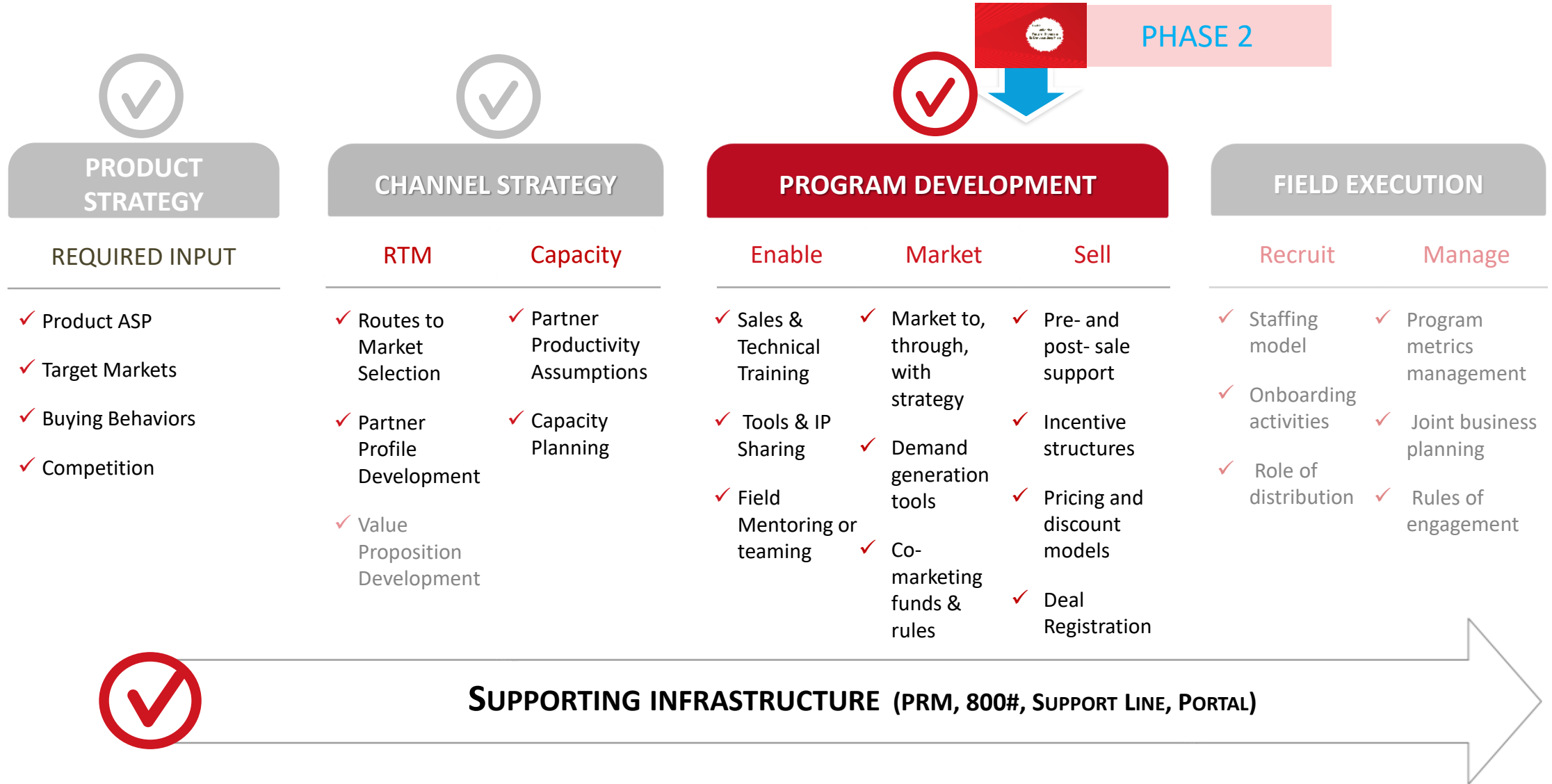


PHASE 2

**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

**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 >](#)



“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.

### Do you Resell?

Design a comprehensive, integrated solution from our vast product portfolio.

[Learn more about the Resell model](#)



### Do you Develop?

Explore, develop and test on IBM platforms with wide-ranging capabilities.

[Learn more about the Development model](#)



### Do you Implement?

Implement and deploy your IBM based solutions with our reliable infrastructures.

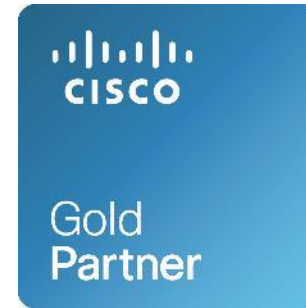
[Learn more about the Implementation model](#)



Don't see an approach that works your way? There are other paths you can take to partner with IBM.

[Learn more](#)

# Cisco Partner Program 2019: Building Lifecycle Management & Business Value Selling Skills



- The ability to sell 4 hybrid IT services (their own, Cisco's or another Cisco-powered provider's offering)
- 40% services attach rate
- Min. of 15% of total revenues from services
- 12 unique FT certified employees
  - ✓ Up to 4 Selling Business Outcomes-trained staff or Cisco Business Architecture Approach-trained staff
  - ✓ Four Advanced architectural specializations
- Mandatory participation in the end-user satisfaction survey



# Cloud & Managed Service Providers: Cisco ConnectWise Unite

## 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 >>](#)



- 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

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



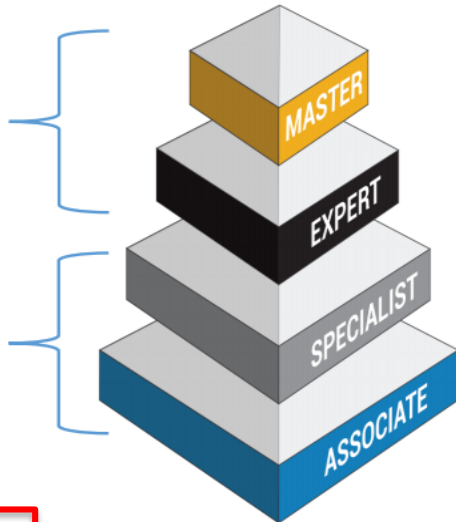
# Dell Technologies Trains and Shares Services IP to Help Partners Build their Deployment Services Capabilities

- Formal deployment (Prof.) services authorization
- Supporting formal training & competency structure
- Share service delivery IP between Dell EMC and partners' Implementation Engineers

## Certification Levels

**Experience Based**  
Training Assisted  
**Credential Expires**  
Requires recertification every 2 years

**Training Aligned**  
Apply knowledge  
**Versioned**  
based on significant product / solution changes



**Dell Technologies Certified Master (DCM)**  
Subject matter expertise with experience in multiple technologies and complex solutions

**Dell Technologies Certified Expert (DCE)**  
Advanced skills and experience in one or more technologies

**Dell Technologies Certified Specialist (DCS)**  
Role specific training, baseline skills in a given technology

**Dell Technologies Certified Associate (DCA)**  
Fundamentals training and knowledge of a technology

## Certification Tracks

Technology Architect (TA)  
Implementation Engineer (IE)

Cloud Architect (CA)  
Platform Engineer (PE)

Enterprise Architect (EA)  
Data Scientist (DS)

Systems Administrator (SA)



	Portfolio Competencies	Solutions Competencies	Service Delivery Competencies*
Client Solutions	Core Client Workstations Cloud Client-Computing Client Data Security	High Perform. Computing IoT	Client Services
Infrastructure Solutions	Storage Data Protection Converged / Hyper-Converged Infrastructure	Software Defined Infrastructure Hybrid Cloud Connected Workforce	Storage Services Data Protection Services Converged / Hyper-Converged Infrastructure Services
	Server		Server Services
	Networking		Networking Services

\*Services Competencies are required to deliver services on select products but are not a requirement for Tier compliance.

# Building Holistic Lifecycle Services is an Enablement Best Practice



- Cisco's Land, Adopt, Expand & Renew (LAER) Lifecycle Services Model
- Fed by best practices and learnings from Cisco's own Customer Success organization
- Supported by:
  - VIP incentives to land and activate new software subscriptions
  - Automation tools portal (SuccessHub)
  - Sales/Marketing campaign automation tool



## SuccessHub

Grow customer loyalty, improve retention rates, and create a culture of customer success within your organization. Check out our collection of free resources - all here to help you build your own customer success practice.

Subscribe for updates

Subscribe

LIVE WEBINAR SERIES  
**SuccessTalk**

**Digital: It's Now or Never**  
November 14 @ 2pm EST - REGISTER NOW

**Why Invest in Customer Success**  
November 28 @ 2pm EST - REGISTER NOW

**SuccessTalk Rewind**   
Get Caught Up - WATCH 2016 SESSION HIGHLIGHTS

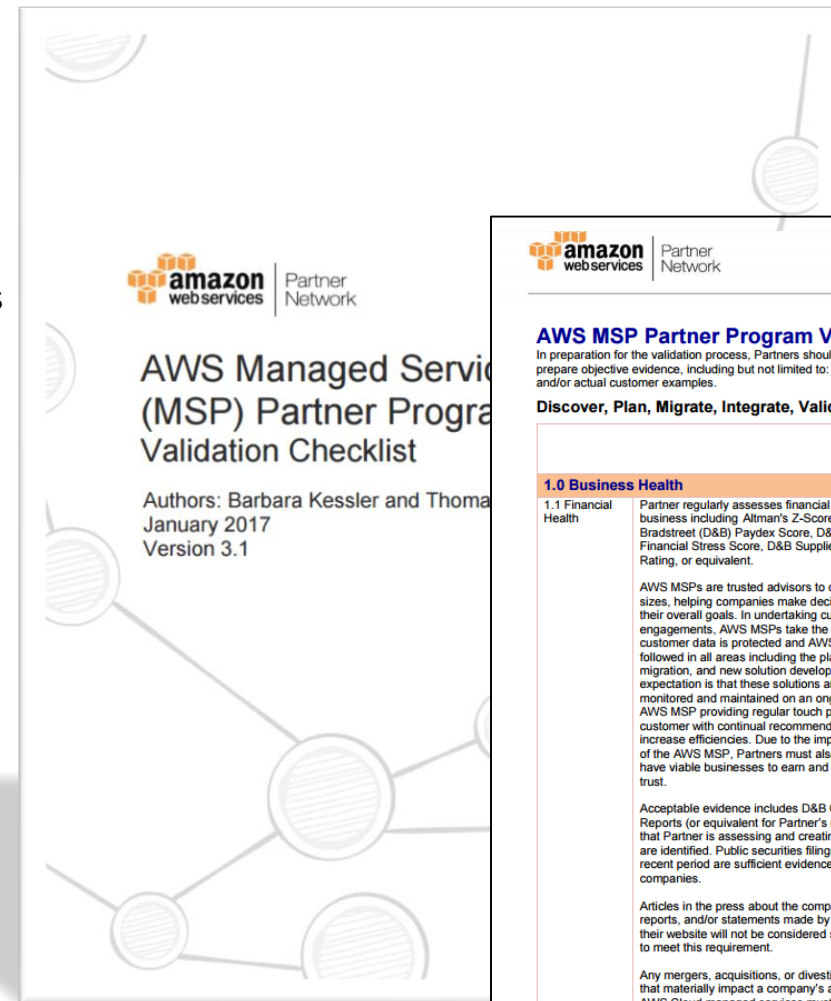


# Partner Program Examples: Complex Cloud Data Center Managed Services Equates to Larger Investments



## Emerging vendors are NOT encumbered by the past.

- ✓ Focused on WHY they need partners and offering targeted programs
- ✓ Program built to “provide AWS recommended” MSP for customer to engage
- ✓ 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 3<sup>rd</sup> 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 = 140 MSP partners



		Subtract if Does Not Meet Capability	Add if Does Meet Capability	Partner Self-Assessment	Auditor Validation
<b>1.0 Business Health</b>					
1.1 Financial Health	<p>Partner regularly assesses financial health of their business including Altman's Z-Score, Dun and Bradstreet (D&amp;B) Paydex Score, D&amp;B Rating, D&amp;B Financial Stress Score, D&amp;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&amp;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		

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



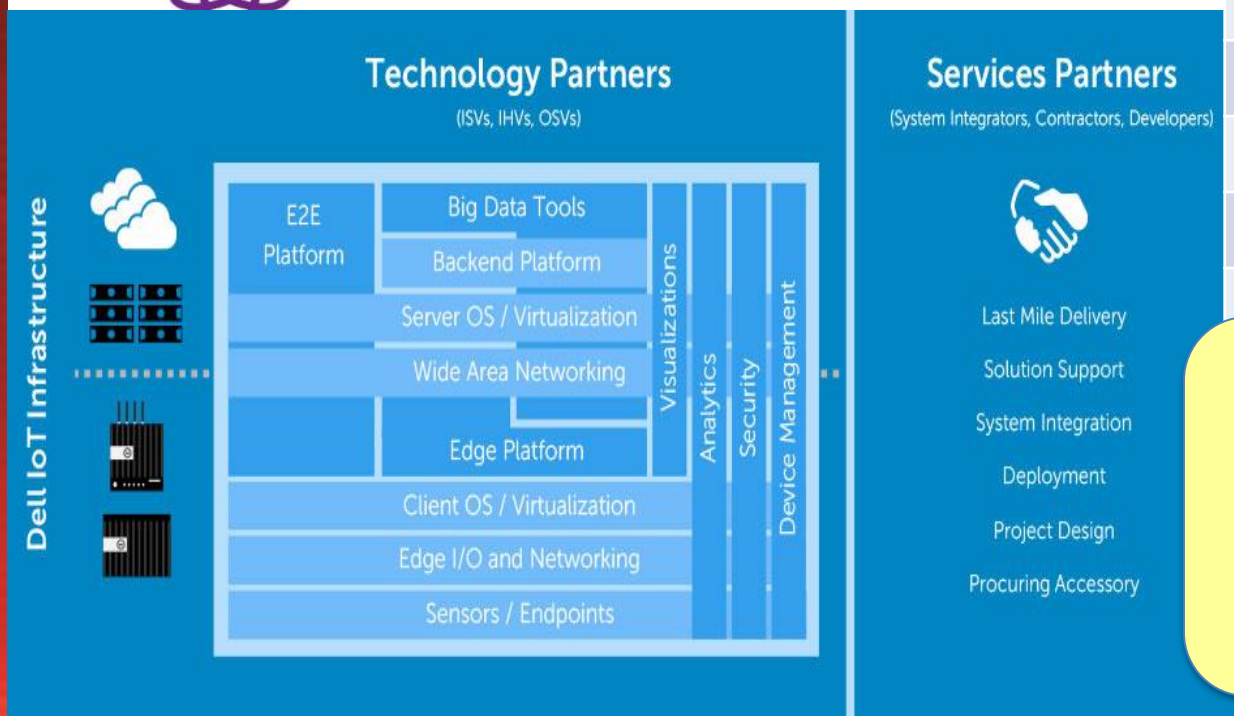
✓ **Roles/Biz Models**

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

**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

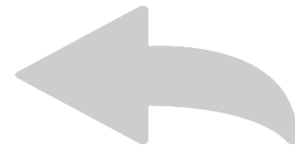
Feature	Gold	Platinum	Titanium
Potential for joint case studies	○	○	○
Structured contact with Dell Partner Program Team	-	○	○
Access to partner portal resources	-	○	○
Opportunity to collaborate with other partners within IoT Partner Program	-	○	○
Listing on Find a Partner page on delliotpartners.com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

### ✓ Call to Action

#### How to Enroll – Next Steps

- Submit a short application
- 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.

**Back to the  
Simulation**

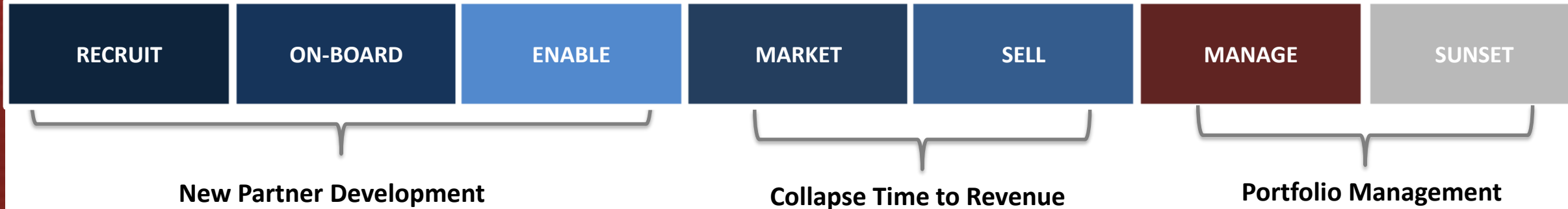


## Now Build Out the Program and On-Boarding Capabilities



# Partner Management Lifecycle

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

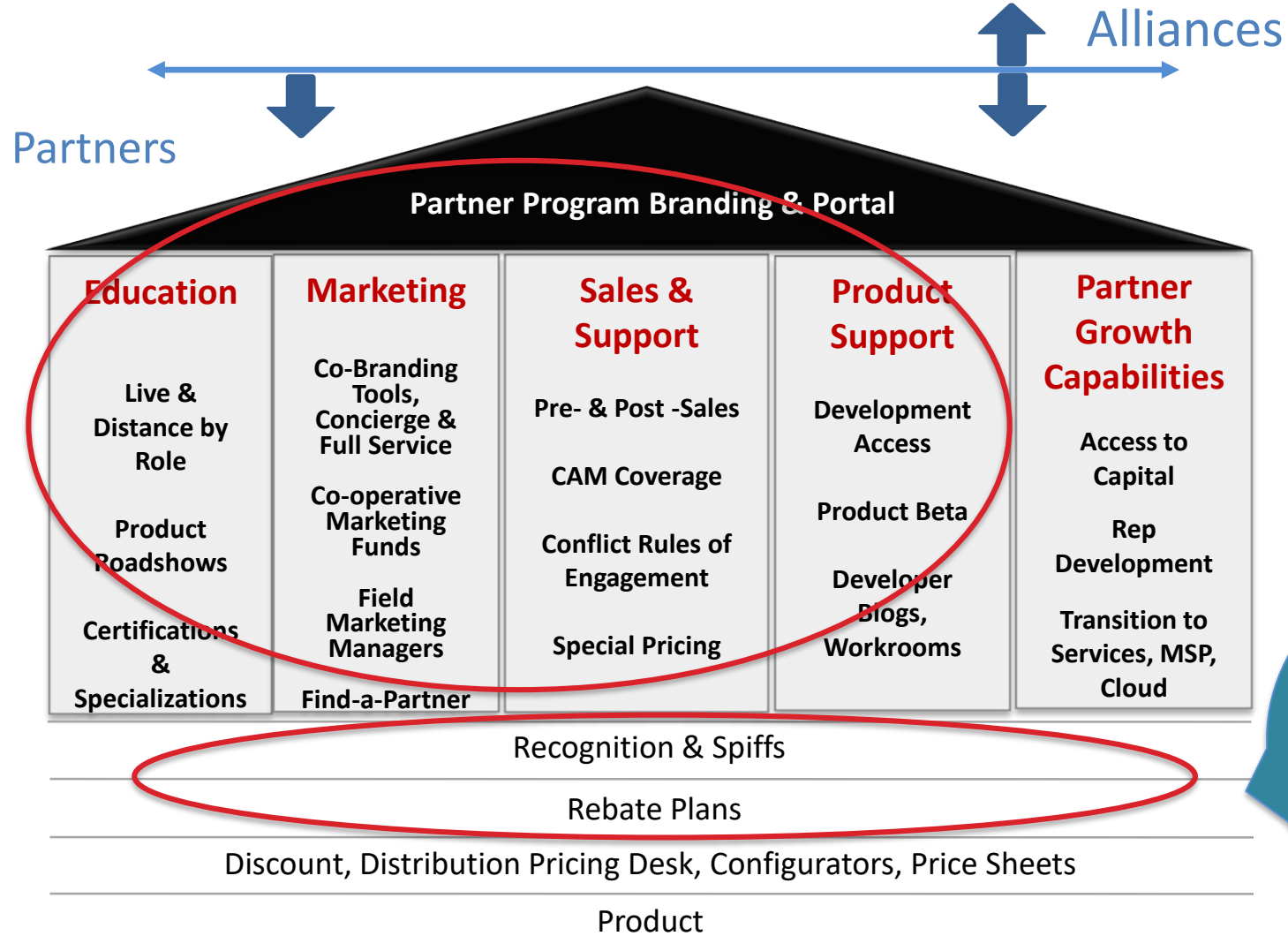


- *How much effort / investment?*
- *How much revenue expected?*
- *How stable is the relationship?*
- *Which specific actions / tactics apply?*

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

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

Simulation Phase 2



Spiffs also valuable for VARs to incentivize education, penetrate new markets or push commodity products

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

## Vendor Program Give to Get

(When a Vendor GIVES OR INVESTS in)

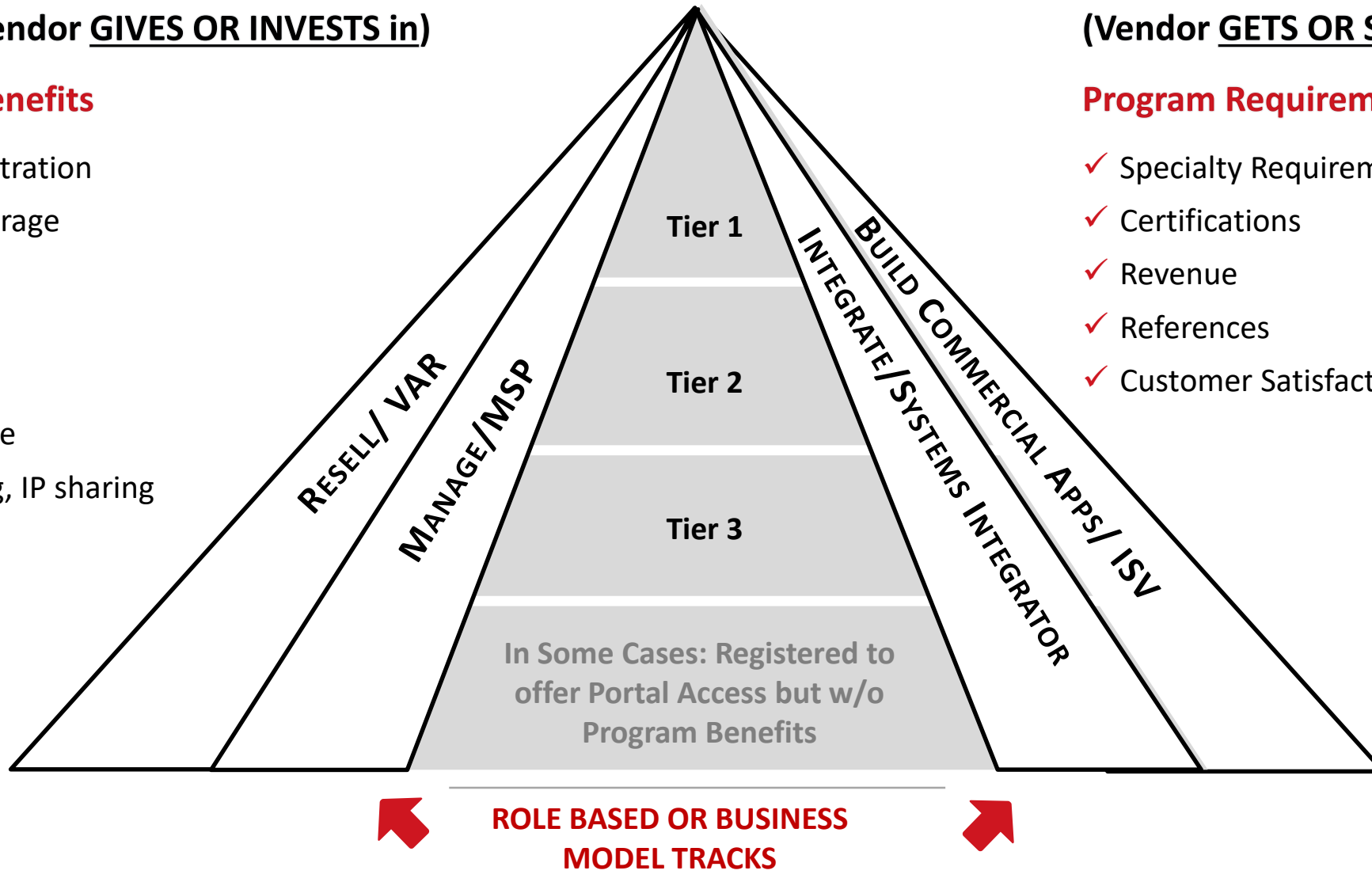
### Program Benefits

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

(Vendor GETS OR SEES RETURN in)

### Program Requirements

- ✓ Specialty Requirements
- ✓ Certifications
- ✓ Revenue
- ✓ References
- ✓ Customer Satisfaction





# Deal Registration: Rightly or Wrongly...Vendors Have Taught Partners to Expect It...

Is it necessary, with no direct sales team and a small number of partners with biz plans?

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 by offering additional points

Goal also determines if reg. benefit is:

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

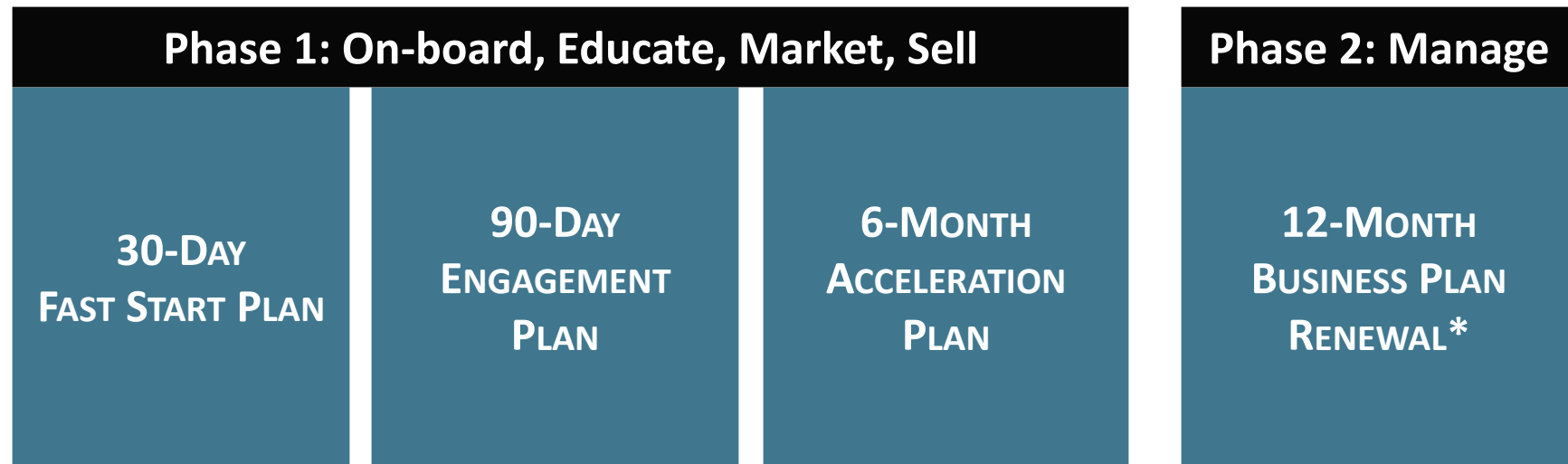
Offer view to pipeline, incremental revenue

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

Deal Registration is typically accompanied by Rules of Engagement to set clear expectations for all parties.

# 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
- ✓ Sales Introductions
- ✓ Initial Technical Training, Marketing Plan
- ✓ Direct or indirect fulfillment model (to vendor or disti) determined

## 90-Day Engagement Plan

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

## 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

# 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)	1,200		
Joint Sales Calls (1/month/partner)	360		
Customer Wins	\$10M		

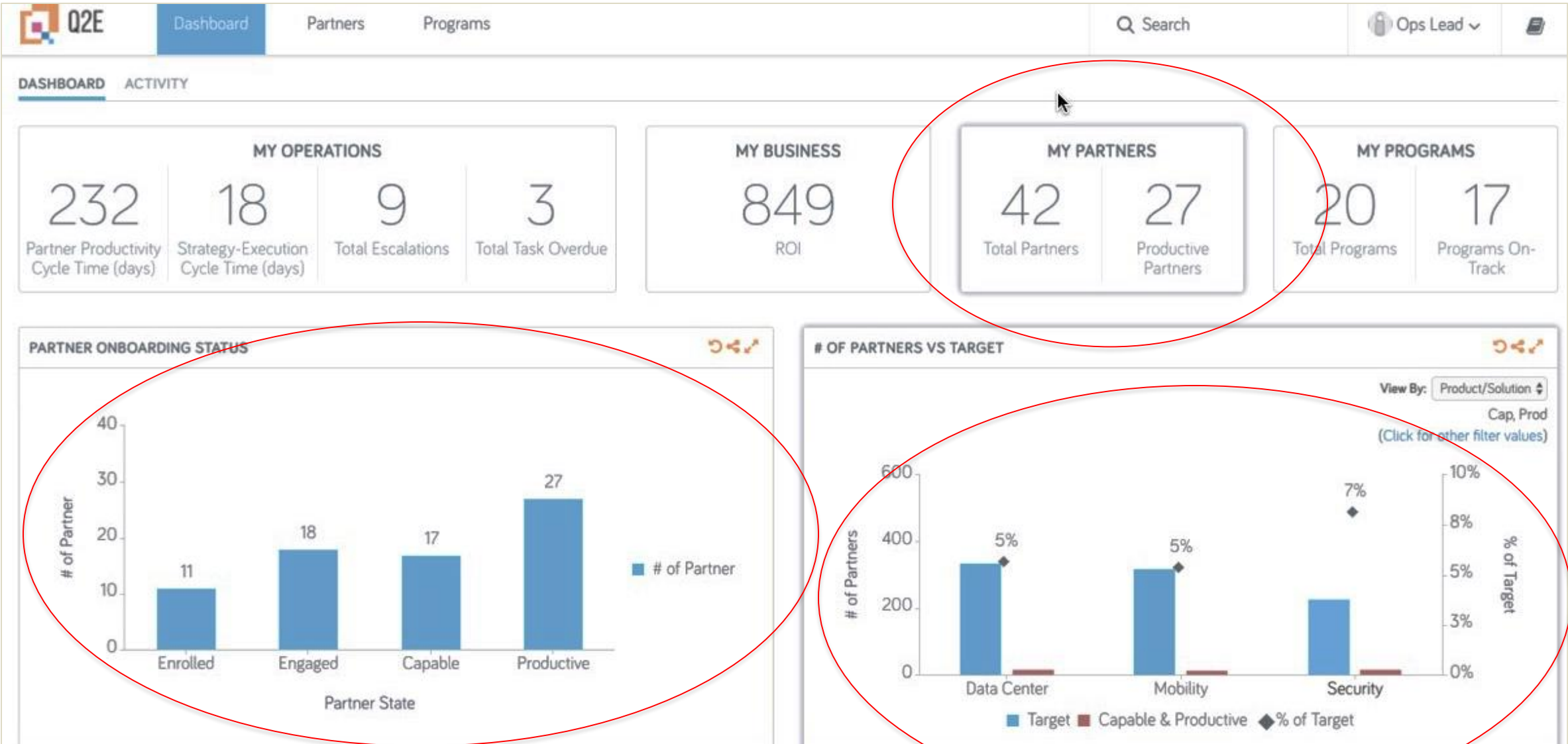
## Monthly Dashboard Metrics

Track performance against plans:

- Capacity
- Sales & Tech. Capabilities
- Marketing
- Revenue

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

# In Real Life: 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 Planning Initiated
- 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
- Execute Marketing Plan
- 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



# As Programs Evolve; Product Focus is Insufficient. Solutions are Required!

## CRITICAL KNOWLEDGE FOR PHASE 3

**IN  
REAL  
LIFE**

### Use Cases

- Managed Security or Networking
- Digital Ready Infrastructure
- Hybrid Cloud Server
- IoT/AI Server
- Backup-Disaster Recovery
- Any LOB or Departmental Enterprise Server

**In Our  
Simulation**

- **Business Problem**

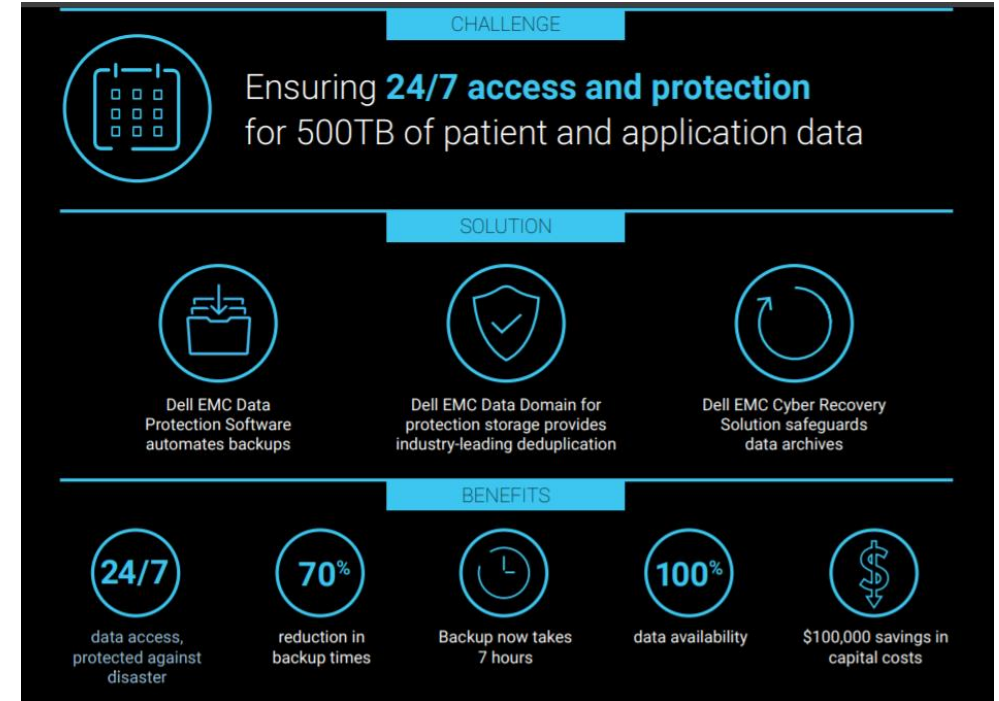
- A need for: 24/7 access to and protection of patient data, records & diagnostic images
- Archive data for 18 years, achieve regulatory compliance
- Need fast, easy, automated backups

- **Solution**

- Dell EMC Data Protection Software automates backups
- Dell EMC Data Domain for protection storage provides industry-leading deduplication
- Dell EMC Cyber Recovery Solution safeguards data archives
- Dell EMC ECS (Elastic Cloud Storage)

- **Benefits**

- 24/7 availability of patient records and images
- Accelerated data restore, enhancing the user experience
- Data access protected against disaster; Streamlines and assures regulatory compliance
- Simplified data management, backup and archiving
- Back-up times reduced from 20-24 to 7 hours (70%)
- Reduced operating costs with a \$100K savings in capital costs



<https://www.emc.com/en-us/search.htm#/search/cPage=1:numP=1:query=phoenix%2520children's%2520hospital:resultPerPage=10:searchScan=null>

Merck leverages transformational hybrid cloud services to deliver life-saving remedies, while lowering operating costs and responding faster.

- **Business Problem**

- Merck's IT resources must achieve high levels of availability in support of life-saving drugs needed to cure and prevent disease.

- **Solution**

- Developed greater computation and storage capabilities through converged infrastructure
- Implemented a hybrid solution including both on-premise and off-premise (Cloud) components.

- **Benefits**

- Ability to deploy infrastructure both on and off premises
- Improved flexibility
- Lower operating costs with higher level of quality
- Improved ability to report to the business

<https://www.hpe.com/us/en/services.html>

The Otto Group is a global and one of the world's largest online retailers. The Group comprises some 123 companies in more than 30 countries across Europe, North and South America and Asia. These companies can be grouped into three main sectors: multichannel retail , financial services and the service sector (logistics service provider Hermes and predictive analytics provider Blue Yonder).

- **Business Problem**

- To improve IT services provisioning to end customers
- Provide a higher quality IT service to internal Otto Group clients

- **Solution**

- Complete transformation of Otto Group IT, including implementing a new hybrid IT (Digital Ready) operating model, with the help of HPE Transformation Consulting

- **IT Benefits**

- Better positioned to cope with future IT challenges
- Higher degree of IT standardization and automation provides more time for innovations and projects
- Competitive service quality and prices have led to more companies within the Group becoming IT customers

- **Customer Benefits**

- Up to 90% reduction in IT services provision times, thereby accelerating business project implementation
- Higher internal customer satisfaction with regard to IT services
- 40% decrease in Otto Group IT's operating costs means that it can now provide quality and cost-optimized IT services
- End customers of the companies within the Group benefit from innovative shopping experiences based on reliable solutions provided by Otto Group IT

<https://www.hpe.com/us/en/services/consulting.html> <https://www.hpe.com/us/en/searchresults.html?page=1&autocomplete=0&q=otto%20group>

AeroFarms is the world leader in indoor vertical farming and sustainable agriculture. This indoor vertical farm uses data-driven insights from IoT deployment to increase yields, conserve resources and improve flavor.

- **Business Problem**

- Achieve higher crop yields while conserving natural resources and delivering a better product to the consumer; a very real transformation in agriculture.

- **Solution**

- Created an edge-to-core-to-cloud architecture utilizing Dell consulting services, Azure cloud services, Dell edge gateways & rugged tablets.
- Sensors capture operating and environmental data and send it to Dell IoT Edge Gateways. Information then relayed to Dell Latitude Rugged Tablets and local server cluster. Information is monitored and analyzed.
- Future projects include growing customer's machine learning capabilities with Dell EMC Ready Solutions thus delivering core computing to automate the analytics process.

- **Customer Benefits**

- Ability to collect new data indicating light and nutrient levels for agricultural plantings
- 390x productivity using 95% less water and no pesticides
- Improved quality, taste & texture

<https://www.emc.com/en-us/search.htm#/search/cPage=1:numP=1:query=aerofarms:resultPerPage=10:searchScan=null>



# **Team Workshop Phase 2**

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

# Team Workshop Phase 2 – Reading the Navigator Handbook

## Navigator (Simulation) Overview

- Pages 4-6

## The Business Environment

- Pages 7-14
- The Product: “MacroSoft’s CloudOne Appliance”
- Managed Services Offering: ASP \$1,000 per mo./per appliance
- Target market: SMB, mid-market and enterprise
- Competitive Landscape: limited to one major appliance vendor, but many larger HW & SW vendors claim capabilities via alliance or OEM relationships
- Single tier channel of highly productive HW & SW VARs with solution and managed services capabilities. Annual revenues of \$10M - \$40M and growing.

## Phase 2: Build the Partner Program & On-boarding Plan

- ✓ Present your Enablement Program to your Company Management: Page 21

### TEAM WORKSHOP PHASE 2

#### ■ BUILD THE PARTNER PROGRAM & ON-BOARDING PLAN

##### Assignment

In this assignment, your team should complete the following activities:

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

##### Time allocation

- Team Presentation: 13 Minutes

##### Information for your assignment

- The panel will consist of your peers and they will also be in role play mode.
- There will be a panelist from each team (and we expect them to be honest and fair) and they will all be playing the same role of Senior Management in your company.
- Use the information provided in the lecture material to develop a compelling story on how your team is going to help partners be successful.
- During your presentation, the panel will grade your team on the following criteria:
  - **Believability:** Has the team been realistic in terms of a Partner Program that will execute resulting in partners that will deliver the committed revenue? Might partners execute? Can we, the vendor, execute?
  - **Collapses Time to Revenue:** Does the on-boarding, education and marketing plan, processes and infrastructure either accelerate revenue or decrease investment costs resulting in a shorter time to achieve payback on this technology?
  - **Reasonable Milestones:** Have I bought into the milestones that track progress toward vendor and partner commitments and goals? Are they reasonable within what we, as a company, and the partner could truly accomplish?
  - **Mutual Business Benefit:** Does the plan represent a balanced and shared investment scenario between the vendor and partner as presented over the short and long term? Does the program meet the needs of the Ideal Partner Profile?

##### Final Deliverable

- 4-6 slide Powerpoint presentation emailed to Lisa Sabourin before you leave the work session.

# Phase 2: Your Assignment

## Build Out the Partner Program, On-boarding Plan & Measures of Success PowerPoint Deck Including:

- 1 **Screening criteria** to qualify prospects for the Ideal Partner
- 2 **Benefits & Requirements** for:
  - Education
  - Support
  - Marketing
- 3 **On-boarding Timeline with Milestones**
- 4 **Revenue Metrics/Measures of Success** tied to the \$2M investment in the Program



- *You are the Program Manager gaining buy-in to your program and metrics before you roll it out nationally.*
- *Utilize the budget priorities you decided upon in **Phase 1**.*
- *Your peers will role-play your leadership team and will rate you fairly on your presentation.*



# Partner Program and On-boarding Plan with Metrics Scoring Criteria

## BELIEVABILITY

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

## COLLAPSES TIME TO REVENUE

- Does the on-boarding, education and marketing plan, processes and infrastructure either accelerate revenue or decrease investment costs resulting in a shorter time to achieve payback on this technology?

## REASONABLE MILESTONES

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

## MUTUAL BUSINESS BENEFIT

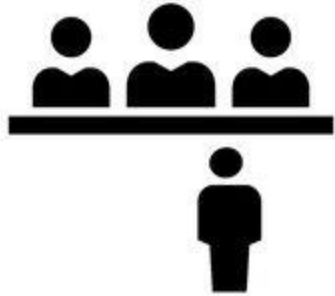
- Does the plan represent a balanced and shared investment scenario between the vendor and partner as presented over the short and long term?
- Does the program meet the needs of the Ideal Partner Profile?

The image shows a 'Partner Program and On-boarding Plan Judging Scoring Sheet' from Channel Masters. It features a 'JUDGING CRITERIA' table with four rows, each corresponding to one of the metrics in the main content. Each row has a 'SCORE' column with a box for the score and a 'TOTAL POSSIBLE POINTS = 25' label. At the bottom, there is a 'TOTAL POINTS' box. The sheet also includes the Channel Masters logo and the text 'October 2019 Kickoff Workshop - Phase 2'.

JUDGING CRITERIA	SCORE
Has the team been realistic in terms of a Partner Program that will execute resulting in partners that will deliver the committed revenue? Can we, the vendor, execute?	<input type="text"/> TOTAL POSSIBLE POINTS = 25
Does the on-boarding, education and marketing plan, processes and infrastructure either accelerate revenue or decrease investment costs resulting in a shorter time to achieve payback on this technology?	<input type="text"/> TOTAL POSSIBLE POINTS = 25
Have I bought into the milestones that track progress toward vendor commitments and goals? Are they reasonable within what we, as a company, and the partner could truly accomplish?	<input type="text"/> TOTAL POSSIBLE POINTS = 25
Does the plan represent a balanced and shared investment scenario between the vendor and partner as presented over the short and long term? Does the program meet the needs of the Ideal Partner Profile?	<input type="text"/> TOTAL POSSIBLE POINTS = 25

**ChannelMasters**  
TOTAL POINTS   
October 2019 Kickoff Workshop - Phase 2

# Team Presentations: Partner Program & On-boarding




- ✓ You are presenting your Program, On-boarding Plan and Measures of Success to your manager and other company cross divisional managers who have supported your effort
- ✓ Panel: Peers role-playing the individual executives
- ✓ We have confidence that judges will assess their teams as they do all others!!

## Timeline:

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





**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

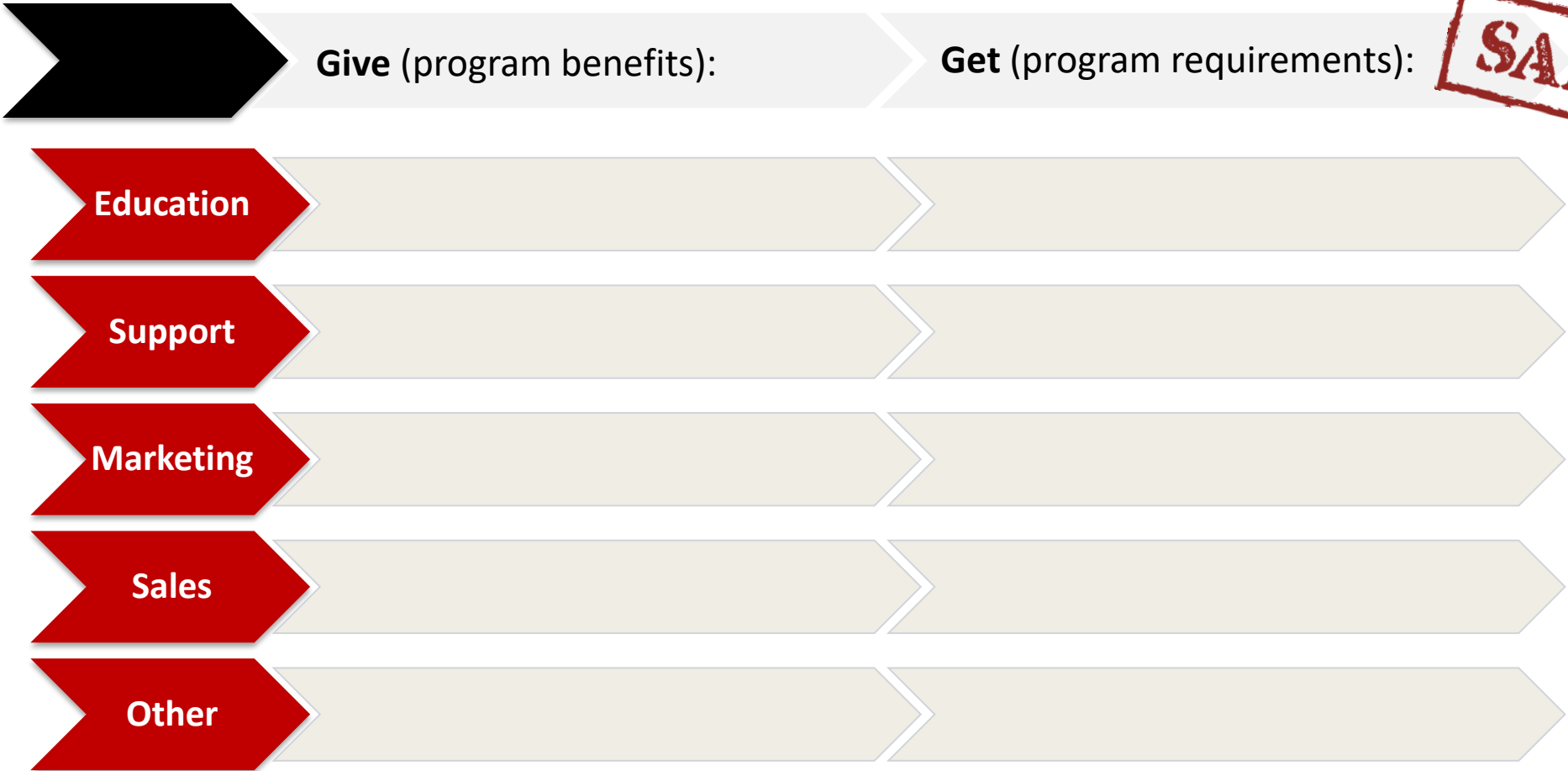
**Background**...in prior meetings we were granted a \$2M budget, this is how we will use the budget to achieve the revenue goal

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

# Program Elements

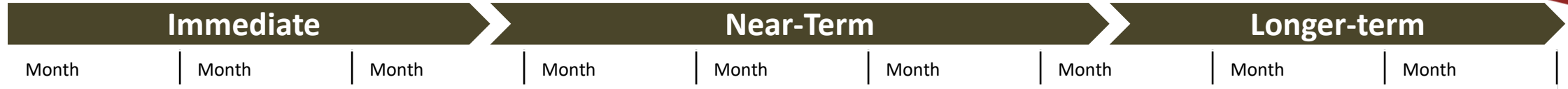
Ideal Partner Profile: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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



**SAMPLE**

# Insert On-boarding Program Name Here ...



## Administrative, Contracts, Meet & Greet

Text

Text

## Education

Text

Text

## Marketing & Sell

text text text text

Text text text text

## Other

• X

• X

• X

# Measures of Success

**SAMPLE**

*Determine what you will Measure and Track!!*

	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

**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		



# Summary or Close

**SAMPLE**

1. Do you support our plan?

2. These are our next steps

3. ?

# Phase 2: Your Assignment

## Build Out the Partner Program, On-boarding Plan & Measures of Success PowerPoint Deck Including:

- 1 **Screening criteria** to qualify prospects for the Ideal Partner
- 2 **Benefits & Requirements** for:
  - Education
  - Support
  - Marketing
- 3 **On-boarding Timeline with Milestones**
- 4 **Revenue Metrics/Measures of Success** tied to the \$2M investment in the Program



- *You are the Program Manager gaining buy-in to your program and metrics before you roll it out nationally.*
- *Utilize the budget priorities you decided upon in **Phase 1**.*
- *Your peers will role-play your leadership team and will rate you fairly on your presentation.*

# Build Program Debrief

- ❖ Going from Budget Build to Program Construction? How difficult?
- ❖ On-boarding, in whose organization does this responsibility lie?
  - Which partners get TLC?
- ❖ Commodity product vs. complex product enablement plans?
- ❖ Templates, processes, branded?

