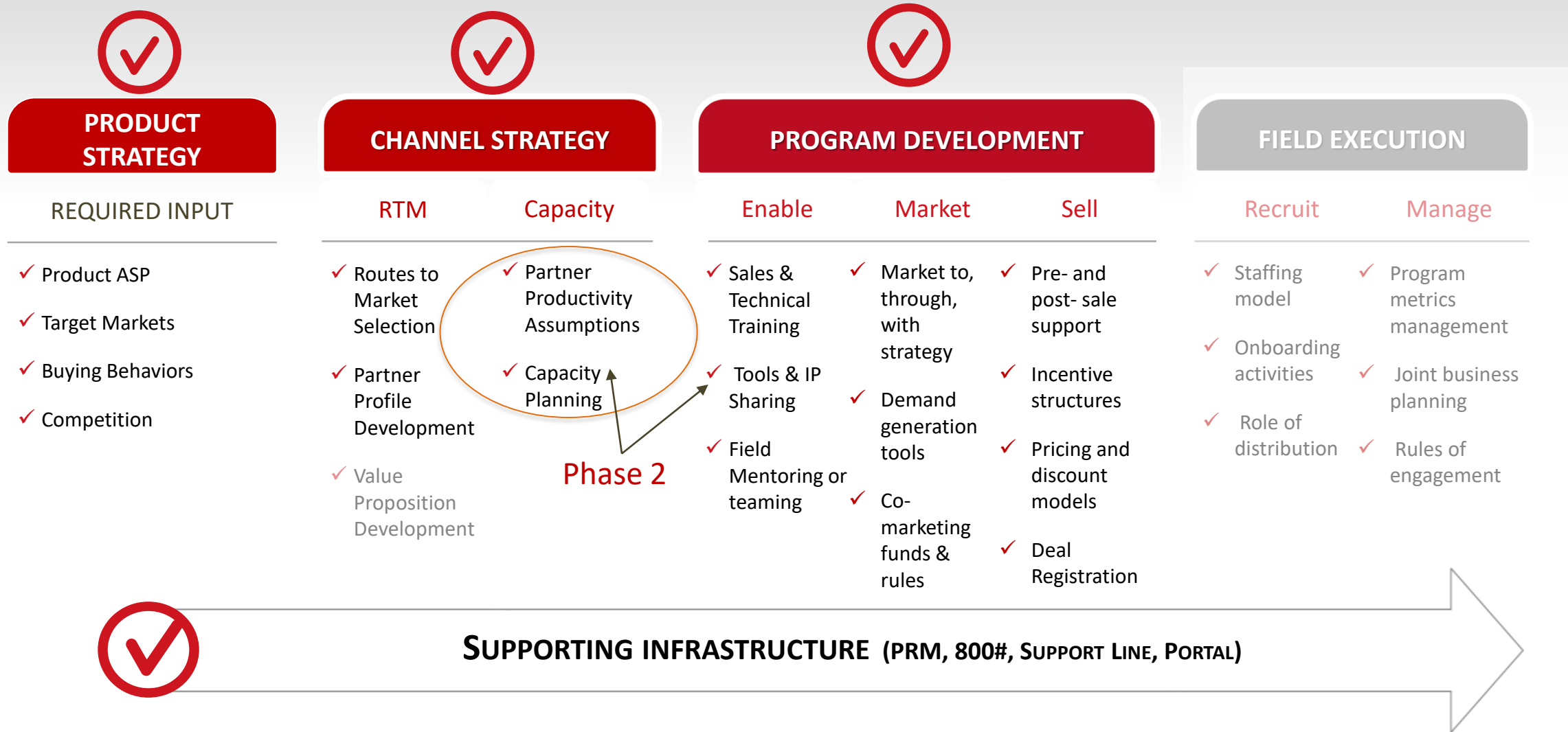


PHASE 2


Build the Partner Program & On-boarding Plan

Finalize Strategy Based on Product Management Plans



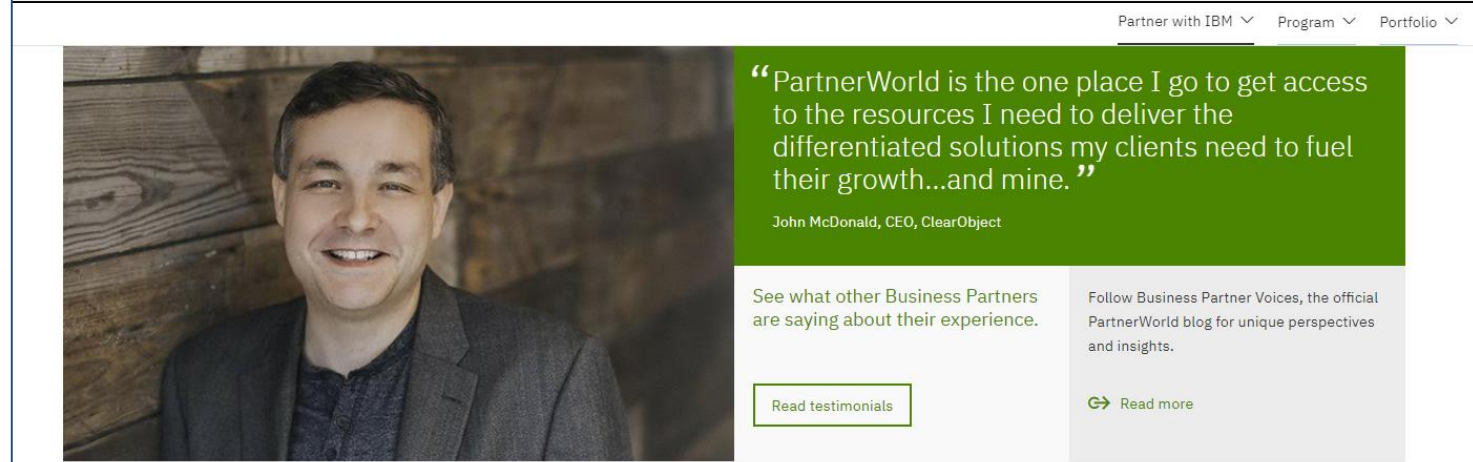
**IN
REAL
LIFE**

Role Based versus Specific Track Program Structures



Choose a relationship that meets your goals.

Resell & Consult	<p>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</p> <p>Citrix System Integrator - Help enterprise customers architect, plan and deliver innovative business solutions leveraging the Citrix portfolio of products. Learn more</p> <p>Independent Software Vendor - Build Citrix technology into your own software solutions to deliver best-in-class features, functionality, performance and ROI. Learn more</p>
Host Solutions	<p>Citrix Service Provider - Provide Citrix virtualization solutions, including hosted desktops and applications, on a rental, subscription or services basis. Learn more</p>
Refer Leads	<p>SaaS Advisor - Earn monetary rewards when you refer Citrix SaaS products that convert to sales. Learn more</p>
Showcase Compatible Solutions	<p>Citrix Ready - Make it easy for customers to find your product, solution or service after testing and verifying its Citrix-compatibility. Learn more</p>
Manage & Support Partners	<p>Distributor - Provide sales, order fulfillment and support for Citrix Solution Providers and resellers. Learn more</p>
Offer Training	<p>Citrix Authorized Learning Center - Help customers increase ROI and enhance IT productivity with training and certification on Citrix products. Learn more</p>



Partner with IBM | Program | Portfolio




“PartnerWorld is the one place I go to get access to the resources I need to deliver the differentiated solutions my clients need to fuel their growth...and mine.”

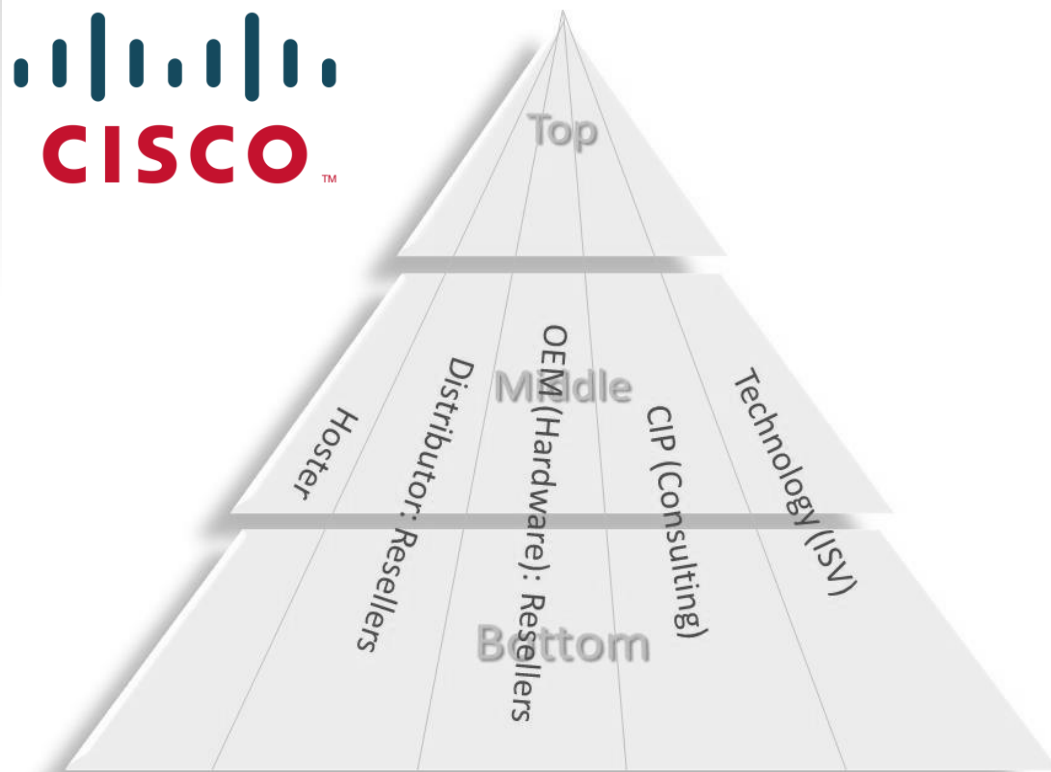
John McDonald, CEO, ClearObject

See what other Business Partners are saying about their experience. [Read testimonials](#)

Follow Business Partner Voices, the official PartnerWorld blog for unique perspectives and insights. [Read more](#)

The IBM PartnerWorld program provides multiple, relevant paths to a successful partnership.

 <p>Do you Resell?</p> <p>Design a comprehensive, integrated solution from our vast product portfolio.</p> <p>Learn more about the Resell model</p>	 <p>Do you Develop?</p> <p>Explore, develop and test on IBM platforms with wide-ranging capabilities.</p> <p>Learn more about the Development model</p>	 <p>Do you Implement?</p> <p>Implement and deploy your IBM based solutions with our reliable infrastructures.</p> <p>Learn more about the Implementation model</p>	<p>Don't see an approach that works your way? There are other paths you can take to partner with IBM.</p> <p>Learn more</p>
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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.

Cloud & Managed Service Providers: Cisco ConnectWise Unite

- Customized managed services platform to help Cisco partners efficiently deliver managed services to the fast growing SMB market
- Manage Amazon Web Services and Cisco Platforms from one place; Cisco products include Meraki, Spark, Umbrella, and Stealthwatch Cloud
- Currently in pilot mode; Subscription costs \$10/user/month after free trial

Centralize Client Applications Management

Manage Amazon Web Services, and Cisco Platforms from one place. Reduce the complexity and time spent managing user accounts. With ConnectWise Unite, you can efficiently manage everything from one place, and perform tasks with ease.

[Download your Cloud Service Provider eBook >>](#)



Join the pilot program free through December 31, 2017 to experience:



Single-Invoice Billing

Fully automated, aggregated billing and one invoice for each customer.



See Everything that Matters

Increased visibility into your AWS and Cisco solutions.



Proactive Instead of Reactive

Proactive monitoring that ensures you stay as productive as possible.



Built-In CRM

Customer relationship management and basic ticketing capabilities.



Simpler, Smoother Solutions

Reduced complexity, time, and cost for managing cloud solutions



Cisco Invests in Intellectual Property to Help Partners Build Services Practices

“Common eligibility structure and investment path ...”



Platform to Access Cisco Services Portfolio



All automated – Partner Self-Service Tool

Partner Program Examples: Amazon and the Balance of Power may equate to Fees



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 = 114 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		

As of 2017

What we offer

✓ **Offerings**



Internet of Things Infrastructure

Create a flexible and powerful Internet of Things ecosystem, with analytics enabled at the edge, datacenter and cloud.



Internet of Things Analytics

Drive deeper, more accurate insights for analytics-driven action with everywhere analytics.



Internet of Things Security

Put security first to safely deploy IoT initiatives and achieve functional integrity and data security.



Internet of Things Industries

Optimize operations and gain competitive advantage with an Internet of Things solution targeted for your industry.

Smart Manufacturing



✓ **Roles/Biz Models**

Focused on Commercial and Industrial IoT solutions

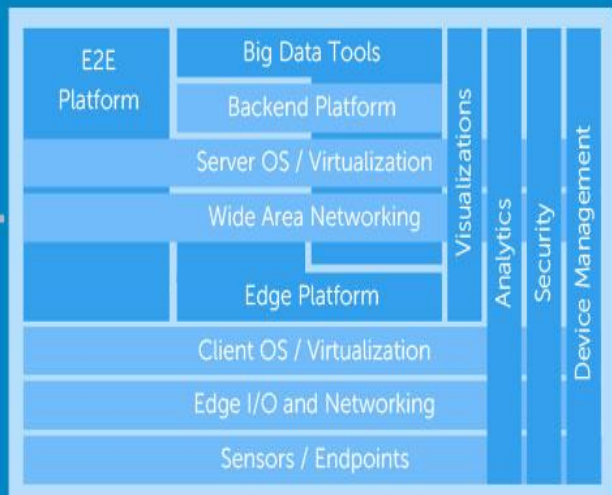
✓ **Verticals & Use Cases**

Verticals	Use Cases
Energy	Factory optimization
Manufacturing	Predictive maintenance
Transportation & Logistics	Automated process/QC
Communications	Smart infrastructure
Natural Resources	Smart metering & energy mgt
Healthcare	Fleet management
Retail & Hospitality	Security & access control
	Remote asset management
	Supply chain mgt & logistics
	Compliance & documentation

Dell IoT Infrastructure

Technology Partners

(ISVs, IHVs, OSVs)



Services Partners

(System Integrators, Contractors, Developers)

- Last Mile Delivery
- Solution Support
- System Integration
- Deployment
- Project Design
- Procuring Accessory

In Short

- ✓ **Offerings**
- ✓ **Roles/Biz Models**
- ✓ **Verticals & Use Cases**
- ✓ **Call to Action**

Technology Provider Benefits & Requirements

Feature	Registered	Associate	Executive
Potential for joint case studies	○	○	○
Access to private Partner Portal resources	○	○	○
Authorized use of the Dell IoT Solutions Partner logo	○	○	○
Listing on Find a Partner page on delliotpartners.com	○	○	○
Ability to publish PR about program participation	-	○	○
Potential for joint marketing, events, co-operative marketing funds	-	○	○
Potential to be recommended by Dell to customers and other partners	-	○	○
Access to Dell's IoT labs	-	○	○
Deeper engagement with Dell Partner Program Team, Marketing, Engineering, CTO and Sales	-	-	○

Service Provider Benefits & Requirements

Feature	Gold	Platinum	Titanium
Potential for joint case studies	○	○	○
Structured contact with Dell Partner Program Team	-	○	○
Access to partner portal resources	-	○	○
Opportunity to collaborate with other partners within IoT Partner Program	-	○	○
Listing on Find a Partner page on delliotpartners.com	-	○	○
Access to Dell's Global Solutions Centers & IoT Labs	-	○	○

✓ Call to Action

How to Enroll – Next Steps

- Submit a short application using [Contact Us](#) form
- Denote classification as Technology or Services
- Include a brief description of your offering.
- Dell will determine if you qualify for enrollment based on the requirements outlined in the [Program Guide](#)
- Dell will provide a link to our detailed application form to capture more information about your company and offering.
- Upon final approval, signed NDA will be **required**
- Technology Partners will need to complete additional qualification testing and accept the Technology Partner program agreement
- Services Providers will be provided a separate agreement to sign.
- Upon completion of all requirements partner will be assigned an initial program tier
- Partner will be listed on the [Find a Partner](#) page
- Partner will gain access to a private portal and resources.

Partner Management Lifecycle


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?*

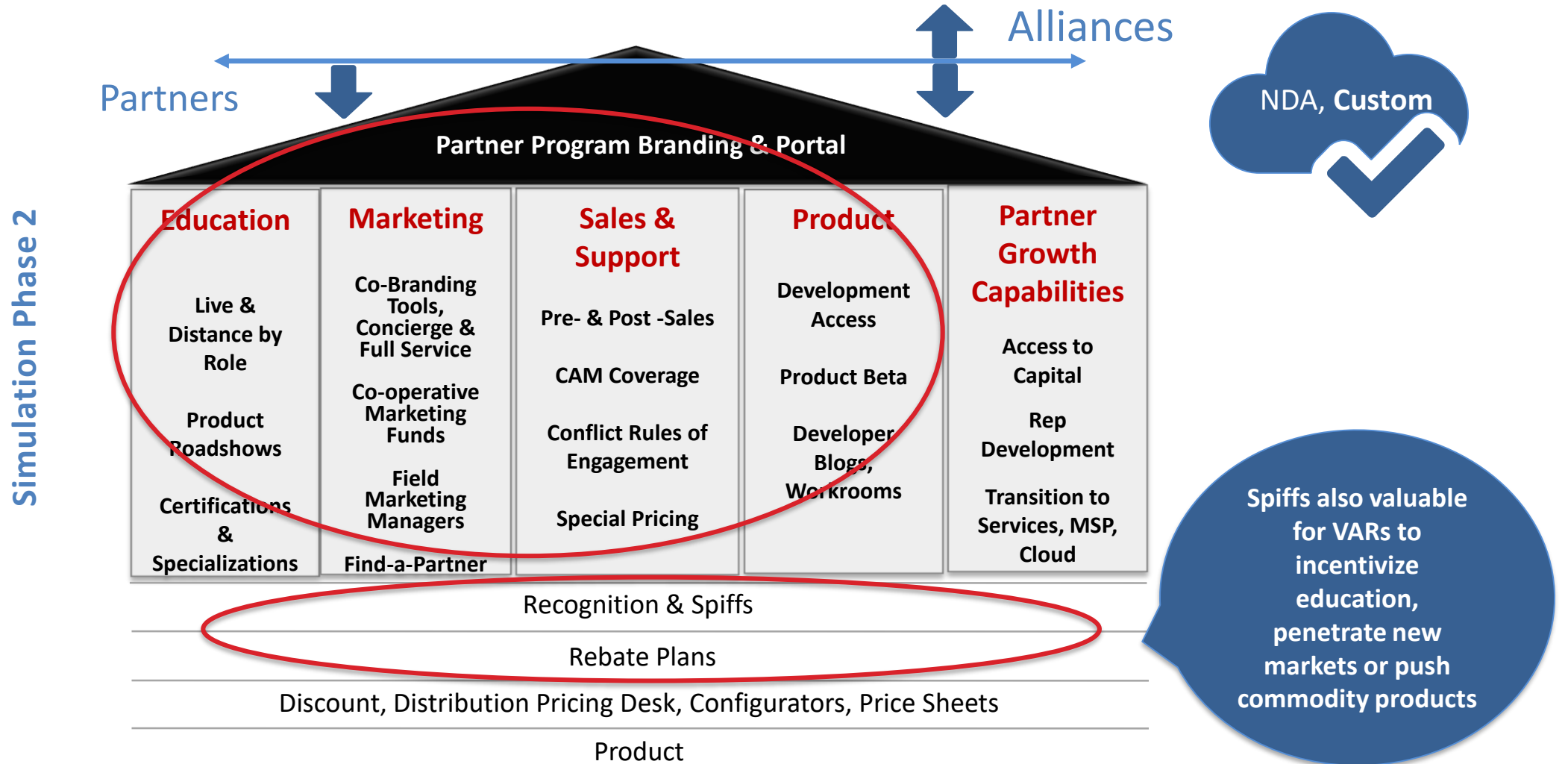
*Each discipline must be adapted to partner types
(model / effectiveness / etc.)
as well as relationship type & coverage model*

You've Allocated Budget.....

A close-up photograph of a person's hands writing on a document. The person is wearing a light blue button-down shirt. They are holding a black and silver pen in their right hand, writing on a white sheet of paper. Their left hand is resting on the paper. The background is blurred, showing what appears to be a desk or office environment.

Now Build Out the Program and On-Boarding Capabilities

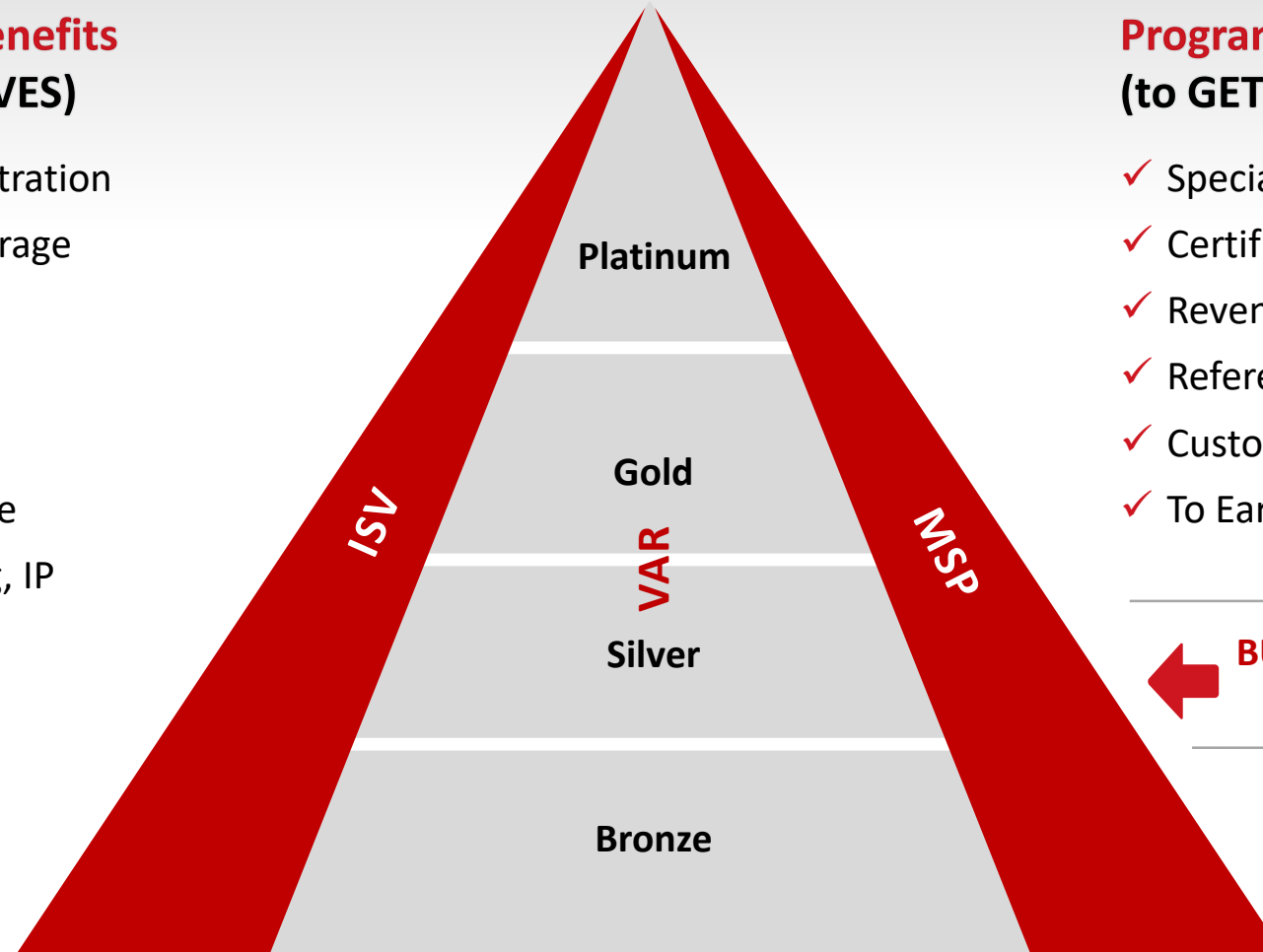
Sample Partner Program Benefits (Typically developed and differ by business model/track)



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

Program Benefits (Vendor GIVES)

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



Program Requirements (to GET from Partner)

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

← BUSINESS MODEL OR ROLE
BASED TRACKS

Deal Registration: Rightly or wrongly...vendors have taught partners to expect it...

Before Building Deal Registration... Be Sure to Understand the Goals of the Program

Protect partners from Direct Sales

Protect partners from those who sell on price rather than value

Goal also determines if reg. benefit is:

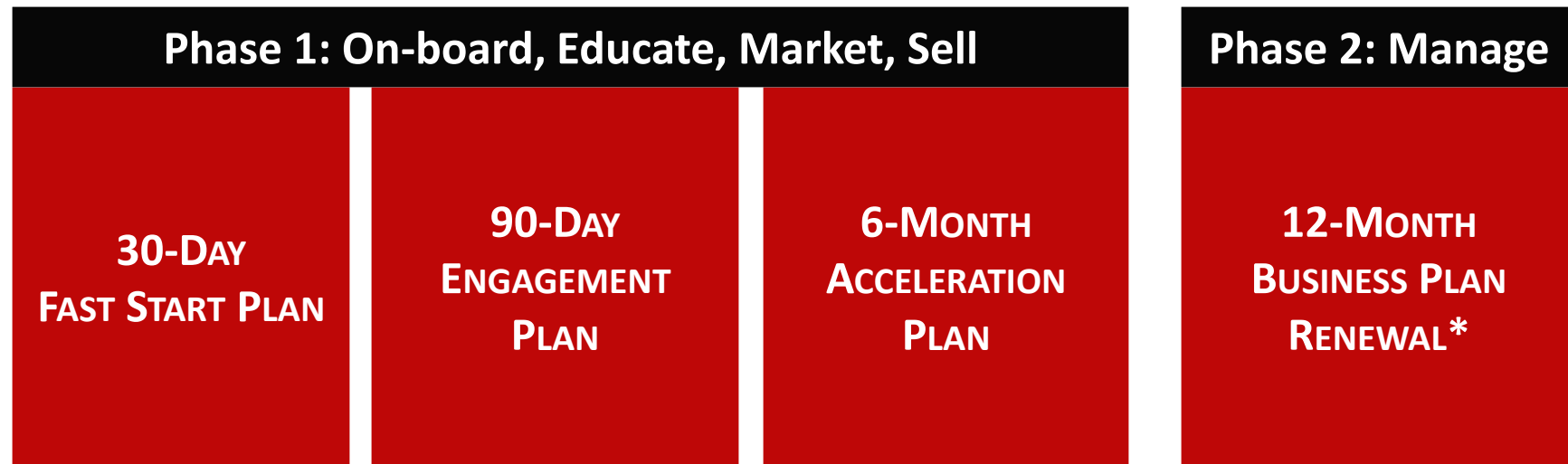
- Up front discount
- Back end rebate or
- Simply the right to fulfill the deal

Offer view to pipeline, incremental revenue

Incentivize desired behavior (e.g. SMB revenue, new customer logos closed, etc.) by offering additional discount

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

Typical On-boarding Structure – Brand the Program

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

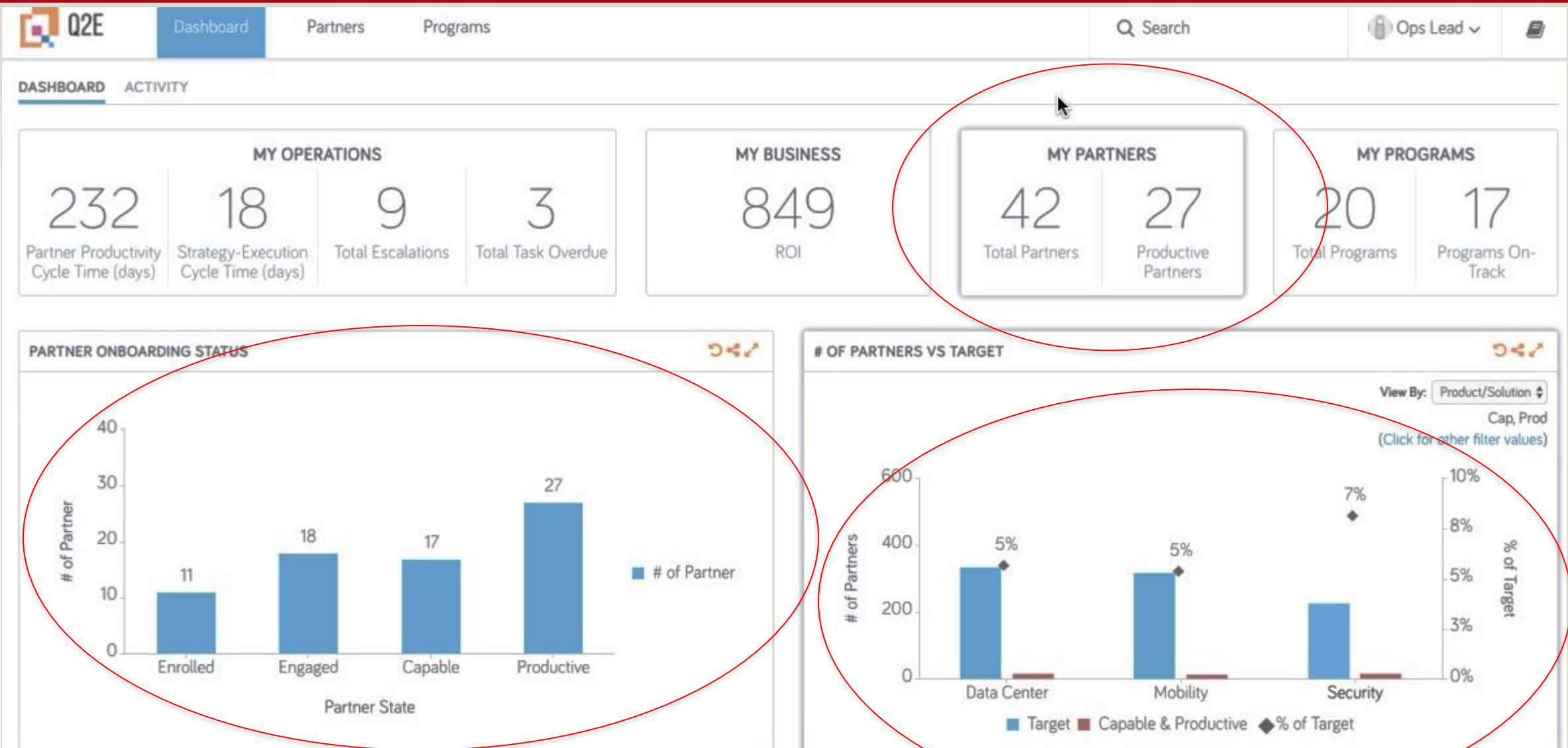
6-Month Acceleration Plan

- ✓ 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

Sample On-boarding Dashboard – Track Progress Through Phases



30 Days

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



90 Days

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

180 Days

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

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.

As you build your program, you need to know if you are building for thousands or for 100.

Additionally, part of management review will include an indication of how many partners you'll recruit to achieve \$5M in revenue.

Capacity Planning Helps Identify How Many Partners are Required for Recruitment

INFO REQUIRED	
Product Average Selling Price (ASP) @ Net Revenue	\$10,000
Number of Deals Average Partner Can Sell / Year	10 / Year
My Annual Quota	\$1,000,000
Recruitment Failure Rate: <i>(Historically what % of partners recruited do not achieve AT LEAST 80% of the # of deals the Average Partner sells per year?)</i>	30%

CALCULATIONS	
<p>Average Partner Productivity = Product average selling price (ASP) * number of deals partner can sell/year</p>	<p>\$100,000</p> <hr/>
<p>Number of Partners Required = Quota / average partner productivity / year (round up)</p>	<p>10</p> <hr/>
<p>Number of Partners Likely to Fail = Recruitment failure rate * number of partners required (round up)</p>	<p>3</p> <hr/>
<p>Final Number of Partners to Recruit = Number of partners required + number of partners likely to fail (round up)</p>	<p>13</p> <hr/>

In this example, all numbers are net revenue to the vendor.

Product Revenue & Service Attach Rates from the Navigator



NOTE: BETA FEEDBACK INDICATES THE \$50K ON PREMISE SOLUTION IS TYPICALLY SOLD ONLY INTO THE ENTERPRISE

Product Resale Available at 25% Discount	CloudOne on Premise
MacroSoft List Price	\$50,000

- Average Sales Price (ASP) of the Solution
- Partner Services assumptions

Your Services Opportunity	CloudOne on Premise	CloudOne as a Service
Pre-sales consulting, billed as a one time charge:	\$7,500	\$4,500
Implementation services, billed as a one time charge:	\$12,500	\$9,000
Additional Managed Services:	~ \$550 Per month / per system	~ \$550 Per month / per system

As a Service Monthly	Basic Service	Total Contract Value @ 36 mos	Pre-/Post-sale Services
SMB, Mid-market or Dept. Enterprise	\$1,000	\$36,000	\$9,000/Implementation \$550/month managed services

Capacity Planning Worksheet....Complete as a Team

FOR SIMULATION EASE ONLY: ASSUME ALL AS A SERVICE DEALS ARE SOLD IN JUNE

	ASP (for MRR use TCV)	Typical # Sold /Year	Sub-total (ASP * # sold/yr)
On Premise	\$ \$50,000 /OTC	3	\$150,000
Monthly Recurring Revenue (MRR)	\$ \$1,000 /month	7	\$42,000
Total = Average Partner Productivity / Year (list price)			\$ \$192,000 @ list
Less Partner Discount (per Navigator = 25%)			Less \$ \$48,000 \$ discount
Equals Net Partner Productivity / Year (net to MacroSoft)			\$ \$144,000 @ net

My Annual Quota? **\$5,000,000 net @ 25% discount**

Failure Rate =
% of partners recruited historically that didn't make revenue expectations

30%

Number of Partners Required =
quota / average partner productivity / year (round up)

35

Number of Partners Likely to Fail =
failure rate * number of partners required (round up)

11

Final Number of Partners to Recruit =
number of partners required + number of partners likely to fail (round up)

46



Use the Navigator to find the following info:

- Net Revenue Average Selling Prices (ASPs) – MRR vs OTC
- Revenues estimates
- and a 25% partner discount

...as you estimate the number of partners you will recruit.

Assume all CloudOne as a Service deals generate 6 months of MRR revenue; FOR CAPACITY PLAN SIMULATION ONLY ALL DEALS CLOSED IN JUNE.

In real life, there are two options when MRR is involved:

- the MRR is recognized monthly over the life of the contract
- in some cases, 36 months is recognized up front, aka, the Total Contract Value (TCV)

We will use real MRR to calculate and pay revenues and profit for the partner.

CAPACITY PLANNING WORKSHEET

FOR SIMULATION ONLY: ASSUME AS A SERVICE DEALS ARE SOLD IN JUNE

	ASP (for MRR use TCV)	Typical # Sold /Year	Sub-total (ASP * # sold/yr)
On Premise	\$ /OTC		
Monthly Recurring Revenue (MRR)	\$ /month		
Total = Average Partner Productivity / Year (list price)			\$ @ list
Less Partner Discount (per Navigator = 25%)			Less \$ \$ discount
Equals Net Partner Productivity / Year (net to MacroSoft)			\$ @ net

My Annual Quota? \$5,000,000

Failure Rate =
% of partners recruited historically that didn't make revenue expectations _____

Number of Partners Required =
quota / average partner productivity / year (round up) _____

Number of Partners Likely to Fail =
failure rate * number of partners required (round up) _____

Final Number of Partners to Recruit =
Number of partners required + number of partners likely to fail (round up) _____

ChannelMasters

Team Workshop Phase 2

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



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

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

SAMPLE

Capacity to Program Revenue Goal

- # of partners to recruit
- Typical Partner Productivity IN \$ DOLLARS
- First year revenue goal for the MacroSoft Program

Budget Allocations

- \$ allocated by category from Phase 1

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 for how many partners to recruit
- How this many partners, through Typical Partner Productivity, will make the stated Revenue Goal

Program Elements

Ideal Partner Profile: _____

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



Give (program benefits):

Get (program requirements):



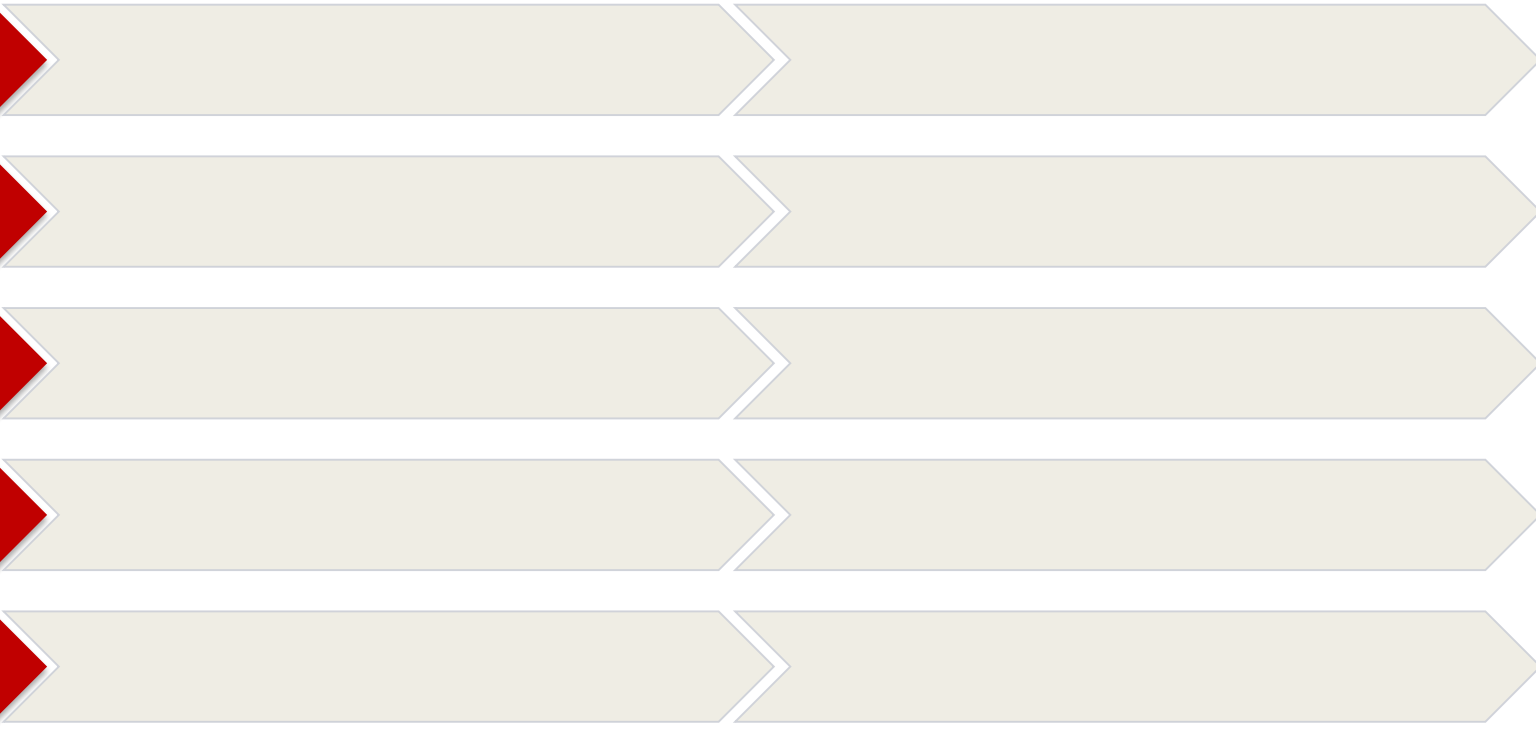
Education

Support

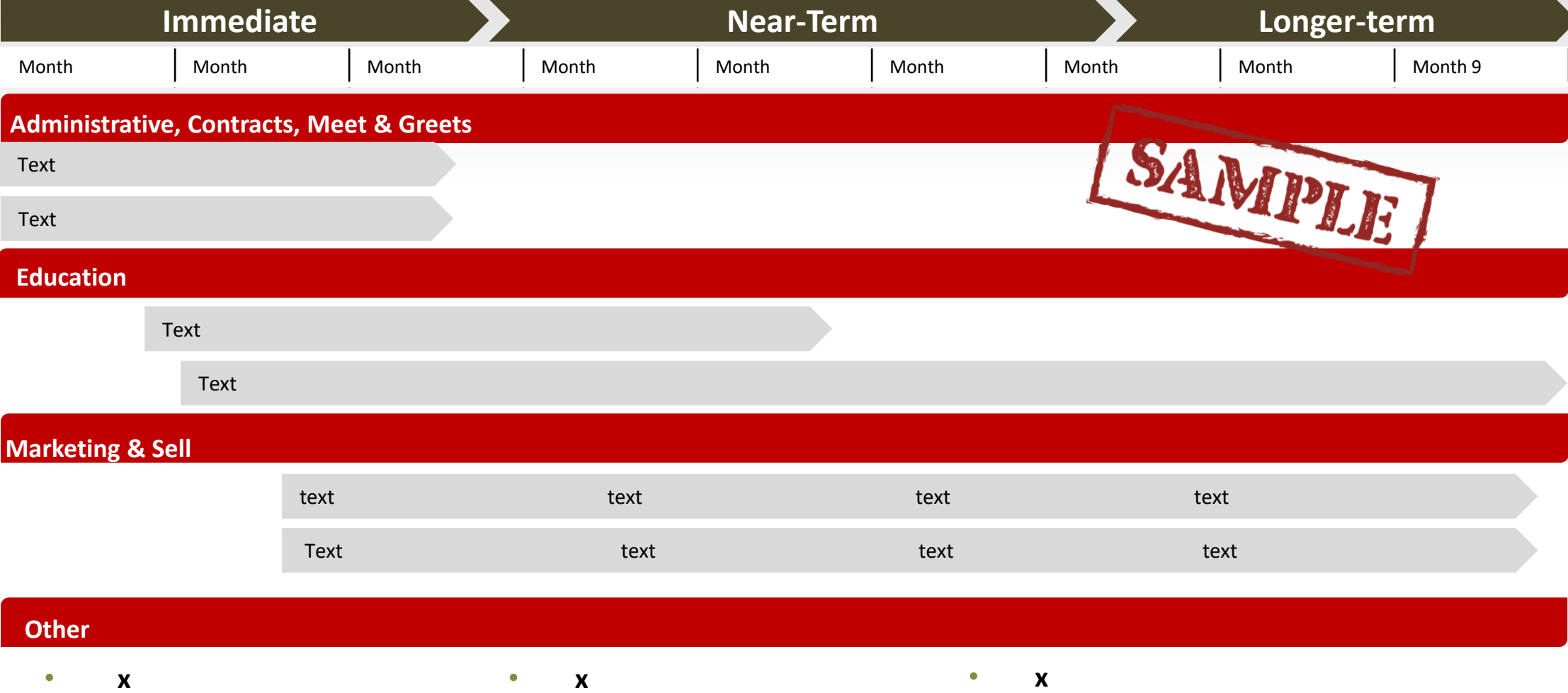
Marketing

Sales

Other



On-boarding Timeline – Brand it



Measures of Success

SAMPLE

Determine what you will Measure and Track!!

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

SAMPLE

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Customer Wins	\$10M		



1. Do you support our plan?

2. These are our next steps

3. ?