Build the Partner Program & On-boarding Plan
Phase 2

Finalize Strategy Based on Product Management Plans

PRODUCT STRATEGY	CHANNEL STRATEGY		PROGRAM DEVELOPMENT			FIELD EXECUTION	
REQUIRED INPUT	RTM	Capacity	Enable	Market	Sell	Recruit	Manage
✓ Product ASP	✓ Routes to Market Selection	✓ Partner Productivity Assumptions	✓ Sales & Technical Training	✓ Market to, through, with strategy	✓ Pre- and post- sale support	✓ Staffing model	✓ Program metrics management
✓ Target Markets	✓ Partner Profile Development	✓ Capacity Planning	✓ Tools & IP Sharing	✓ Demand generation tools	✓ Incentive structures	✓ Onboarding activities	✓ Joint business planning
✓ Buying Behaviors	✓ Value Proposition Development		✓ Field Mentoring or teaming	✓ Co-marketing funds & rules	✓ Pricing and discount models	✓ Role of distribution	✓ Rules of engagement
✓ Competition					✓ Deal Registration		

Phase 2

✓ **SUPPORTING INFRASTRUCTURE** (PRM, 800#, SUPPORT LINE, PORTAL)

IN REAL LIFE

Role Based versus Specific Track Program Structures

Driving Cloud Adoption by Role:

✓ Cloud Builder – designed for those building clouds (private and pubic)

✓ 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.

Driving Change

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

ConnectWise UNITE™

Cisco Invests in Intellectual Property to Help Partners Build Services Practices

"Common eligibility structure and investment path …."

All automated – Partner Self-Service Tool

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

amazon web services

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 = 113 MSP partners

As of 2017

amazon web services | Partner Network

AWS Managed Service (MSP) Partner Program Validation Checklist

Authors: Barbara Kessler and Thomas R[...]
January 2017
Version 3.1

amazon web services | Partner Network — AWS MSP Partner Program Validation Checklist

AWS MSP Partner Program Validation Checklist

In preparation for the validation process, Partners should become familiar with the items outlined in this document, and prepare objective evidence, including but not limited to: prepared demonstration to show capabilities, process documentation, and/or actual customer examples.

Discover, Plan, Migrate, Integrate, Validate

		Subtract if Does Not Meet Capability	Add if Does Meet Capability	Partner Self-Assessment	Auditor Validation
1.0 Business Health					
1.1 Financial Health	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.	-200	0		
	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.				
	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.				
	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.				
	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.				
1.2 Financial Planning and Reporting	Partner has processes in place for financial planning, including forecasting, budgeting, and review of financial metrics and reports.	-200	0		
	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.				

DELL EMC

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*

Technology Partners
(ISVs, IHVs, OSVs)

Dell IoT Infrastructure

E2E Platform
Big Data Tools
Backend Platform
Server OS / Virtualization
Wide Area Networking
Edge Platform
Client OS / Virtualization
Edge I/O and Networking
Sensors / Endpoints

Visualizations
Analytics
Security
Device Management
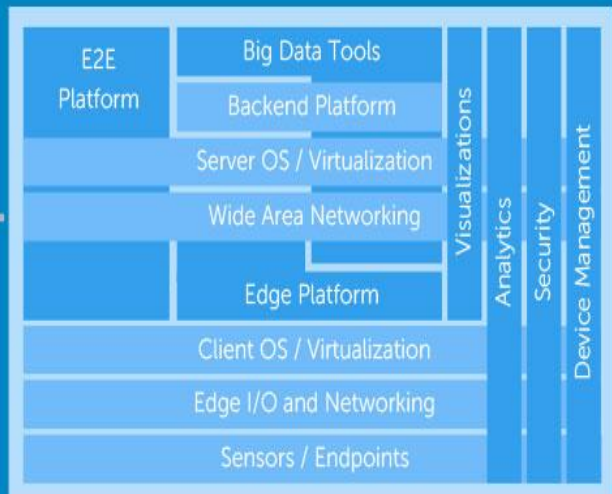
Services Partners
(System Integrators, Contractors, Developers)

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

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

Service Provider Benefits & Requirements

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

✓ *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.

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Partner Management Lifecycle

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

RECRUIT	ON-BOARD	ENABLE	MARKET	SELL	MANAGE	SUNSET

New Partner Development **Collapse Time to Revenue** **Portfolio Management**

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

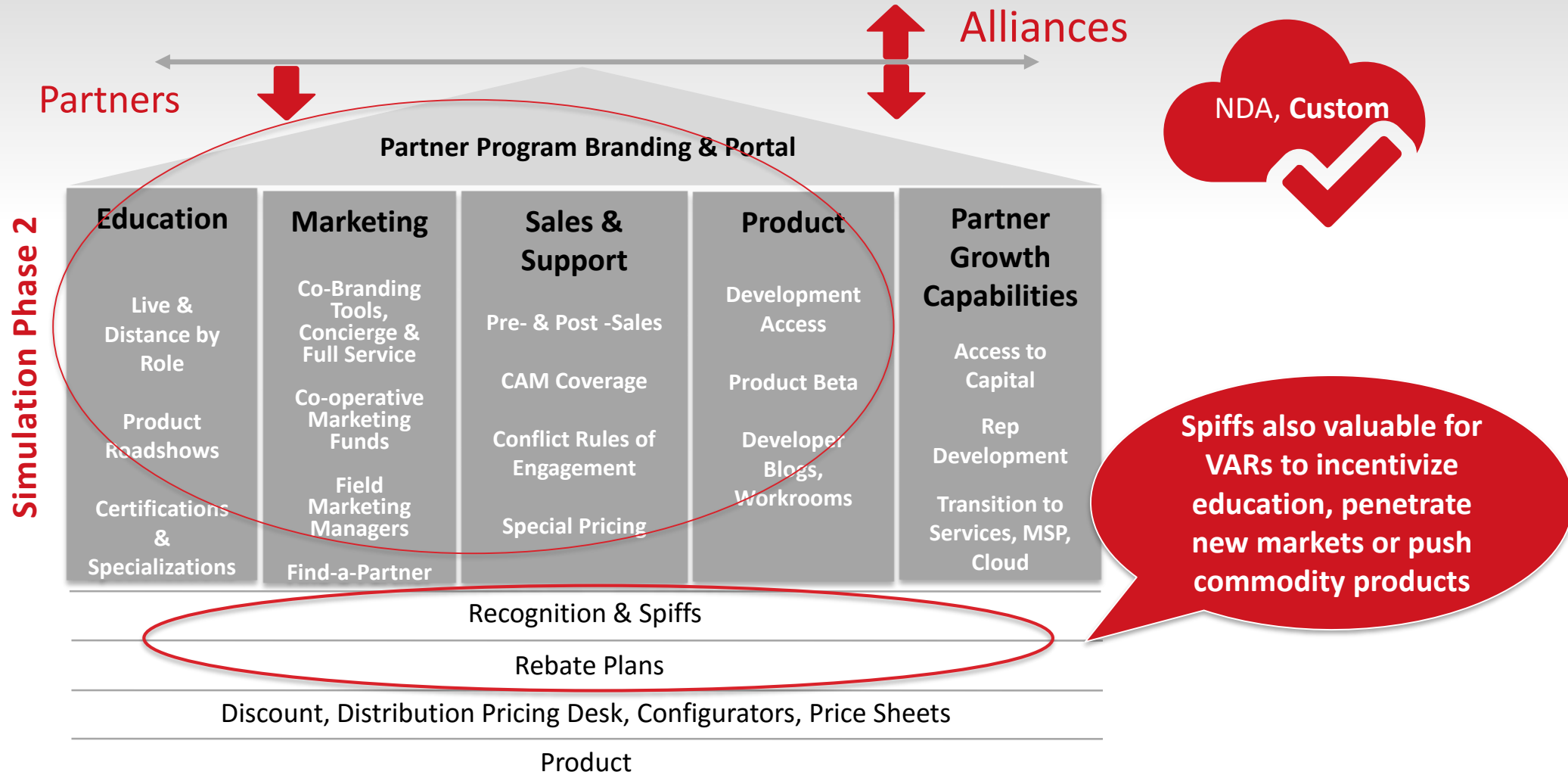*Each discipline must be adapted to partner types
(model / effectiveness / etc.)
as well as relationship type & coverage model*

Now Build Out the Program and On-Boarding Capabilities

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

Alliances

Partners

Partner Program Branding & Portal

Simulation Phase 2

Education	Marketing	Sales & Support	Product	Partner Growth Capabilities
Live & Distance by Role	Co-Branding Tools, Concierge & Full Service	Pre- & Post -Sales	Development Access	Access to Capital
Product Roadshows	Co-operative Marketing Funds	CAM Coverage	Product Beta	Rep Development
Certifications & Specializations	Field Marketing Managers	Conflict Rules of Engagement	Developer Blogs, Workrooms	Transition to Services, MSP, Cloud
	Find-a-Partner	Special Pricing		

Recognition & Spiffs

Rebate Plans

Discount, Distribution Pricing Desk, Configurators, Price Sheets

Product

NDA, **Custom**

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

Program Benefits
(Vendor GIVES)

✓ Deal Registration

✓ CAM Coverage

✓ Education

✓ MDF

✓ Rebates

✓ Logo Usage

✓ Mentoring, IP

✓ Etc.

Platinum

Gold

Silver

Bronze

ISV

VAR

MSP
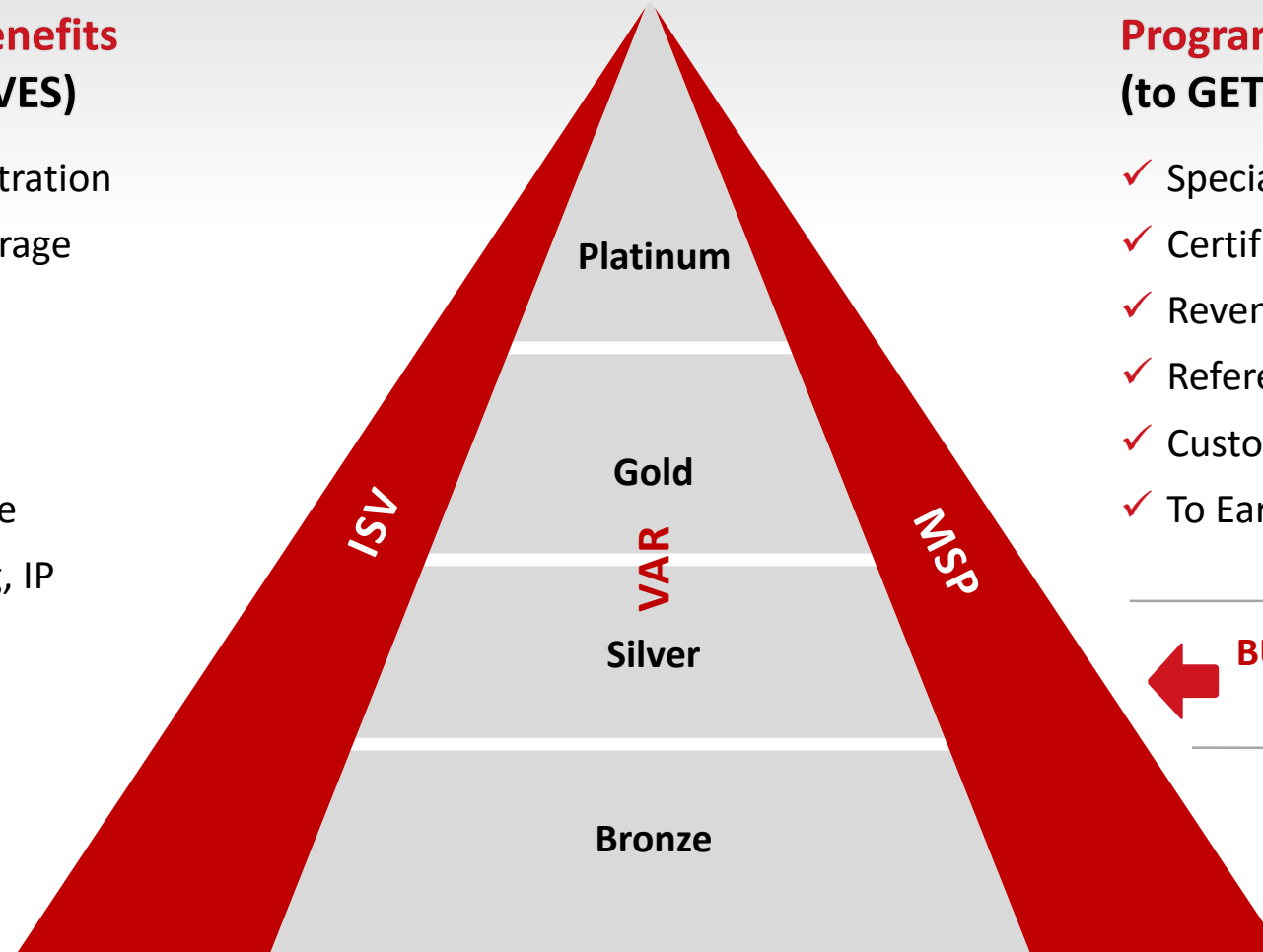
Program Requirements
(to GET from Partner)

✓ Specialty Requirements

✓ Certifications

✓ Revenue

✓ References

✓ Customer Satisfaction

✓ To Earn Points or Levels, etc.

← **BUSINESS MODEL OR ROLE BASED TRACKS**

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

Offer view to pipeline, incremental revenue

Incentivize desired behavior (SMB, new logo, first in, 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

Phase 1: On-board, Educate, Market, Sell			Phase 2: Manage
30-Day Fast Start Plan	**90-Day Engagement Plan**	**6-Month Acceleration Plan**	**12-Month Business Plan Renewal***

*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	90-Day Engagement Plan	6-Month Acceleration Plan	12-Month Business Plan
✓ Basic Connections, Contracts, Forms, etc.	✓ Technical Training Activities	✓ Joint Sales Activities	✓ Accelerating Sales Activity
✓ Logistics	✓ Sales Planning and Targeting	✓ Customer Assessments	✓ Technical Service Development
✓ Introductions	✓ Initial Sales Opportunities	✓ Product Demonstrations	✓ Sales Forecasting
✓ Sales Introductions	✓ Systems Alignment	✓ Initial Customer Wins	✓ Communication Processes
✓ Initial Technical Training Plan	✓ Executive Alignment	✓ Product Delivery & Logistics	✓ Growth Strategies

Sample On-boarding Dashboard – Track Progress Through Phases
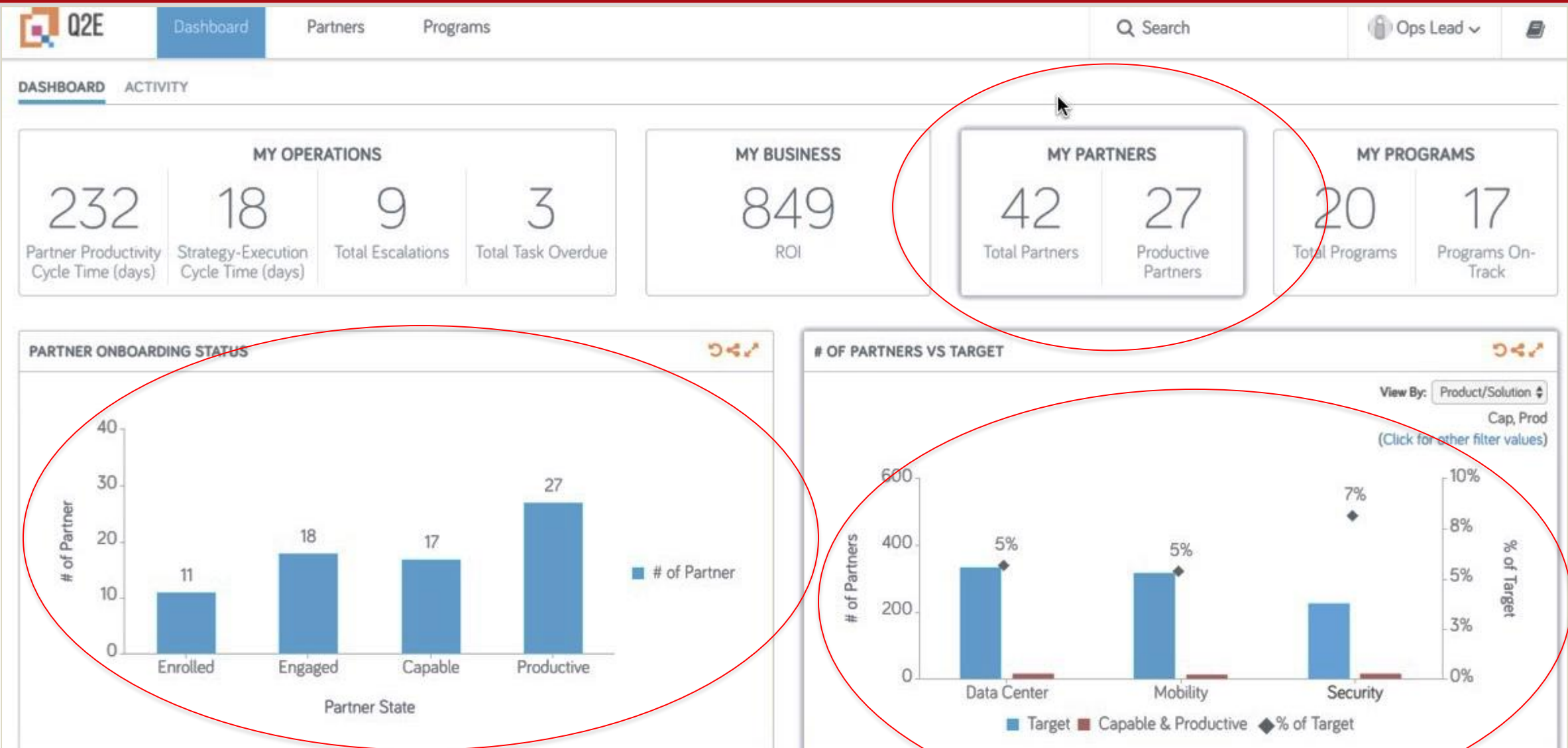
Check List – 30 Days

- ❑ 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

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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: *(Historically what % of partners recruited do not achieve **AT LEAST 80%** of the # of deals the Average Partner sells per year?)*	**30%**

CALCULATIONS	

Average Partner Productivity =
% of partners recruited historically that didn't make revenue expectations

$100,000

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

10

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

3

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

13

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

	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	$43,000
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

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Capacity Planning Worksheet

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.

In real life, for a full 12 month period, the Rule of 78s applies which provides exponential growth.

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)

Channel**Masters**

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"

- Traditional Resell Offering: ASP $50,000

- Managed Services Offering: ASP $1,000 per mo./per appliance

- Target market: SMB, upper mid market, departmental usage in enterprise customers

- 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 $3M+ and growing

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

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

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. Education & Support Benefits and Requirements

3. Marketing Benefits and Requirements

4. On-boarding Timeline with Milestones

5. 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?

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:
- 10 minutes to pitch (GET MANAGEMENT BUY IN!!)
- 2 minutes questions
- 3 minutes to score

Build the Partner Program & On-boarding Plan
Phase 2

Today's Meeting

Agenda:

Meeting Goal:

SAMPLE

➢ 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.
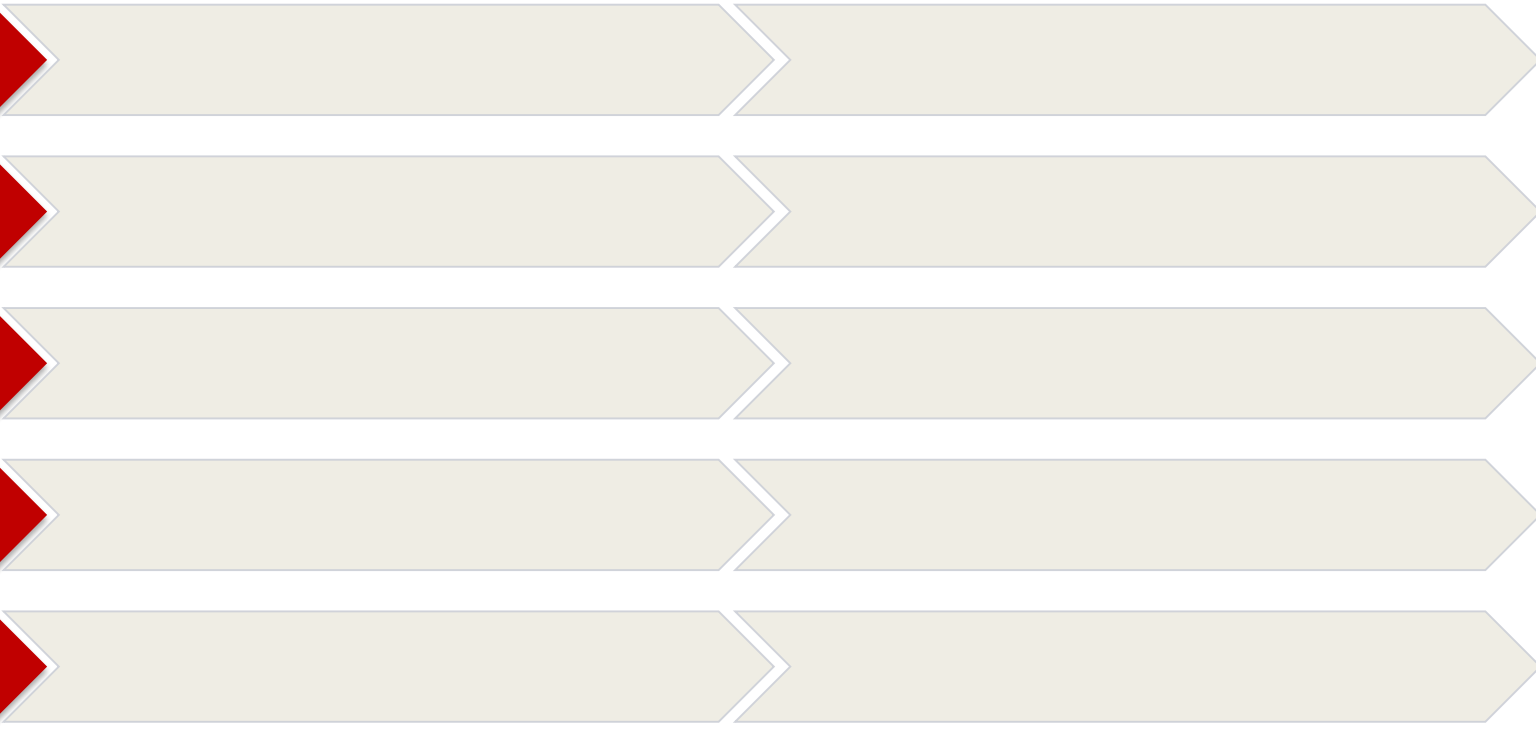
SAMPLE

	Give (program benefits):	**Get** (program requirements):
Education		
Support		
Marketing		
Sales		
Other		

On-boarding Timeline – Brand it
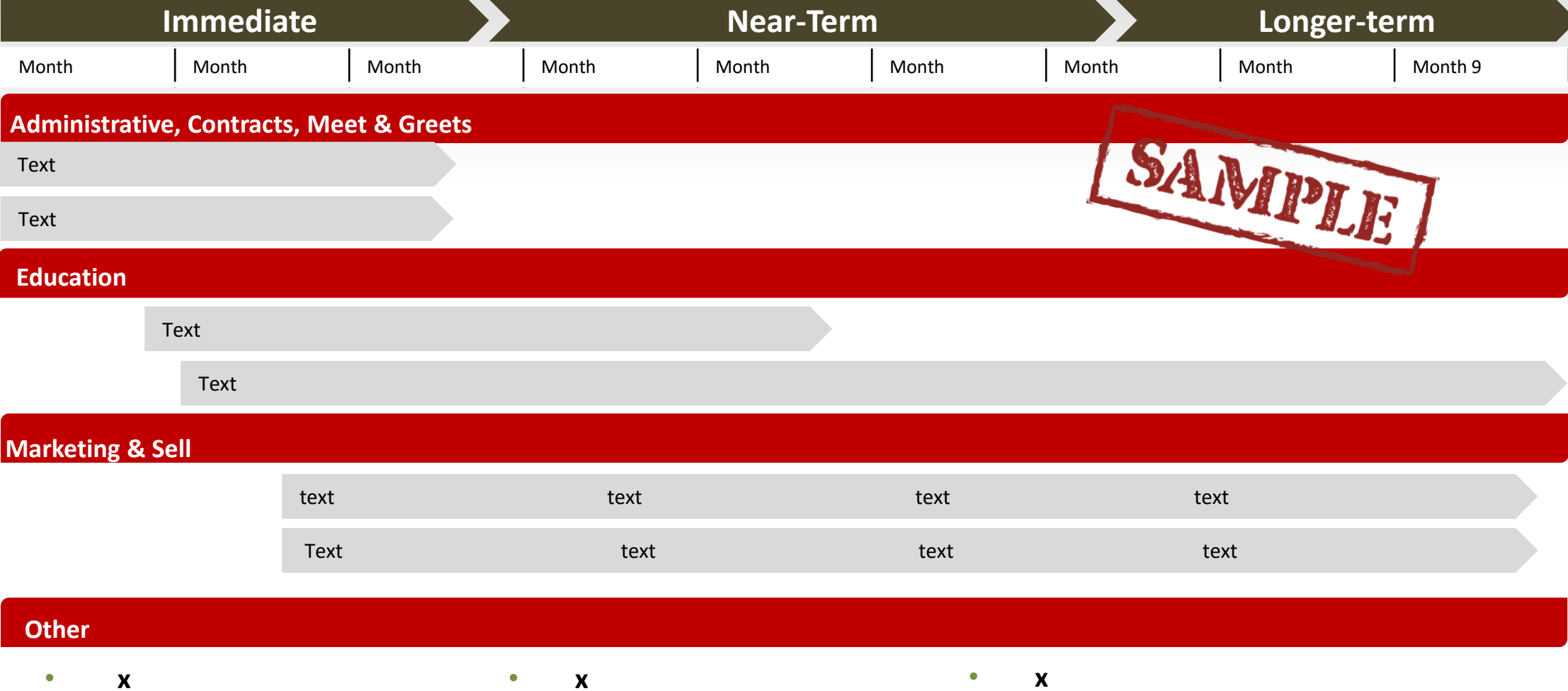
Immediate			Near-Term			Longer-term		
Month	Month	Month	Month	Month	Month	Month	Month	Month 9

Administrative, Contracts, Meet & Greets

Text

Text

Education

Text

Text

Marketing & Sell

text　　text　　text　　text

Text　　text　　text　　text

Other

- x
- x
- x

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

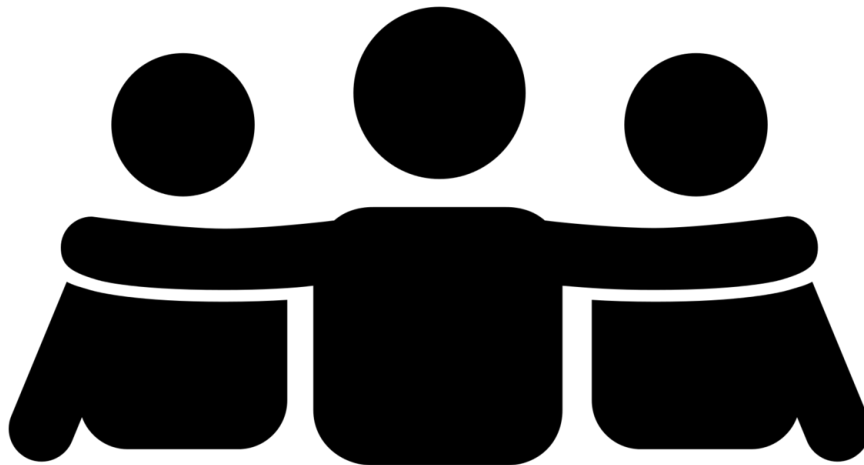| Activity	Goal	YTD	Notes
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Demo Unit	30		
Joint Business Plan	30		
MDF ($14K/partner)	$420K		
Marketing Activities (40/partner/year)	1200		
Joint Sales Calls (1/month/partner)	360		
Customer Wins	$10M		

Summary or Close

1. Do you support our plan?

2. These are our next steps

3. ?

Build Program Debrief

- ❖ Going from Budget 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?

ChannelMasters®

Open Discussion

Your Situations

Best Practices

But Wait!!

There's More!!