


Building a Successful Channel Program

A Roadmap




A group of people are gathered around a table in a meeting. They are looking at documents and a laptop. One person is pointing at a document. The background is slightly blurred, showing a modern office environment.

Partners are a vital component to many of today's sales models, and the right partner program can have a significant impact on the bottom line.

But building a successful program takes careful planning, and creating a detailed plan can seem daunting—whether you currently have a program or are just starting.

This roadmap ebook has been designed to help you navigate the creation of your plan, and will layout the steps required to build a solid foundation for a success partner program.

STEP 1: Determine Your Goals & Objectives



You won't get very far with your partner program if you don't know where you are going.

The first step to a successful channel program involves identifying your key program objectives. This is the “what” of your program:

- What do you want and need your Partners to do?
- What do your Partners want and need from you?

Determining these pieces will take some thought, but you must clearly define what your program goals actually are before you ever get going. This can be one of the hardest things to do and stick with.

A few program objectives to consider:

- Realistic and measurable financial program goals
- A partner onboarding and training plan (this doesn't have to be formal)
- Partner retention and engagement metrics
- A partner communication commitment

Keep in mind that all your program objectives need to be realistic and measurable. Once you create the objectives, make sure you flush out the details and components of each objective to ensure they are in line with you and your Partners' business goals.

The clearer you make your objectives from the beginning, the easier it will be for your Partners and your internal team to be successful with.

STEP 2: Look Around

You are not the first person ever tasked with building out a partner program. Fortunately, there are thousands of successful partner programs in place around the world today.

These programs come in all different shapes, sizes, and flavors. It is likely that there are programs out there that look similar to what you have in mind for your Partners.

Whether you are just getting started, or looking to overhaul and expand your existing program, take the time to look at the elements of the successful programs around you. Identify the program components that align with your goals and program's maturity level and use that as the foundation for your program.

- Research those other programs and learn what you can from them. Identify the components of your program that will need to compete with the other programs in your market.
- Leverage the experience of other channel managers to understand best practices that you can adopt into your own program. Just as importantly, learn from their mistakes. Don't be afraid to reach out for advice. Professionals like to talk about their experiences.
- Ask Partners what they need to be successful and how they want to work with you.

Armed with the details of what is going on in the market and partner expectations you will have identified many of the components your program will need to have for success.

STEP 3: Set Expectations

Partners want to know how to engage with you and what to expect. Without those expectations set, there is no accountability for anyone, and the chance of failure is much greater.

It is critical to document your program parameters upfront. Do you expect them to register deals in your PRM? What are your requirements for gaining MDF? How much support should they expect from you during a deal cycle? Is there training partners have to complete? Having a clear set of rules of engagement for your program will set expectations for everyone.

Balance is a key component to build into your process. Make sure that your program does not become one sided. Both your Partners and your company should benefit in the partnership somewhat equally.

Expectations are important for both partners and internal staff. Consider:

- Program membership and deal registration requirements and benefits
- Engagement and training expectations
- Internal partner response times
- Other critical program element details

Ensure you have the technology and processes in place to manage the expectations you place on you and your partners. And don't be afraid to adjust expectations if you find there are either too many for Partners to realistically follow, or that you are unable to manage them.



STEP 4: Recruit the Right Partners

You've figured out what you want from your program, and how to set expectations. Just as critical is having the right Partners. Not all Partners are created equal and having a smaller number of high performing Partners is always going to move your program forward more successfully than a big number of Partners that only looks good on paper.

When determining your ideal partner profile, consider assessing the following components:

- Industry expertise
- Competing or complementary technologies currently sold
- Regional or geographic coverage
- Sales and marketing model
- Existing customers (who may be your target accounts)

Build out your partner profile with the elements that make sense for your program. Recruit with those items in mind and then measure success. Don't be afraid to adjust things over time if you do not see the results you are looking for.



STEP 5: Communicate

Executing a successful partner communication plan starts with understanding what your Partners need from you, when they need it, and how they need to receive it. Today's technology provides various options for partner communication, with each method having advantages and disadvantages.

The following components will start you on the right path:

Communicate with your Partners early and often. This means creating a partner communication plan to prioritize communications. This plan should align with your internal communication plan and will help you identify what Partners need and when the communication should take place. Proper planning will ensure your Partners have what they need when they need it.

Use multiple methods of communication. There is no one communication method that will get the job done with your Partners. A combination of email, personal contact, and a portal updated regularly will help you ensure your messages are received loud and clear.

Create Partner specific communication benefits. There is nothing worse than Partners hearing an update on a new offering for the first time when a customer asks for it. Early access to your product or solution detail can be a great benefit to being part of your program. Use early communication as a hallmark of your true partnership.

Leverage technology where it makes sense. Is your portal user-friendly and inviting for Partners to use? The right technology doesn't replace direct communication with Partners, but it can enable you to focus your one-on-one time with more strategic work rather than content distribution. Assess what technology, like a partner relationship management (PRM) solution, can help you execute the above three points.

check out our ebook "[5 Keys to Building Strong Relationships in Channel Marketing](#)" for more on effectively communicating with partners.

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Be a Consummate
Influencer with
Partners.

At the end of the day,
I think it's about the
relationship. As long
as they know that
I'm on their side and
trying to help their
business, and help
them grow, they are
going to want to do
the same for me.

”

Tony Lizza
Director, International Channel Sales
Security Innovation



THIS IS
THE SIGN
YOU'VE BEEN
LOOKING FOR

STEP 6: Look at the Numbers

The one thing you can always count on in your partner program are the numbers, so use them. As they say, they never lie. Identify the partner data you need, figure out how to report on it, and look at it often.

The more familiar you are with your partner data, the easier it will be to identify trends within your program. Spend time on a regular basis assessing what is working and what is not and make the necessary adjustments. Again, understand if a PRM solution can help you centralize your data collection and reporting.

Use partner data to analyze:

- **Partner engagement** This could include a few things: interaction with content and communication, responsiveness and training, and onboarding completion.
- **Revenue and lead generation** If Partners are not producing, find out why. This could be an indicator that something is off course with your program. Look for trends among your successful and unsuccessful Partners and leverage that data for positive change.
- **What you're doing right, and what needs to be adjusted** Ask your Partners for their opinions and get their feedback regularly. Giving your Partners a voice in your program will keep you from operating in a silo and ensure your efforts are focused on the things they really need.

When it comes to building out your partner program, starting with a strong foundation is the key to success.

Focus on building out your program fundamentals and allowing time for them to work before changing things up and bringing on additional elements. Set internal and Partner expectations up front to avoid moving targets and frustrations.

These steps will help you keep your team and your Partners in sync and focused on your program goals and objectives.



Growing your Channel Program? Explore Channeltivity.

Channeltivity is a partner relationship management software platform that helps companies build strong relationships, optimize partner productivity and support new sales.

The Channeltivity platform is used and recommended by many channel programs to deliver effective and engaging partner training.

Channeltivity is easy to use, is fast to set up, and connects to Salesforce.com.

To find out why 20,000+ channel sales professionals around the globe depend on us, and to experience the solution through our hands-on demo, call 877-226-2564 or visit <https://www.channeltivity.com>