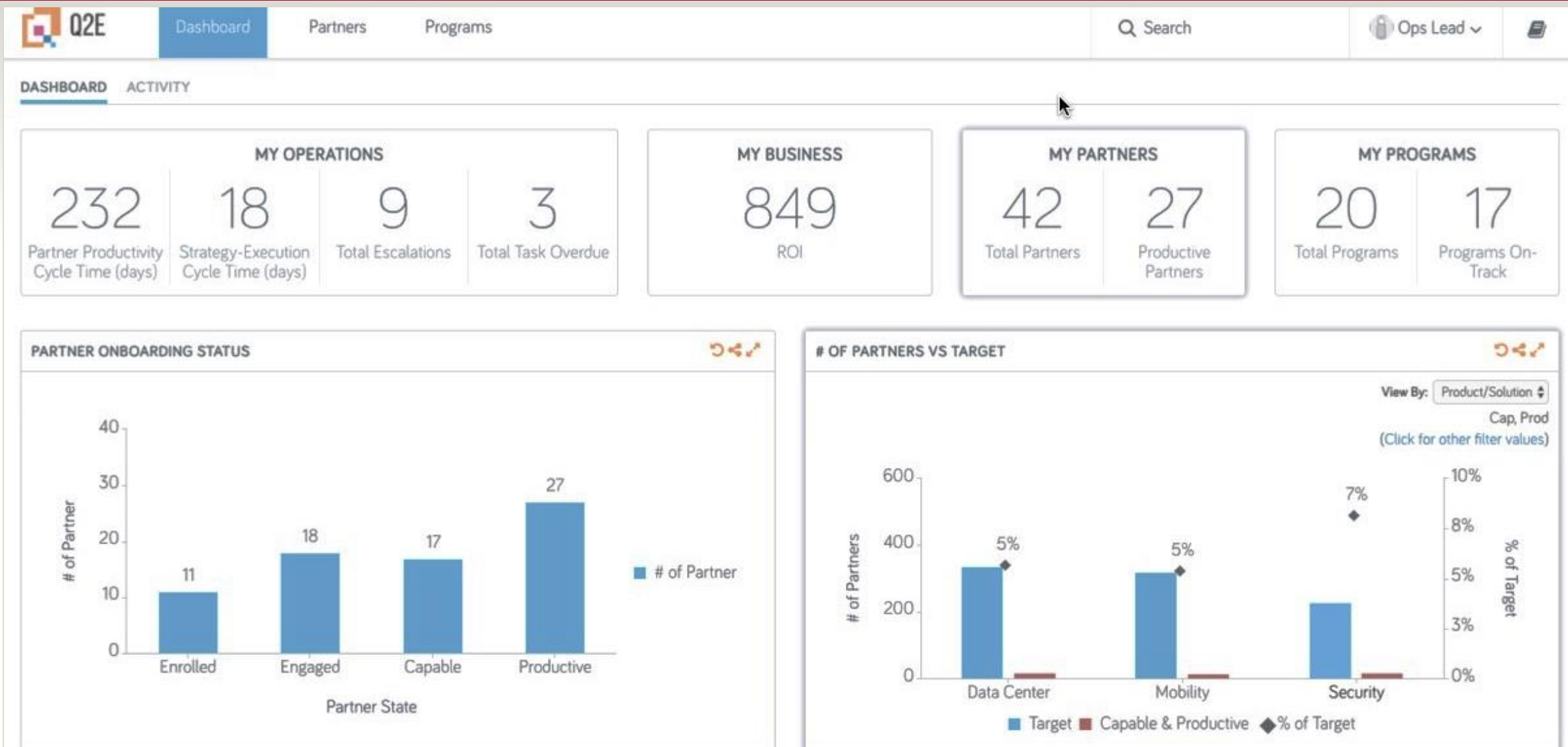


*Business Plan should be initiated no later than 12 months after recruitment for “Managed” Partners

11.4 Typical On-boarding Structure – Brand the Program



11.4 Sample On-boarding Dashboard – Brand the Program





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



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



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

11.5 Dashboard Measures of Success

	Q1	Q2	Q3	Q4
Partners On-boarded	8	20	28	40
Pipeline	\$3M	\$6M	\$9M	\$12M
Revenue	\$1.2M	\$3.1M	\$4.36	\$6.23

Activity	Goal	YTD	Notes
Partners Recruited; 60	60		
Active Partners (made it to Lift Off); 30	30		
Sales Training (2/partner)	60		
Pre-Sales Tech Training	30		
Marketing Training	30		
Operations Training	30		
Demo Unit	30		
Joint Business Plan	30		
MDF (\$14K/partner)	\$420K		
Marketing Activities (40/partner/year)	1200		
Joint Sales Calls (1/month/partner)	360		
Customer Wins	\$10M		

Monthly Dashboard Metrics

Track performance against plans:

- Capacity
- Education
- Marketing
- Revenue

In real life: your company culture and systems support typically dictate how elaborate or simple your tracking dashboard will be.

11.4 – 11.5 Ensure Success with On-boarding and Measures of Success

- With the decisions you made in worksheets **11.1**, **11.2** and **11.3** in your hand, organize as a team or divide and conquer to brainstorm your:
 - **on-boarding program and**
 - **measures of success**
- You are preparing for an internal Management meeting.



WORKSHEET 11.4 – 11.5

On-boarding & Measures of Success

11.4
On-boarding
Formulate
On-boarding Program

11.5
Measures of Success
Formulate the
Measures of Success

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WORKSHEET 11.4 – 11.5

The worksheet contains two main sections for notes. The first section, labeled '11.4 On-boarding', includes the instruction 'Formulate On-boarding Program' followed by seven horizontal lines for writing. The second section, labeled '11.5 Measures of Success', includes the instruction 'Formulate the Measures of Success' followed by seven horizontal lines for writing. The Channel Navigator logo is located in the top right corner, and the ChannelMasters logo is at the bottom left of the worksheet area. A vertical red bar on the left side of the worksheet contains the text 'WORKSHEET 11.4 – 11.5'.

**IN
REAL
LIFE**

Role Based versus Specific Track Program Structures



Choose a relationship that meets your goals.

Resell & Consult

Citrix Solution Advisor - Earn the trust of your customers as an expert in solutions to enable mobile workstyles, and earn incentives recognizing your commitment and success. [Learn more >](#)

Citrix System Integrator - Help enterprise customers architect, plan and deliver innovative business solutions leveraging the Citrix portfolio of products. [Learn more >](#)

Independent Software Vendor - Build Citrix technology into your own software solutions to deliver best-in-class features, functionality, performance and ROI. [Learn more >](#)

Host Solutions

Citrix Service Provider - Provide Citrix virtualization solutions, including hosted desktops and applications, on a rental, subscription or services basis. [Learn more >](#)

Refer Leads

SaaS Advisor - Earn monetary rewards when you refer Citrix SaaS products that convert to sales. [Learn more >](#)

Showcase Compatible Solutions

Citrix Ready - Make it easy for customers to find your product, solution or service after testing and verifying its Citrix-compatibility. [Learn more >](#)

Manage & Support Partners

Distributor - Provide sales, order fulfillment and support for Citrix Solution Providers and resellers. [Learn more >](#)

Offer Training

Citrix Authorized Learning Center - Help customers increase ROI and enhance IT productivity with training and certification on Citrix products. [Learn more >](#)



Ways to Partner with SAP

SAP Channel Partners

Join the value-added resellers that build, service, and sell SAP solutions to customers of all sizes including the rapidly expanding SME market.

[Learn more >](#)

SAP Authorized Resellers

Resell and implement our leading analytic, database & technology, and mobile solutions – to expand your market reach and boost your revenue.

[Learn more >](#)

SAP Extended Business Member Program

Align with an SAP channel partner through our extended business program to access tools that help you sell, implement, or develop SAP solutions.

[Learn more >](#)

SAP Crystal Solutions Resellers

Grow your revenue by reselling SAP Crystal solutions. To obtain authorization, contact your local SAP Crystal Solutions distributor.

[Learn more >](#)

SAP OEM Partners

Embed and integrate SAP solutions and platforms into your own offerings to expand your market potential and provide greater customer value.

[Learn more >](#)

SAP PartnerEdge for Application Development

The tools, benefits, and support to help you quickly build, market, and sell SAP platform-based apps through the SAP Store.

[Learn more >](#)

Partner Managed Cloud Subscription Delivery Partner

Give customers the flexibility, rapid time to value, and pay-as-you-go economics of the cloud – together with fully managed, enterprise-class SAP solutions.

[Learn more >](#)

SAP Outsourcing Operations Partners

Offer customers certified operations and maintenance services that provide high-quality, sustainable, and cost-effective operation of their SAP solutions. This program is by-invitation only.

[Learn more >](#)

SAP Services Partners

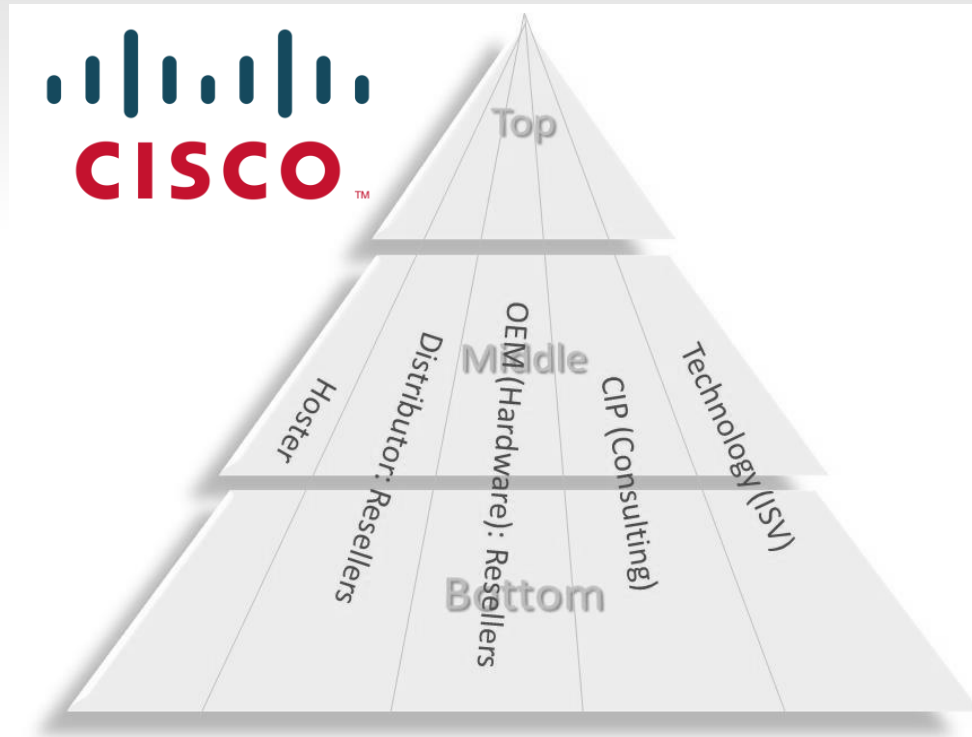
Work with SAP sales teams to provide consulting services to our customers – helping them design, implement, and integrate our solutions.

[Learn more >](#)

SAP Language Services Partners

Offer customer-specific language consultation support and translation services – to meet the needs of SAP customers in today's global market.

[Learn more >](#)



Driving Change

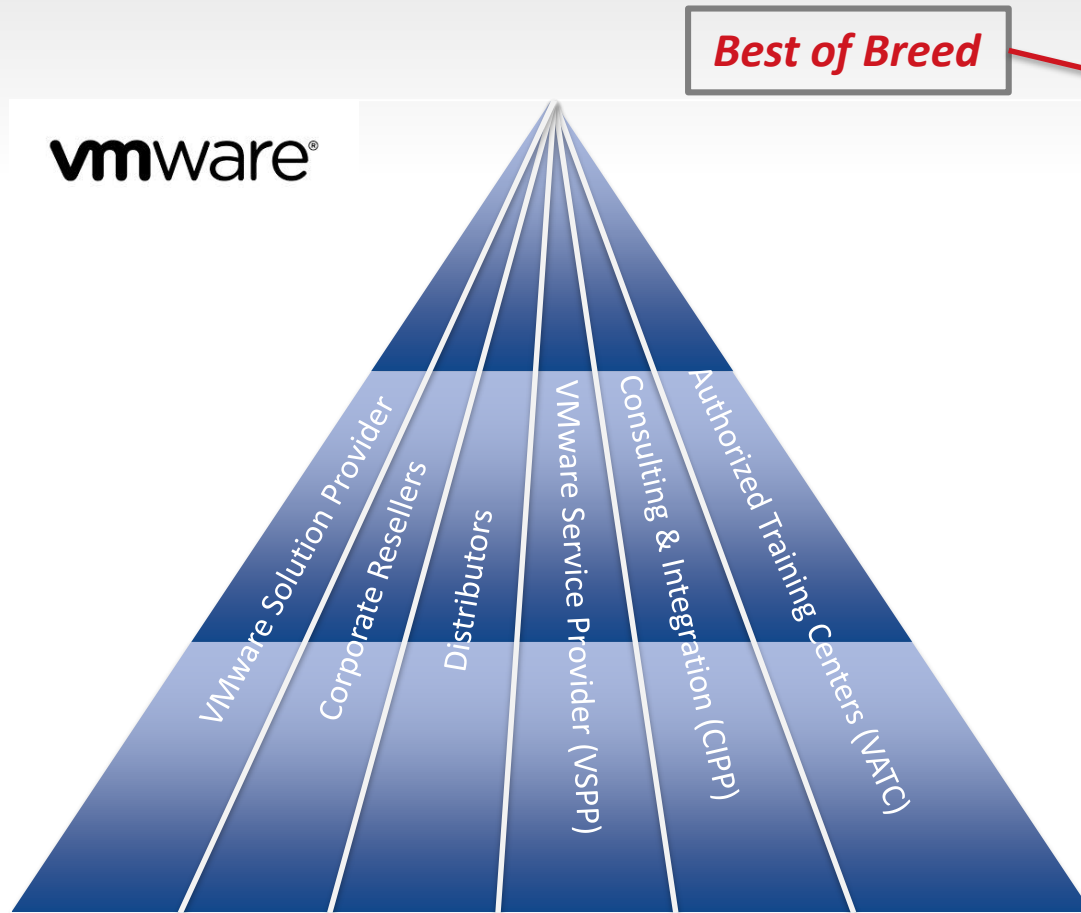
Driving Cloud Adoption by Role:

- ✓ Cloud Builder – designed for those building clouds (private and public)
- ✓ Cloud Provider – designed for those who want to take an offering to the public
- ✓ Cloud and Managed Services Reseller – designed to connect the traditional Cisco reseller to a public cloud provider

2014 Cisco enters the Public Cloud Services Space, competes with AWS, VMware, etc.

Under the new program, partners at the Gold level – still the highest possible tier – need to be actively selling a minimum of four Cisco cloud or managed services offerings, and can only meet that requirement by selling at least one cloud service and at least one managed service.

Partner Program Trend Examples: VMware



VMware Best Practices focuses on helping partners build services and service revenue quickly:



Bundled kit of services wrapped around VMware Software to allow partners the ability to streamline and simplify many repetitive, time-intensive tasks performed in virtualization projects.

SKUd solution from distributors or available direct via download from VMware for higher level partners.

Service Kits also available to partners

Kits that wrap up VMware IP to provide partners with resources and tools to sell services around VMware products.

Includes:

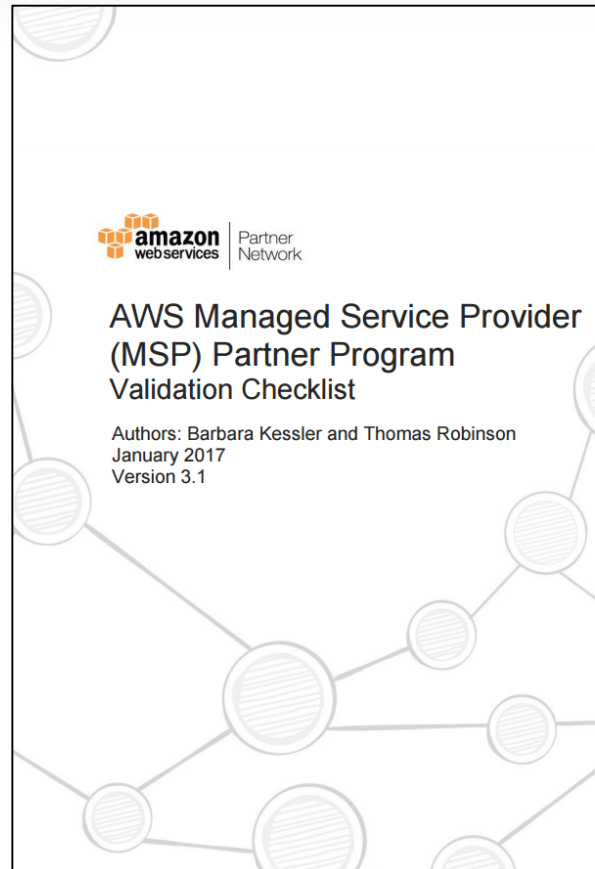
- Checklists
- Best practices
- Spreadsheets

Partner Program Examples: Amazon



Emerging vendors are NOT encumbered by the past.

- ✓ Focused on WHY they need partners and offering targeted programs
- ✓ Focused on specific business models that make sense for their product offerings
- ✓ Building programs that meet their needs sometimes contradicting traditional behavior
 - ✓ i.e. AWS Managed Services Program
 - ✓ Requires validation by 3rd party audit firm
 - ✓ \$3,000 USD audit fee + related travel expenses if applicable
 - ✓ Represented as Audited Managed Services Partners on AWS website/marketplace
 - ✓ According to AWS Partner finder = 93 MSP partners



		Subtract if Does Not Meet Capability	Add if Does Meet Capability	Partner Self-Assessment	Auditor Validation
1.0 Business Health					
1.1 Financial Health	<p>Partner regularly assesses financial health of their business including Altman's Z-Score, Dun and Bradstreet (D&B) Paydex Score, D&B Rating, D&B Financial Stress Score, D&B Supplier Evaluation Risk Rating, or equivalent.</p> <p>AWS MSPs are trusted advisors to customers of all sizes, helping companies make decisions based on their overall goals. In undertaking customer engagements, AWS MSPs take the lead in ensuring customer data is protected and AWS best practices are followed in all areas including the planning and design, migration, and new solution development. The expectation is that these solutions and workloads will be monitored and maintained on an ongoing basis, with the AWS MSP providing regular touch points with the customer with continual recommendations on ways to increase efficiencies. Due to the importance of the role of the AWS MSP, Partners must also show that they have viable businesses to earn and maintain customer trust.</p> <p>Acceptable evidence includes D&B Company Credit Reports (or equivalent for Partner's region) and proof that Partner is assessing and creating plans when risks are identified. Public securities filings for the most recent period are sufficient evidence for publicly traded companies.</p> <p>Articles in the press about the company, analyst reports, and/or statements made by the company on their website will not be considered sufficient evidence to meet this requirement.</p> <p>Any mergers, acquisitions, or divestitures in-process that materially impact a company's ability to deliver AWS Cloud managed services must be disclosed at the time of the audit.</p>	-200	0		
1.2 Financial Planning and Reporting	<p>Partner has processes in place for financial planning, including forecasting, budgeting, and review of financial metrics and reports.</p> <p>Evidence must be in the form of records of financial planning and reviews, and records of collection and review of financial metrics. Public securities filings for the most recent period are sufficient evidence for publicly traded companies.</p>	-200	0		

The background features a complex geometric pattern of overlapping triangles in various shades of red and white. A prominent white diagonal band runs from the top-left towards the bottom-right, creating a sense of movement and depth. The text is centered within this white band.

**Build the Partner Program
& On-boarding Plan
Phase 2**

Use Data and Decisions from Module 1 Decisions to Outline Your Program

WORKSHEET 1-7

Complete the P

1. Target Market
2. Average Sellin
3. Average Sellin
4. Describe the C
5. Describe the T
6. For What Use
7. What are the F

WORKSHEET 8

Complete the Sample

Red = Navigator supplied Ideal P

Annual Revenues: > _____

HW Resale \$ _____ %

SW Resale \$ _____ %

Project Professional Serv

Recurring Managed Servi

- Public Cloud
- Partner Own
- Customer Own

Maintenance _____ %

Annual Revenue Growth: _____

Business Model: (VAR, M

Target Market: (Enterpris

Verticals: _____

Public Cloud Service Prov

Primary "lead with" offerin

Marketing staff & commitr

Likelihood for technical, s

Ability to cross-sell our en

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WORKSHEET 10

Circle Your Budget Spend Priorities for Your Ideal Partner

All are important, RED indicates Partner Priorities

Product Focused Resellers	Solutions Focused VARs	Services Led VARs & SI's	MSPs & Service Providers
Predictable product flow	Standards-based product	Reference architectures	Deep technical relationship
Competitive SRP pricing & Rebates	Technical training	Sales influence – recognize/reward	Classroom and lab based training
Strong brand presence	Tech. architectures and tools	Clear rules of engagement (w/vendor and other partners)	Utility-based licensing models
Clear, stable front-end margins	Certification & specialization status	Use-cases and references	Expedited support
On-line sales & technical training	Deeper technical support	Field sales teaming model	Creative financing
Deal protection/reg.	Performance incentives/rebate	Prof. Services mentoring & tools	P2P collaboration program visibility
Affordable training	Deal protection/reg.		Compensation neutrality for vendor field teams
Access to Channel rep	Co-marketing support & MDF		
Minimal channel conflict			
Simplicity & affordability	Tech. depth & differentiation	Services-attach & influence	Solid technology Financing/licensing

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WORKSHEET 11.1 – 11.3

Outline Your Program in a Give to Get Format

Partner Profile Screening Criteria (Refer to worksheet 8):

Remember to build a program to meet the needs of your Ideal partner profile and the benefits they value.

Call this out when you screen the partner.

They Give: **They Get:**

11.1 – 11.2 Program Commitments <i>Required</i>	11.1 – 11.3 Program <i>Benefits</i> (\$, vouchers, MDF, equipment, etc.)
Sales Education: _____	Sales Education: _____
Technical Education: _____	Technical Education: _____
Marketing: _____	Service Development Support: _____
Demo Sets: _____	Marketing: _____
Other: _____	Demo Sets: _____
	Coverage/CAM: _____
	Other: _____

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SAMPLE

Agenda:

Meeting Goal:

- Goal of today's meeting is to update management on our progress before recruitment of partners commences.
- This meeting is a success if...management understands the partner profile, partner program, program elements, on-boarding program how they will support your revenue goal and measure of success

\$2M Partner Program Budget Background



Capacity to Program Revenue Goal

- # of partners to recruit
- Typical Partner Productivity
- First year revenue goal

Budget Allocations

- \$ amount by category amounts

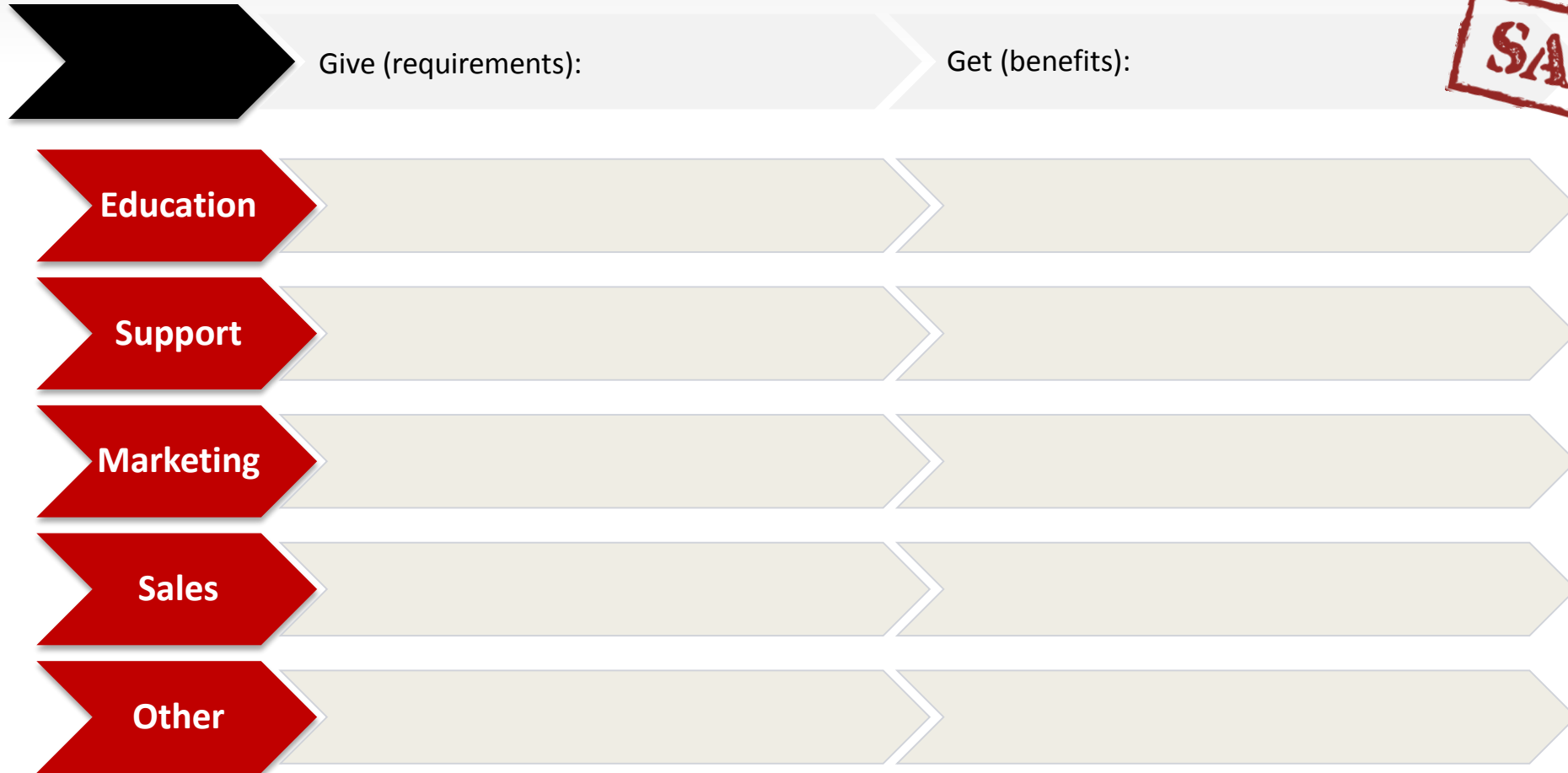
Background...in prior meetings we were granted a \$2M budget, this is how we will use the budget to achieve the revenue goal

- Capacity Plan
- Links to Revenue Goal

Program Elements

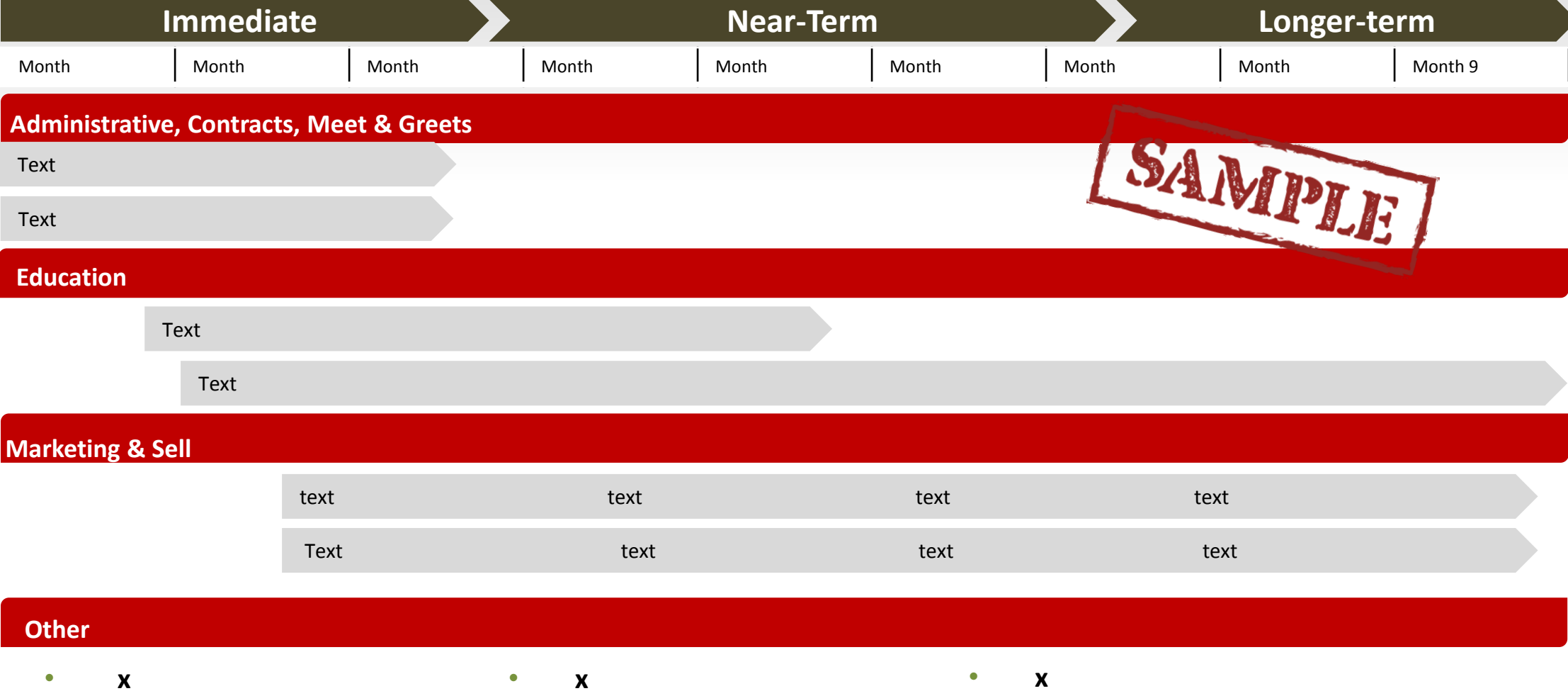
Ideal Partner Profile: _____

*Highlight the benefits that matter,
we likely don't have the time
to build an entire program.*



SAMPLE

On-boarding Timeline – Brand it



Measures of Success

	Q1	Q2	Q3	Q4
Partners On-boarded	8	20	28	40
Pipeline	\$3M	\$6M	\$9M	\$12M
Revenue	\$1.2M	\$3.1M	\$4.36	\$6.23

**Determine what you will
Measure and Track!!**

SAMPLE

Activity	Goal	YTD	Notes
Partners Recruited; 60	60		
Active Partners (made it to Lift Off); 30	30		
Sales Training (2/partner)	60		
Pre-Sales Tech Training	30		
Marketing Training	30		
Operations Training	30		
Demo Unit	30		
Joint Business Plan	30		
MDF (\$14K/partner)	\$420K		
Marketing Activities (40/partner/year)	1200		
Joint Sales Calls (1/month/partner)	360		
Customer Wins	\$10M		

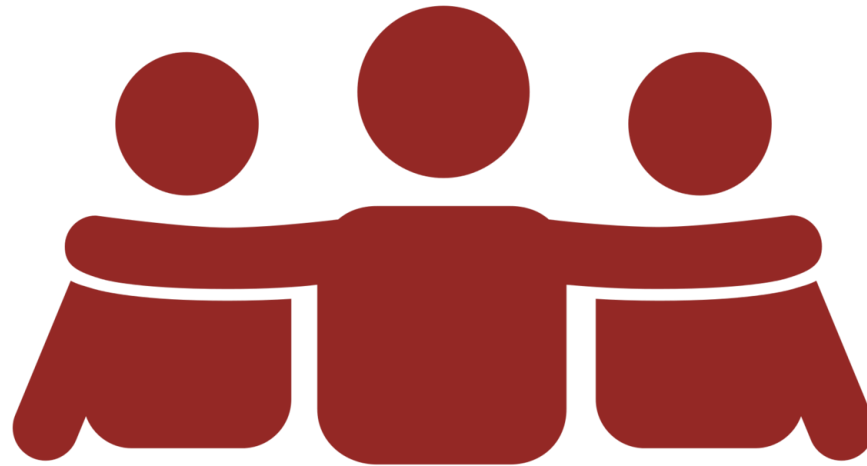
SAMPLE

1. Your agreement

2. Next steps

3. TBD

- ❖ On-boarding, in whose organization does this responsibility lie?
 - Which partners get TLC?
- ❖ Commodity product vs. complex product enablement plans?
- ❖ Templates, processes, branded?



The background features a complex geometric pattern of overlapping triangles in various shades of red and white. A prominent white diagonal band runs from the top right towards the bottom left, creating a sense of movement and depth. The text is centered within this white band.

**Recruit a Partner
to the Program
Phase 3**