PHASE 3

Recruit a Partner to the Program

Field Recruiting Using the Partner Value Proposition

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		

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

Do You Remember What They Do to Make Money?

The mix of what they do at the corresponding gross margin dictates profitability.

- Listen
- Design
- Architect

Pre-sale

Sell

- Configure
- Price
- Deliver

- Implement
- Maintain
- Manage

Post-sale

ROI typically < 12 months

Product 5% to 40%

Project Services 21% to 67%

Managed Services 10% to 70%

Technology Line of Business
or Company
Sample Average Gross Margins*

IPED Channelytics Partner Profitability Study and Partner Interviews
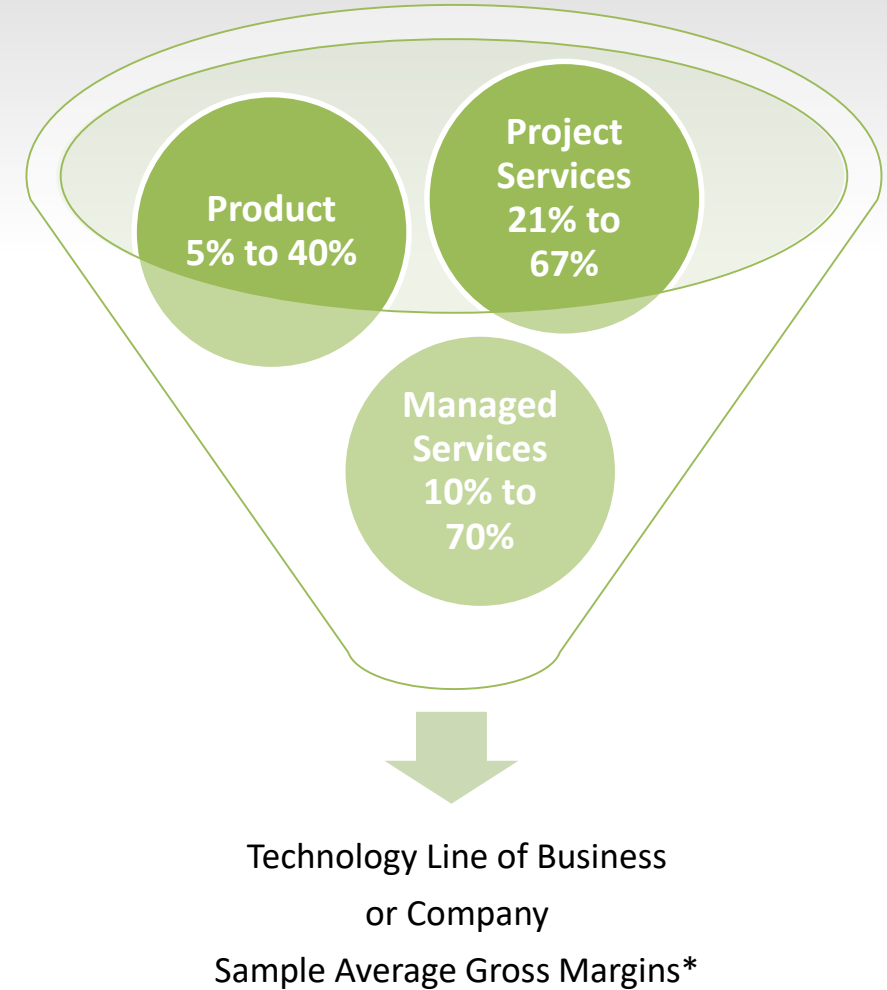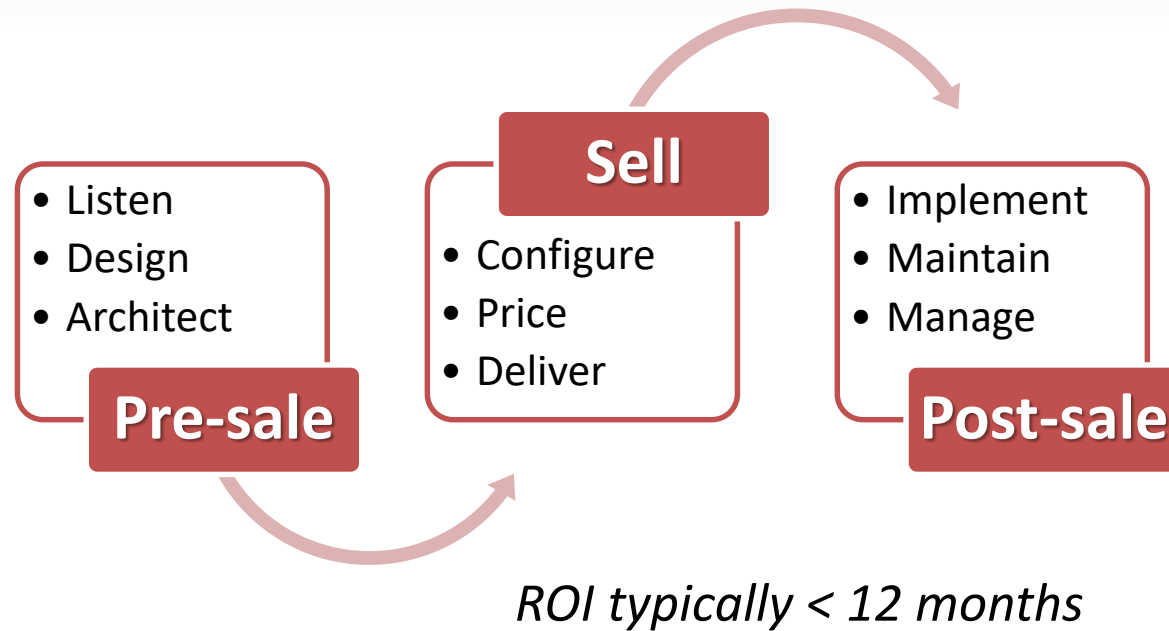
Do You Remember What They Do to Make Money?

Product Resale	**Commodity** (e.g. discounted laptop, etc.) 5%	**Complex** (e.g. Enterprise SW: BMC, Lenovo SW, ERP, etc.) 40%
Project Services	**Staff Augmentation** 21%	**Business Process** 67%+
Managed Services	**Resell Public Managed Service** 10%	**Own & Manage** 70%+

What do they need from you to develop capabilities & improve profitability around their core offerings?

Workshop Exercise:

- **Develop:** a recruiting presentation

- **Goal:** for your ideal solution provider to join the partner program you have just created

- **Medium:** live presentation to the panel

- **Situation:** you previously met and gained sponsorship for an executive team meeting

Note: Do not assume your audience understands the Customer or Partner Value Propositions from previous meetings.

Partner Value Proposition: Detailed View – Pick the Areas You Will Address

Simulation Phase 3

Category	The Questions Partners Ask = What's in it for them?
SOLUTION VIABILITY	• Do my Technicians vouch for it? • Does the product work? • Is it considered Best of Breed? • Is it an open solution with easy integration? • Would I bet my business on it?
CUSTOMER DEMAND	• What is the size of the target market? • What are the use cases? • How does it solve those business problems? • Are customers asking for it?
PROFIT POTENTIAL	• How hard is it to ramp up? • What are the GMs? • What are my costs to sell and support? • What investment do I need to make? • How long until I break even?
VENDOR CULTURE	• Can I trust vendor claims? • Is the vendor committed to the channel? • Does the go to market plan favor the channel?
SYNERGY & DIFFERENTIATION	• Will it set me apart from my competitors? • Will it allow me to become more competitive? • Does it offer the next adjacency to my current skills?

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Critical Knowledge for Phase 3

Now Articulate Your Value Proposition

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

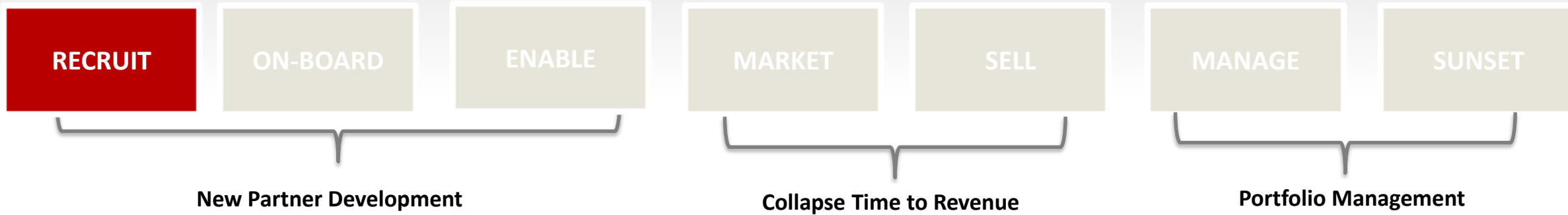**Collapse Time to Revenue**

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 Articulate Your Value Proposition

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As Well As "WHERE" They Are

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The Bottom Line

Always Be Visible	Reinforce Your Message	Demonstrate Your Value

1.5 MILLION Solution Providers

MAKE CHOICES EVERY DAY

Recruiting Starts with the Ideal Partner Profile: in this case VAR/MSP

Where to find partners…

Who Meet Your Profile → **Beyond your Profile; You Want Well Run Businesses**

For managed accounts or competitive win-backs or strategic partner recruiting:
- Channel Account Managers need to research the partner before recruitment call
- Indicate why that particular partner is attractive to your company… up front

- Partners positioned for success today and for the future…innovation and transformation

- Partners who can execute their business models and are accountable for results

- Partners who have mature / effective services practices

- Partners who target specific high-priority vertical segments

- Partners who have effective marketing / demand generation abilities

Value Proposition

Delivering the Value Proposition VAR-MSP View

A Partner's Assessment of Your Product & Program versus Other Choices

Solution Viability: Would I bet my business on it?	**Customer Demand:** Pull vs. Push?	**Profit Potential:** ROI on Education, Demo Sets, etc.	**Vendor Culture:** Go to Market with Channel?	**Synergy and Differentiation:** Am I the Correct Profile?

Is the product best of breed?

Does it integrate easily?

Is there sales momentum and customer desire for the product or service?

Is there a compelling case for ROI and profitability?

Is the go to market favorable to the channel?

Is trust established with the channel?

Are rules of engagement trustworthy?

Is there an obvious adjacency with current offerings resulting in synergy with my existing business?

Does this solution differentiate me from competitors?

Delivering the Value Proposition VAR-MSP View

A Partner's Assessment of Your Product & Program versus Other Choices

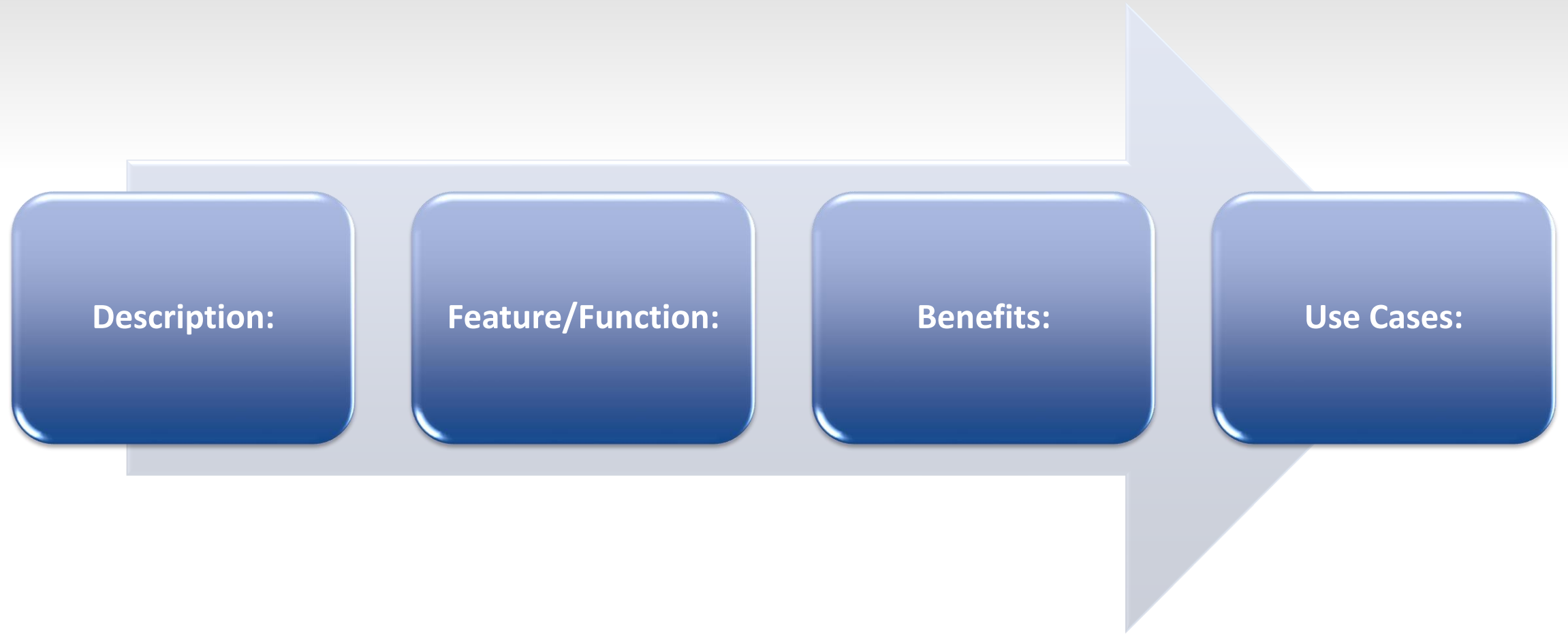| Solution Viability: Would I bet my business on it?	Customer Demand: Pull vs. Push?	Profit Potential: ROI on Education, Demo Sets, etc.	Vendor Culture: Go to Market with Channel?	Synergy and Differentiation: Am I the Correct Profile?

The goal is not to convince a partner to sell your product, but to recognize a mutually-beneficial business opportunity...
then commit to building the business together.
This is NOT a sales conversation, it's a **business investment conversation**. Your role is to help them see the opportunity and the beneficial synergies it brings to their business objectives.

Partner Value Proposition

- Describe **the Solution**
- **Customer Value Proposition**
- Show the **Profit Potential**
- Highlight the **Vendor Culture**
- Point to **Synergy & Differentiation**

You will create a PowerPoint presentation to Recruit a Partner

A Partner's Assessment of Your Product & Program versus Other Choices

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Solution Viability - Describe the Solution

Description:

Feature/Function:

Benefits:

Use Cases:

Solution Viability - Describe the Solution

Because Exadata Express runs the newest enterprise database release plus options, it gives you access to exciting new features of Oracle Database 12c Release 2. For enterprise database experience. You do not need to worry about network or storage configuration, patching, upgrade or other DBA tasks. These activities are managed for you by Oracle, so no customer DBA is required. Exadata Express gives you the same

Oracle Database Exadata Express Cloud Service is the ideal entry-level service for running Oracle Database in Oracle Cloud. It delivers an affordable and fully managed Oracle Database 12c Release 2 experience, with enterprise options, running on Oracle Exadata. It is a great fit for small and medium sized production databases as well as development, testing and evaluation environments. For developers, Exadata Express provides easy access to advanced development features of Oracle Database, enabling you to rapidly create modern data-driven applications.

Solution Viability - Describe the Solution

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Description:
- An ideal entry level service to run Oracle DB
- An affordable fully managed DB with enterprise options & Exadata

Feature/Function:
- Oracle DB 12c Release 2

Benefits:
- No DBA required
- No configuration
- No patching or upgrades

Use Cases:
- Production databases
- Development
- Test and evaluation environments

enterprise options, running on Oracle Exada   great fit for small and medium sized production databases as well   velopment, testing and evaluation environments. For developers, Ex data Express provides easy access to advanced development features of Oracle Database, enabling you to rapidly create modern data-driven applications.

MSP Consumes	Reseller Sells
• May use to host services • May place on-premise with a customer, but charge an MRR for the hardware	• Accommodates a customer's need for on-premise equipment • May resell as part of a solution that is not delivered as MRR

Welcome to Wolfpack Information Risk

A specialist cyber security company

DOWNLOAD COMPANY PROFILE

"We have an appliance solution called Wolf Pack. 13% of our revenues are HW but we place these on premise as part of our managed networking solution for our customers. We then try not to sell one time charge, typically we bundle hardware and software into the Monthly Recurring Revenue." (MRR).

HW as a Service

WOLF PACK

Partner Value Proposition vs. Customer Value Proposition

What's the Difference ???	Partner Value Proposition	Customer Value Proposition
Audience	Partner: assess relevance, odds of success and ability to make money.	• Partner: during recruitment visualizes which Customers have the solution/product need. • Customer: assesses need when the Partner sells solution
Answers the Questions	• What is the solution? • Customer Value Proposition? • What is the customer demand and market size? • What must I do to invest? • What is my likely return? By when? • Will I differentiate myself from my competitors? • Do I trust you/your company?	• What is the solution? Capabilities? • What business problem does it solve? • What is the demand ? • What are the use cases? • Who are the references?

What is a Customer Value Proposition?

- The **Customer Value Proposition** is required, though not always made clear in communications

    - *Vendors often stop at Feature, Function, Benefit*

- The **Partner Value Proposition** is not complete without a Customer Value Proposition

- Product Marketing is typically the source for Customer Value Propositions

- If you do not provide it; CAMs will make it up!!!

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Customer Value Prop

In a Perfect World, Break Even Would Accompany the Partner Value Proposition

Sample Break Even Analysis

Partners typically invest in technologies where they break even in less than 12 months!
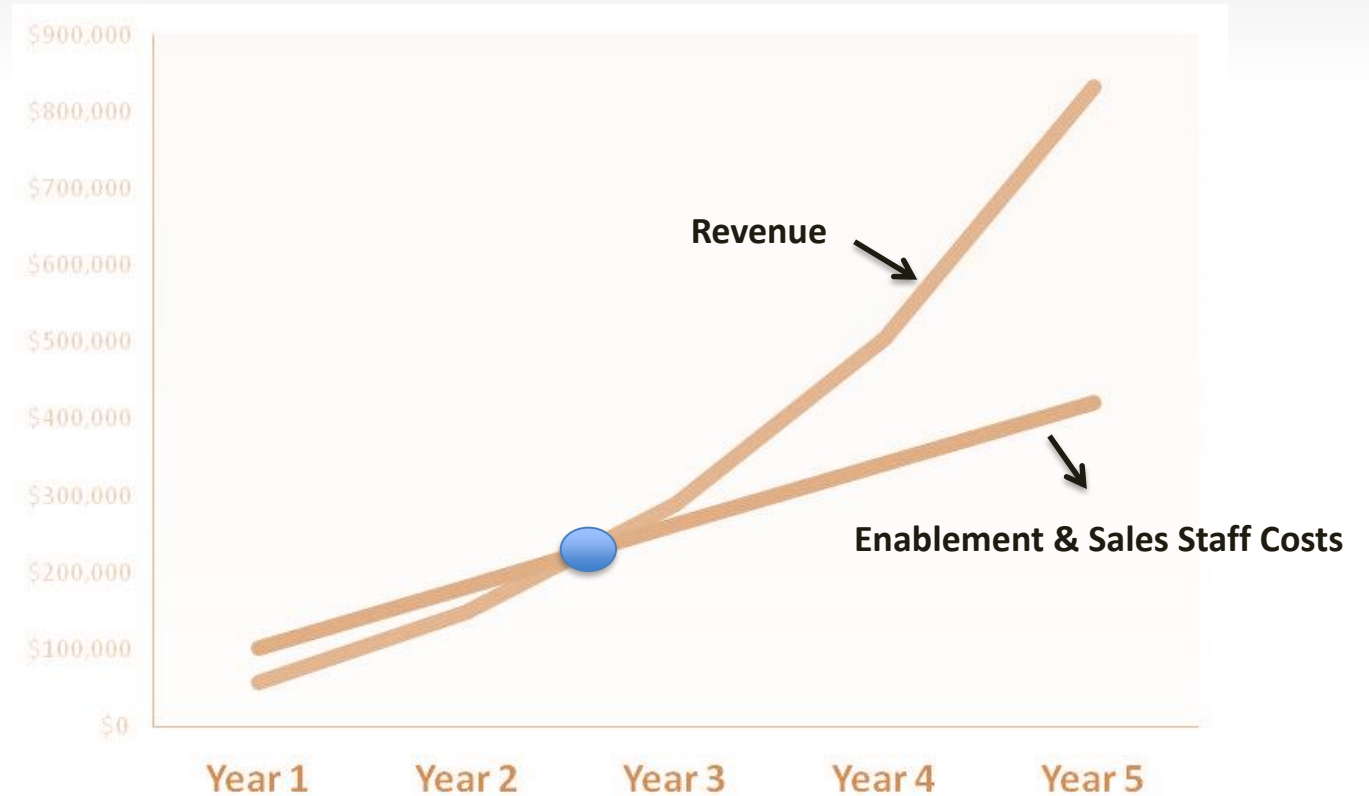
The data contained in this chart is illustrative

Time to Break Even Calculation…It's Simply Math

"I want you to invest…"

| Break Even in Months | | $\dfrac{\text{Opportunity}}{\text{Investment}}$ |
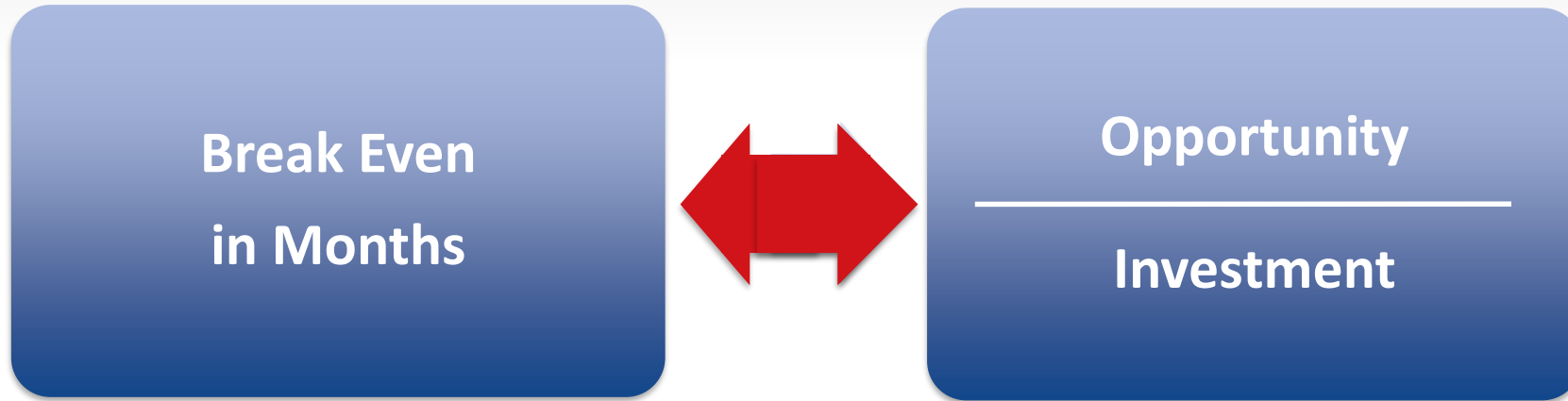
"I want you to invest…here's what's in it for you."

Opportunity

Investment

Qualitative:

- Innovative and reliable technology
- Brand strength & market presence
- Ability to differentiate in their markets
- Relationship with you, the Vendor

Quantitative:

- **Revenue and profits over a period of time projected by month**
- Incentives
- Program support & cost off-sets (sales, marketing, technical, service program benefits (GETS)

"I want you to invest…"

Opportunity

Investment

- Program fees
- Sales Training
- **Technical Training tuition & travel**
- **Technical Training opportunity cost (technical time lost billing @ maybe $200/hr.)**
- Certification & testing expense
- Marketing
- Demo Sets, etc.
- Incremental staff to be hired

Service Attach Rates for CloudOne from the Navigator Handbook

- **Average Sales Price 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

Product Resale Available at 25% Discount	CloudOne on Premise	CloudOne as a Service
CloudOne List Price	$50,000	$1,000/month

Profit Potential - Gross Margin Math: CloudOne

Gross Margins for Spreadsheet

SMB as a Service	Monthly or OTC	Monthly Revenue	OTC Revenue	GM	Monthly Profit	OTC Profit
Pre-sales consulting	na	0	0			$0
CloudOne Service ($1,000/month)	MRR	$1,000	0	25%	$250	
Implementation	OTC	0	$3,600	32%		$1,152
Managed Services ($550 @ 36 mos)	MRR	$550		42%	$231	
	Total Rev & Profit Est.	$1,550	.$3,600		$481	$1,152

Mid-market, Dept. Enterprise as a Service	Monthly or OTC	Monthly Revenue	OTC Revenue	GM	Monthly Profit	OTC Profit
Pre-sales consulting	OTC	0	$5,400	32%		$1,728
CloudOne Service ($1,000/month)	MRR	$1,000	0	25%	$250	
Implementation	OTC	0	$9,000	32%		$2,880
Managed Services ($550)	MRR	$550	0	42%	$231	
	Total Rev & Profit Est.	$1,550	$14,400		$481	$4,608

Mid-market, Dept. Enterprise On-premise	Monthly or OTC	Monthly Revenue	OTC Revenue	GM	Monthly Profit	OTC Profit
Pre-sales consulting	OTC	0	$7,500	32%		$2,400
CloudOne Appliance	OTC	0	$50,000	25%		$12,500
Implementation	OTC	0	$12,500	32%		$4,000
	Total Rev & Profit Est.	0	$70,000			$18,900

Assume 30 Day Lag from Sale to Revenue: use these or make your own assumptions!

Month	Activity	Revenue by Month
January	Staff, Target Accounts	none
February	Train & Sell	none
March	Close SMB service	none
April	Close SMB service	SMB service
May	Close Mid-market service	SMB service
June	Close Departmental Enterprise on prem	Mid-market service
July	Close Mid-market service	Enterprise on premise
August	Close Mid-market on prem	Mid-market service
September	Departmental Ent. on premise	Mid-market on prem
October	Close Mid-market on premise	Enterprise on prem
November	Close Mid-market on premise	Mid-market on prem
December	Close SMB service	Mid-market on prem
January	none	SMB service

Is this a Reasonable Scenario?

2 months
-Hire, Train, Sell

Then close one/month for 10 months
2 Enterprise On Prem
4 SMB as a Service
1 Mid-market as a Service
3 Mid-market on Prem

Investments: **Use existing reps**

No Sales Rep	$125,000 fully loaded full time $10,417/mo
Tech Education Opp Cost	$4,800 $1600/day @ 3 days
Marketing	$5,000 MDF, two increments available, matched $ set aside in case asked to match

Waive MDF matching $ requirement if ROI is too long

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Profit Potential: MacroSoft CloudOne ROI

Chart spreadsheet →

|	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan
Jan Hire, Train, Sell													
Feb Sell													
Mar Sell, Close													
Apr Sell, Implement, Invoice/SMB Serv, Close				$1,618	$481	$481	$481	$481	$481	$481	$481	$481	$481
May Sell, Implement, Invoice/SMB Serv, Close					$1,618	$481	$481	$481	$481	$481	$481	$481	$481
Jun Sell, Implement, Invoice/MM Serv, Close						$5,068	$481	$481	$481	$481	$481	$481	$481
Jul Sell, Implement, Invoice/ent on-prem, Close							$18,900						
Aug Sell, Implement, Invoice/MM serv, Close								$5,068	$481	$481	$481	$481	$481
Sep Sell, Implement, Invoice/ MM serv, Close									$5,068	$481	$481	$481	$481
Oct Sell, Implement, Invoice/Ent on-prem, Close										$18,900			
Nov Sell, Implement, Invoice/MM sserv, Close											$5,068	$481	$481
Dec Sell, Implement, Invoice/Ent on-prem, Close												$18,900	
Jan Sell, Implement, Invoice/SMB Serv, Close													$1,618
Monthly Gross Margin $				$1,618	$2,099	$6,030	$20,343	$6,511	$6,992	$21,305	$7,473	$21,786	$4,504
Monthly Investment Costs $	$4,800	$5,000	$0	$0	$0	$0	$5,000	$0	$0	$0	$0	$0	$0
Use existing sales reps													
Education opportunity cost	$4,800												
MDF Match		$5,000					$5,000						
	$4,800	$5,000	$0	$0	$0	$0	$5,000	$0	$0	$0	$0	$0	$0
Cum Gross Margin $	$0	$0	$0	$1,618	$3,717	$9,747	$30,090	$36,601	$43,593	$64,898	$72,371	$94,157	$98,661
Cum Investment Cost $	$4,800	$9,800	$9,800	$9,800	$9,800	$9,800	$14,800	$14,800	$14,800	$14,800	$14,800	$14,800	$14,800

Gross Margins →

← Investment

In a Perfect World Break Even Would Accompany the Value Proposition
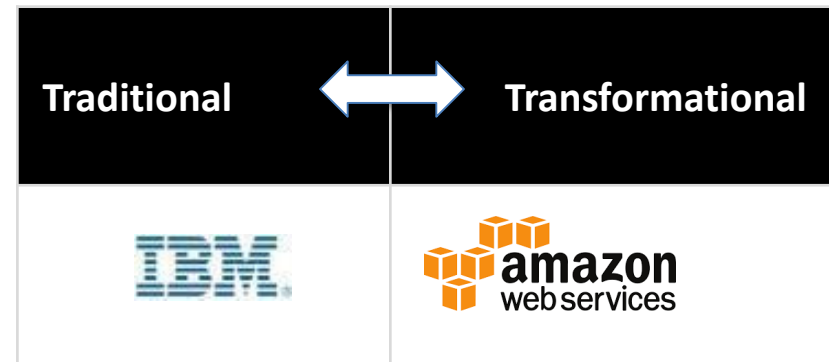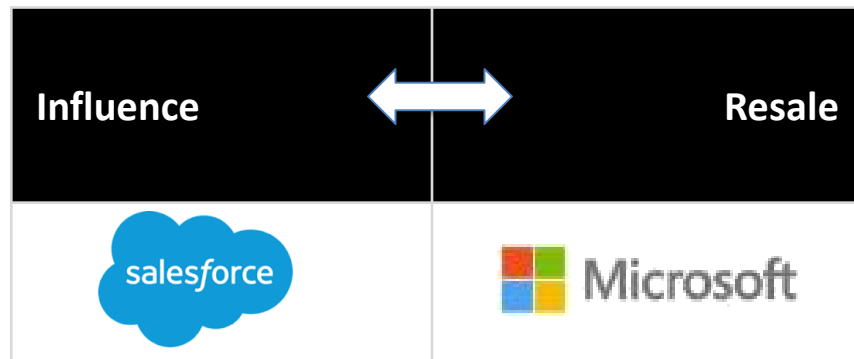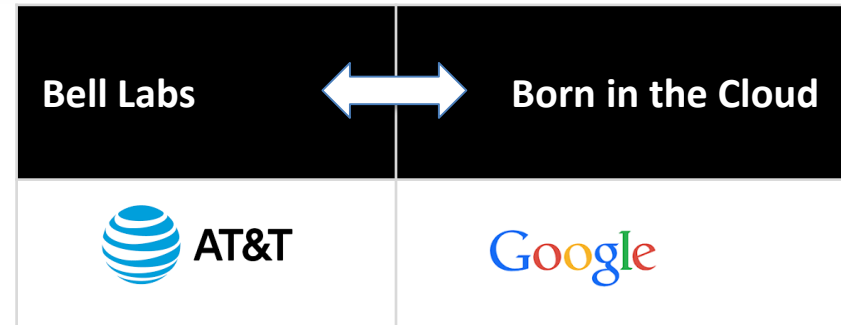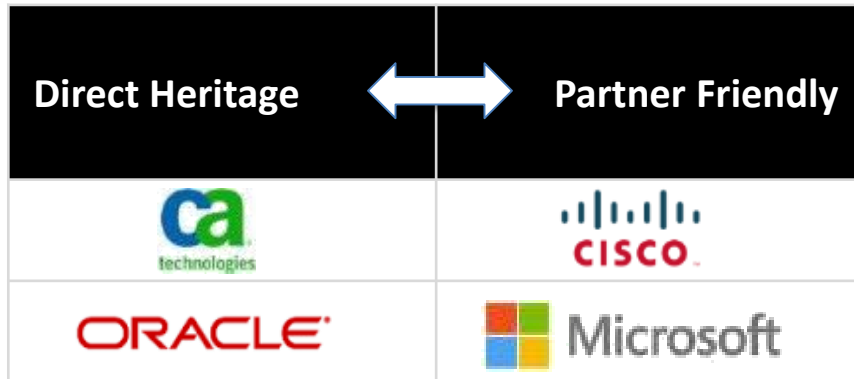
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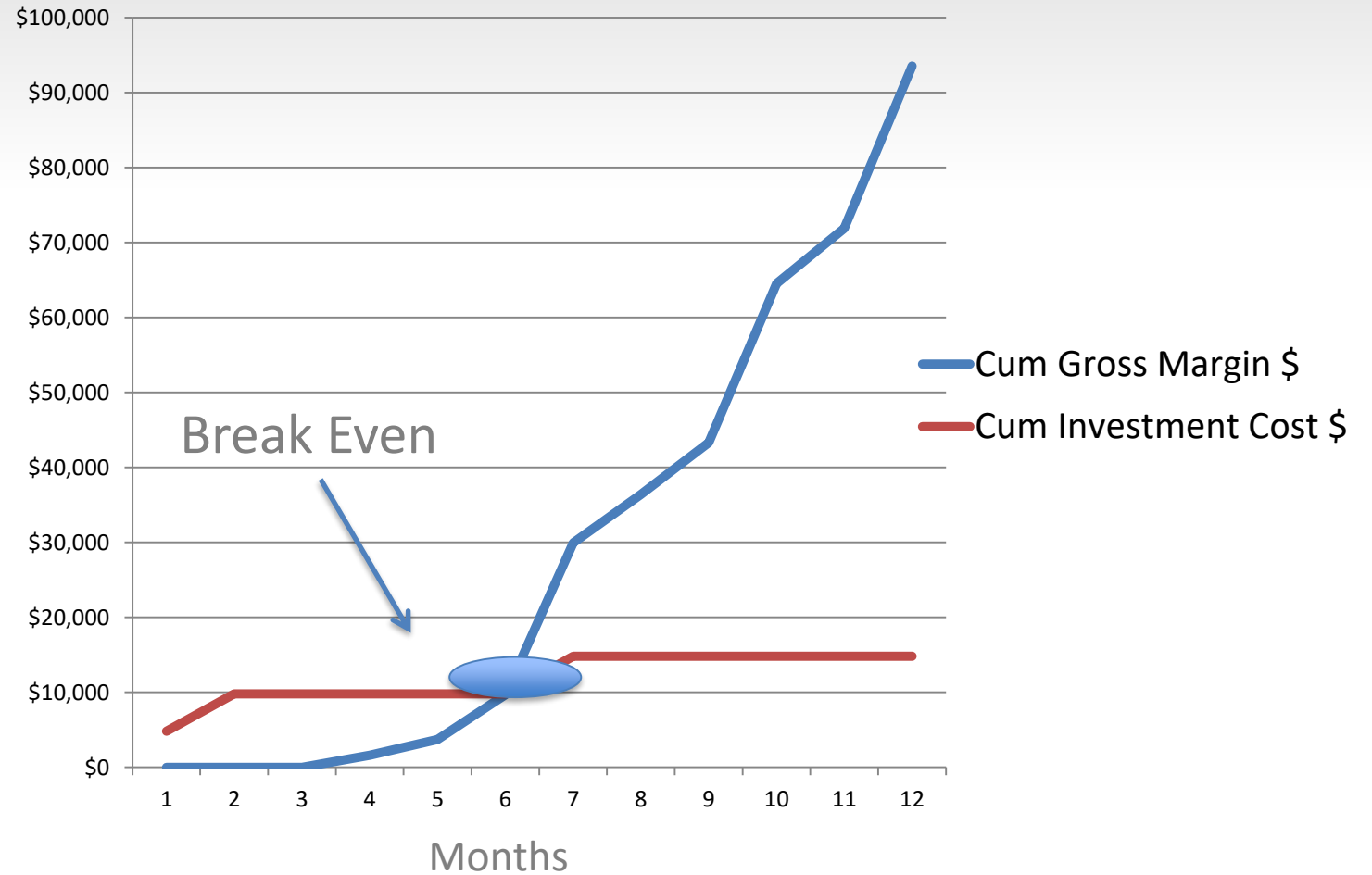
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Vendor Culture

Category	The Questions Partners Ask = What's in it for them?
VENDOR CULTURE	• **Can I trust vendor claims?** • **Is the vendor committed to the channel?** • **Does the go to market plan favor the channel?**

Direct Heritage ⟷ Partner Friendly		Bell Labs ⟷ Born in the Cloud	
ca technologies	**CISCO**	**AT&T**	Google
ORACLE	**Microsoft**		

Influence ⟷ Resale		Traditional ⟷ Transformational	
salesforce	**Microsoft**	**IBM**	**amazon** webservices

Synergy & Differentiation

Category	The Questions Partners Ask = What's in it for them?
SYNERGY & DIFFERENTIATION	• **Will it set me apart from my competitors?** • **Will it allow me to become more competitive?** • **Does it offer the next adjacency to my current skills?**

IPED Adjacencies?
In which programs do your targets participate?

Operational
- ☐ Vertical Expertise
- ☐ Site Surveys
- ☐ Cabling
- ☐ Edge Sensors
- ☐ MRO

Industrial
- ☐ Operational Stack
- ☐ Point Solutions, e.g. SCADA
- ☐ Purdue Model
- ☐ Electrical – Mechanical – Chemical Engineers, etc.
- ☐ Circuit Design/Build
- ☐ IoT Platform Dev.

Applications
- ☐ Office 365, ERP/SCM, Vertical, etc.
- ☐ DevOps, Containers
- ☐ AWS, Azure Dev/Production
- ☐ IoT Platform Dev.
- ☐ Business Intelligence (BI)

Telephony
- ☐ On-prem PBX
- ☐ Cabling, Batteries
- ☐ Wireless
- ☐ Unified Comms
- ☐ Voice & Data
- ☐ Managed PBX

Networking
- ☐ Routers, Hubs
- ☐ Security
- ☐ SDN, SD WAN
- ☐ Unified Comms
- ☐ Comm as a Service

Data Center
- ☐ Servers
- ☐ Storage
- ☐ Systems Mgt. Software
- ☐ VDI, Business Intelligence (BI)
- ☐ IaaS, BDR, etc.

Blue indicates Recurring Revenue
Blue in Stack heading indicates IT Capabilities
Red in Stack heading indicates OT Capabilities

"How am I different than every other Cisco Gold?"

IPED® Consulting

The First Program is One Without Tiers nor Tracks.   You Are, however, Recruiting "Managed" Partners at this Early Stage.

Charter Partners

VAR, MSP OR HYBRID
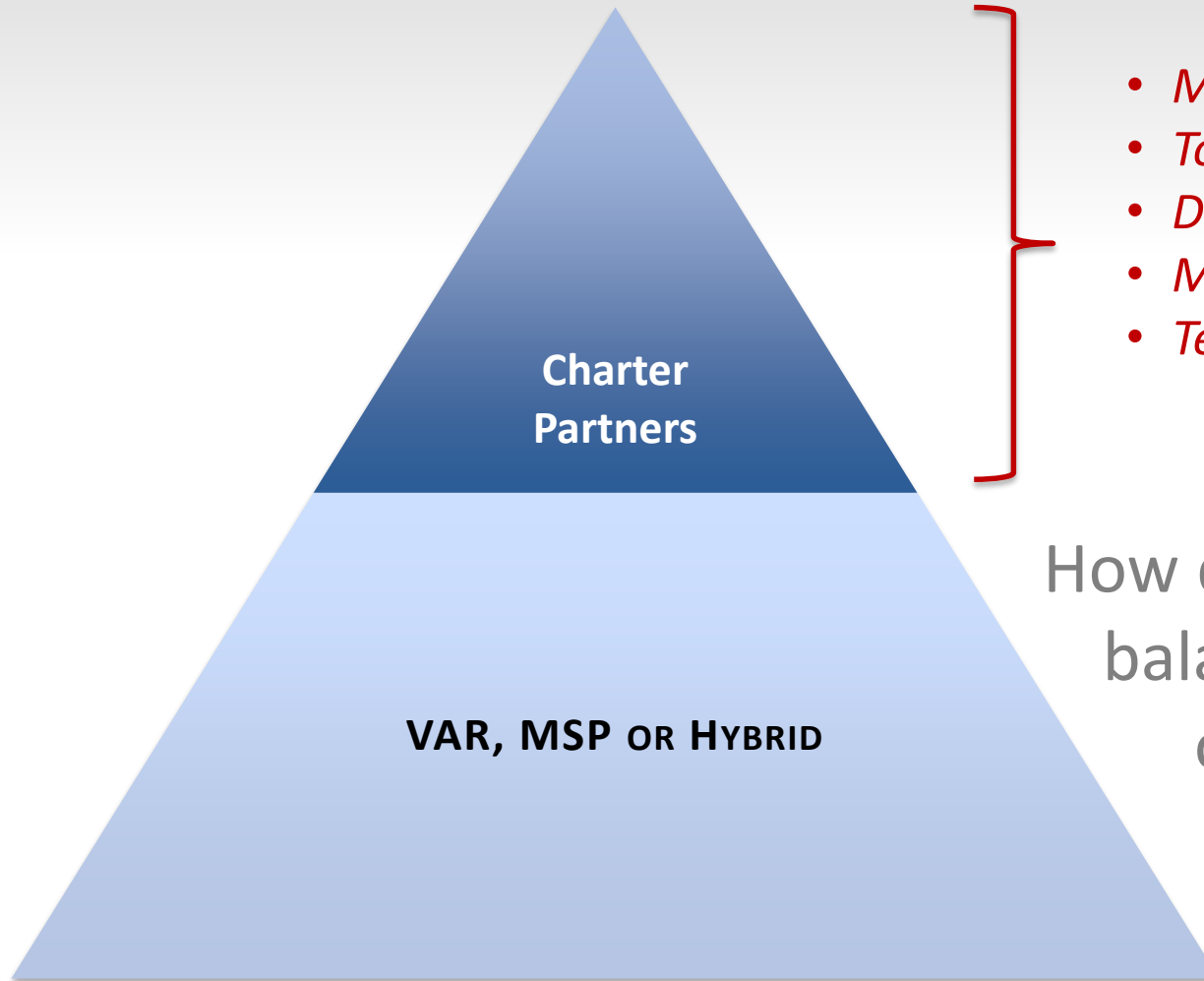
- *Managed Partners*
- *Top group to start*
- *Designated CAMs*
- *May write business plans*
- *Tend to have high value contact with MacroSoft*

How do these Partners differ from the balance who will join the program over the next several years?

Team Workshop

Recruit a Partner to the Program

Sample Value Proposition

Cloud One Appliance

MacroSoft

Today's Discussion

MacroSoft CloudOne Appliance

➡️ **The Market**

➡️ **Partner Opportunity**

➡️ **Our Investments**

➡️ **Getting Started**

SAMPLE

Describe the Solution

| Description: | Feature/Function: | Benefits: | Use Cases: |

Description:

Benefits:

KEY SOLUTION FEATURES:

-
-
-
-
-

Do You Have Customers with These Needs?

_____

_____

_____

_____

SAMPLE

Describe the Market

Indicate:

Market size _____

_____

Growth rates _____

_____

Describe:

Target buyers _____

_____

Competition _____

_____

MacroSoft go to market plans _____

_____

_____

The Opportunity

For partners who meet the Ideal Partner Profile, lay out the opportunity.

Describe how the box can be placed on-premise via resale/managed service or how it may be consumed by the partner for a managed service.

CloudOne product revenue and gross margins for both On-premise and As a Service model

Answer how adding offerings that leverage this appliance might differentiate this partner from others who don't offer this appliance or solution? (optional)

Pre- and post-sales project based services, and/or additional managed services when CloudOne is sold as a service

Please use your skills to title appropriately

SAMPLE

Our Program Investment

Partner requirements (What we Get):

_____

_____

e.g. **Requirements**: what you must invest

Partner benefits (What we Give)

-

-

-

e.g. **Benefits**: what I, the vendor, will provide

Single-tier channel ready solution: that offers the partner the opportunity to: _____

Capture new customers or grow MRR or build a managed offering or ??_____

_____

Please use your skills to title appropriately

SAMPLE

Financial Summary of Investment & Return to the Partner

Pull in your ROI spreadsheet and financial assumptions around how many deals they can close in 12, 18 or 24 months.

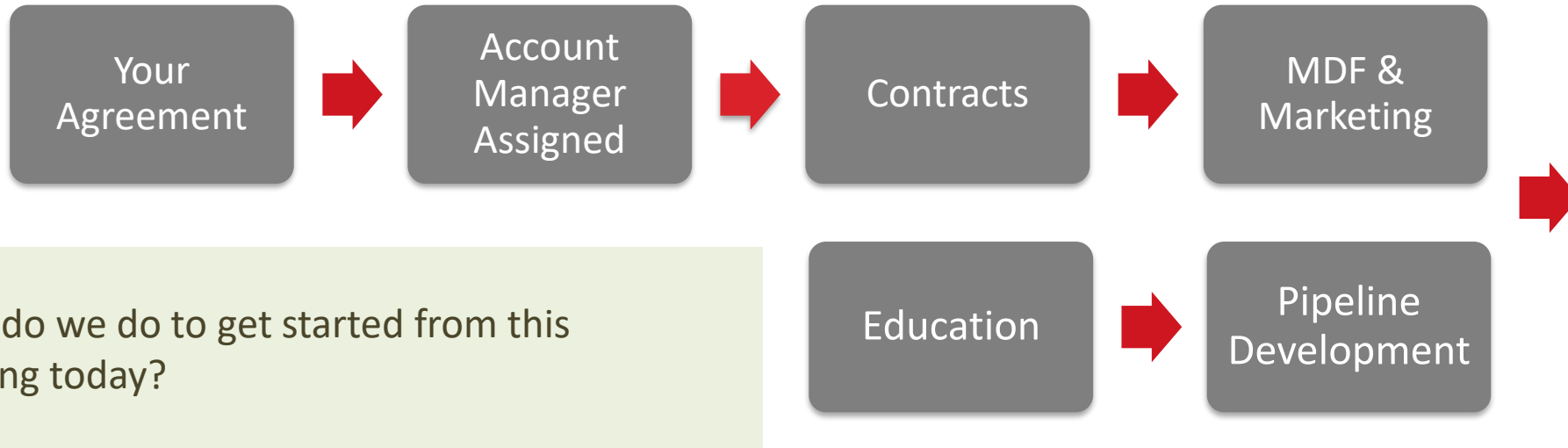Calculate a Break Even analysis if you have time.

SAMPLE

Please use your skills to title appropriately

Getting Off to a Fast Start

Today!   **30 Days!**

SAMPLE

| Your Agreement | → | Account Manager Assigned | → | Contracts | → | MDF & Marketing | → |

What do we do to get started from this meeting today?

| Education | → | Pipeline Development |

Please use your skills to title appropriately

Your Solution Provider Panel… in Real Life

Ray Ribble

Managing Partner

Phillip Walker

Customer Advocate CEO
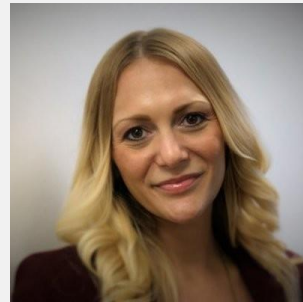
Jennell Mott

VP of Cloud &
Vendor Operations

Dave Cunningham

Business Technology Officer

Matt Matthews

President

Open Discussion

Your Situations

Best Practices

But Wait!!

There's More!!

Partner Program Development Topics We Don't Have Time to Address

- Affinity Alliances

- Two Tier Distribution

- The role of Service Providers in Two Tier Distribution

- Trends in Routes to Market usage

- Real Life Examples of Role based Programs, Converged Infrastructure, Cloud Programs, Services IP for Partners to Fuel Services Capabilities, Born in the Cloud Program

- Tiers and Levels: Three versus Four

- Graduation to higher tier levels

- Consolidation resulting in Broad Product Lines offering Cross Sell opportunities

- Ease of Use in Single sign-on, single brand with multiple tracks by business model or role

- Tiered vs Role based discounts

- Incentives

- Global considerations

- Feedback loops: CAM, Advisory Councils, Road Shows, Roundtables

- Program transformation history: Revenue, Points, Specialization/Certification, Role

- PRM

- Forecasting and access to POS through Distribution

For Folks Back Home…

What We Don't Do at Channel Masters

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		

Field Execution is where the Rubber Meets the Road, Beyond the On-boarding and Ramping, Business Planning comes into Play

Channel Account Manager Training: The Business Plan

The Partner Business Plan

A jointly developed plan resulting in an understanding of your partner's revenue mix, investment with competitors, enablement plans, marketing plans and organization. Share of wallet and clear revenue commitments are two critical.

Revenue & Opportunity Planning

Optional: A jointly developed opportunity worksheet identifying the top opportunities for immediate engagement to close.
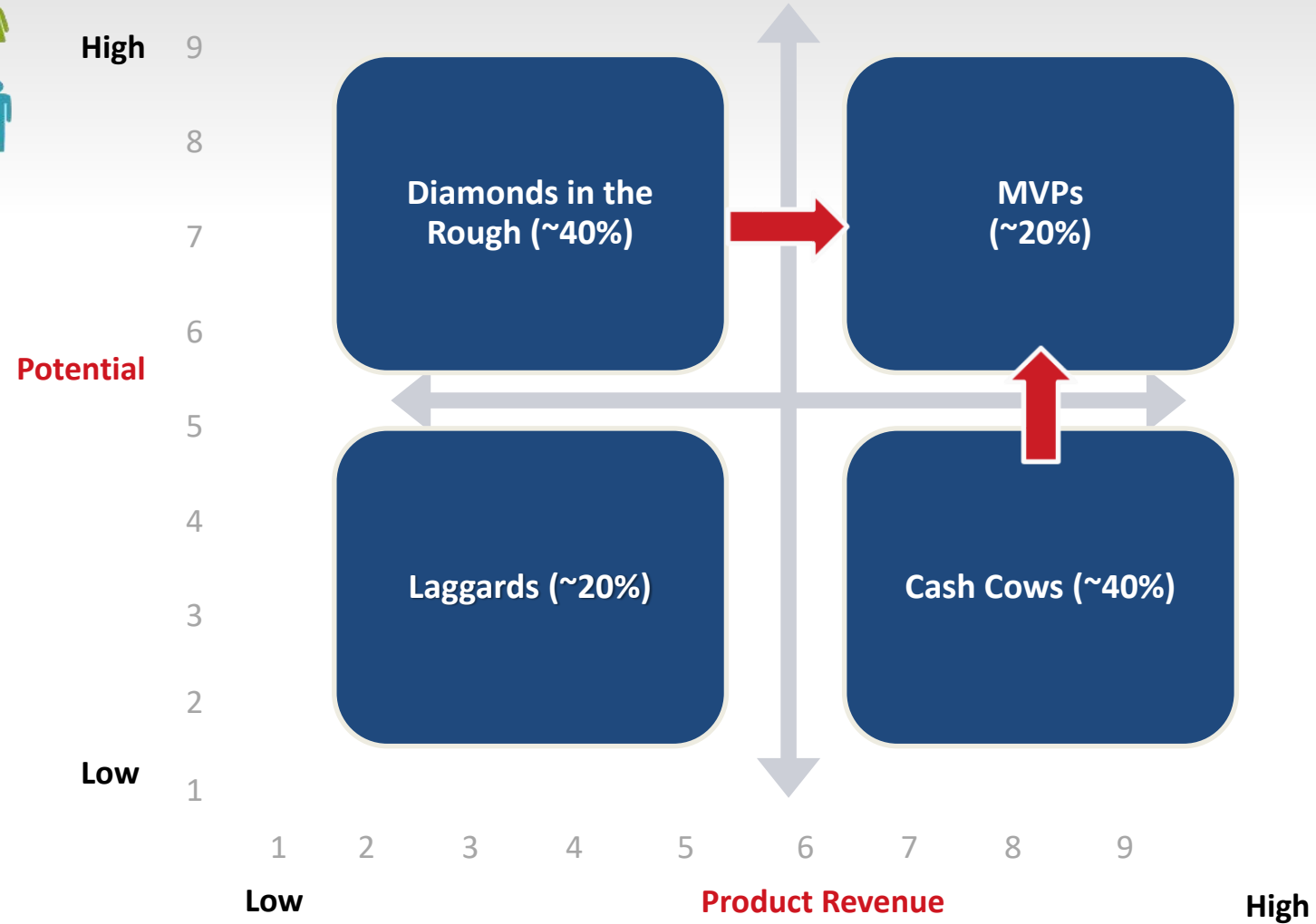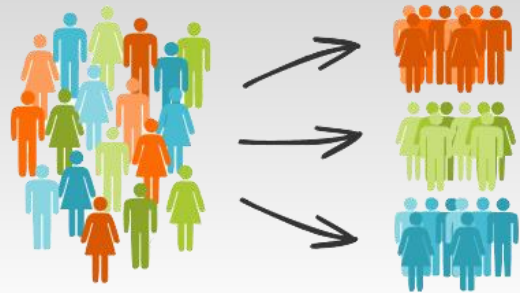
The Quarterly Business Review (QBR)

A structured, quarterly meeting to review progress against quarterly goals set out during the annual Business Plan.

The Call Plan

A structured Partner call preparation template (may be reduced to a checklist) to maximize the effectiveness of your partner call. Clearly prepare your stated goals, anticipate objections, prepare objection handling tactics.

Segmenting Partners Indicates Which to Prioritize for Business Plans

High 9

8

7

Potential 6

5

4

3

2

Low 1

Diamonds in the Rough (~40%)

MVPs (~20%)

Laggards (~20%)

Cash Cows (~40%)

1 2 3 4 5 6 7 8 9

Low   **Product Revenue**   High

Capacity Planning Templates Help Identify How Many Partners are Required for Recruitment

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

CALCULATIONS	

Average Partner Productivity =
Product average selling price (ASP) * number of deals partner can sell/year

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)

Thank You!

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