



Partner Marketing Concierge Best Practices Guide



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A Letter from the CEO

The Leader in Unified Channel Management



Dear Channel Professional:

Thank you for picking up this booklet on partner marketing concierge (PMC) best practices. We at ZINFI have been privileged to work for major Fortune 1000 companies worldwide to drive their channel programs globally. Over the past decade, we have learned what works and what doesn't. This booklet is a brief summary of some of those lessons learned for successful partner marketing concierge program management.

There is no doubt that channel management is complex. However, it's made more complex when it is managed through a set of tools and systems that are disjointed. In many organizations, channel management systems actually consist of an array of diverse systems that have evolved over a long period of time. As a result, most companies today trying to implement a unified approach to their channel management struggle to make it work and get a decent ROI. In order to build a high performing channel, it is essential to optimize channel management end-to-end. ZINFI's vision is to enable our customers to optimize their channel end-to-end via our Unified Channel Management (UCM) platform.

A Unified Channel Management (UCM) platform comprises of three core sets of processes:

1. **Partner Relationship Management (PRM):** Ensure the interaction between the organization and its partners is fully optimized and true channel potential is achieved by aligning training, programs and incentives.
2. **Partner Marketing Management (PMM):** Enable a partner to generate qualified leads in business-to-business and business-to-consumer segments by leveraging a set of pre-designed, ready-to-go assets, campaigns and programs.
3. **Partner Sales Management (PSM):** Enabling channel sales organization, as well as partners, with a set of necessary sales tools, methodologies and process steps to maximize closing at a substantially lower cost.

Development, roll-out and optimization of these three core sub-processes (PRM, PMM and PSM) result in world-class Unified Channel Management. When achieved, organizations not only generate more revenue at a lower cost, but also build a sustainable global advantage.

The successful roll out of a Unified Channel Management (UCM) platform also depends on an accompanied roll out of Partner Marketing Concierge (PMC) capabilities. Channel partners are incredibly busy and do not have the extra time to go through each of their vendor's new channel program and platform. While the automation you deploy needs to be super easy to use, but that is not enough. Since partners do not have in-house marketing resources and expertise, an organization rolling out channel marketing automation truly needs to deploy partner marketing concierge capabilities.

This booklet focuses primarily on various aspect of channel marketing automation and partner marketing concierge capabilities needed. We encourage you go through the various best practices articles, we hope you will walk away with pragmatic ideas that you can start implementing today to make a sustainable difference in your organization.

As always, if you need help, have any questions or need more information don't hesitate to contact us anytime.

Cheers!

Sugata Sanyal
Founder and CEO



How This Book Is Organized

This booklet is divided into five sections, Sections I & II cover an introduction and an overview of Unified Channel Management.

Section III is focused on channel marketing automation covering various aspects of how it has evolved over the years to where it is going, and what you need to do to empower your country teams to leverage channel marketing automation.

Section IV explores various aspects of partner marketing concierge capabilities and how it can impact partner adoption, how to drive concierge services locally and globally by learning from one region and localizing it for another region.

Section V is about the capabilities and services ZINFI offer and how they can help you to build a high performing channel on a world-wide basis.

The lessons and best practices in this booklet are based on years of intensive efforts creating and deploying sophisticated channel marketing automation systems as well as ongoing discussions with our customers as we strive to understand their evolving challenges and requirements.

Whether you read each section and chapter in sequence or skip around as your particular interests, we think there is a wealth of information here that even the most experienced channel marketer can learn from.

Enjoy!



1 Redefining Channel Management Through A Unified Lens

Most of us are aware of the complexity of channel management. It is even more complex for companies that are selling globally, because there is tremendous variability in requirements and parameters from region to region. I've written elsewhere about how global market requirements can have a tremendous impact on channel policies and programs, and how a company goes to market. In this chapter we will explore how a unified approach to channel management can greatly improve channel performance.

Before we delve into the solutions, however, let's talk a bit about the sources of complexity in channel management, particularly in the global context. First of all, a channel management infrastructure needs to account for different types of partners—whether they are alliance partners, go-to-market partners, solutions and services partners, or training partners—and how they form different parts of the ecosystem. Channel management needs to address the unique requirements of these different partner types. It also needs to take into account variations in market and industry requirements, which depend in part on whether the vendor operates in a business-to-business (B2B) or a

business-to-consumer (B2C) environment.

We also know that markets vary considerably by country. For example banking, finance and insurance are industries that are highly variable by geography, depending on the maturity of the country as well as local laws. Similar dynamics are at play in healthcare, education, government and other verticals in the B2B space. When a vendor is selling to consumers, channel management tends to be a bit more horizontal across countries and regions. However, there are big differences between developed countries and developing countries in terms of how B2C channels are managed.

Finally, the constant changes and evolution in products, services and solutions introduce still more complexities for channel management. For example, when a specific product like shampoo is rolled out globally, requiring significant localization of marketing and messaging, the approach is going to differ substantially from the approach required for high-tech products like manufacturing devices or network components or software, which are sold to businesses and marketed in a way that typically requires less localization. Differences like these have an impact on the level

of information that needs to flow through the channel and the complexity of managing the channel as you pursue channel marketing goals and initiatives.

I hope you can begin to see that one of the most important steps in establishing a unified approach to channel management is to take a broad, longer-term view. "Rome was not built in a day" may be a cliché, but it expresses a particularly apt principle for channel management. To be truly successful in channel management, you need to have an overarching business strategy in place.

One of the first things a company needs to decide is whether they are going to market directly to end users or via the channel. Most companies that sell consumer products market, by default, through some sort of distributor network. But even then they need to decide whether they are going to sell through franchises (e.g., Burger King or McDonald's) or sell directly through captive outlets (e.g., Starbucks). The same kinds of considerations apply when selling complex solutions through the channel, especially in the technology segment. The direct vs. channel discussion needs to be clear and upfront from the beginning, and then the strategy needs to be communicated repeatedly to the channel partners. Otherwise, they may feel their business is being undercut by the company. This is why, for example, high-value products like the Apple products are generally sold directly to consumers through Apple retail stores. When they are sold through channel partners the products are rarely discounted to eliminate any pricing conflict or share-shifting.

The same kinds of discussions take place in other industries. Companies have to decide whether to sell via open channels or closed channels. Whether the industry is insurance or real

estate or banking or high-tech products, at some point specialty capabilities may be required on the reseller side, such as initial certification or additional investments, and in cases like these partners may require assurances from the vendor that they won't make the products or services available to everybody and they'll ensure there's enough business available to a specific channel partner so they can break even on their investment costs. That's why the open channel vs. closed channel issue must be thought through and discussed in a very clear way.

Once a company has established a high-level channel policy and a distribution strategy, the next step is to think about the people structure, because at the end of the day companies do not do business with companies; people do. That's one reason it's so important to set up the right channel infrastructure—to make sure that high-volume partners who play a very important role have high touch, but at the same time ensure that partners who do not sell a lot do not feel left out. This is where organizing your channel management infrastructure is critical to make sure all partners not only feel valued and important but also get the level of support that's appropriate to their profile. From the company side, you need to ensure the channel management infrastructure is not cost-prohibitive but can actually drive growth and scalability.

A third important consideration in establishing a unified approach to channel management is process. When a partner is onboarded and has access to contracts, training modules, incentives, etc.—all those processes need to be clearly defined in advance, and they should be different for partners who have been doing business with the company for a long time. Processes related to deal registration and protection are incredibly important in the case



of high-value deals where partners need to be sure there is no over-distribution of solutions to the channel and so they don't end up fighting among themselves over price and losing collectively against other competitor solutions and products. Also, from an overall process perspective, both marketing and sales teams need to make sure that partners can differentiate from each other—a requirement that, by the way, extends to the solution structure itself. Often, vendors put programs together which are mass-distributed and don't provide specific partners or partner types with the opportunity to rise to the top, and that can result in some partners disengaging and guarantee the failure of certain channel initiatives.

These leads to my fourth consideration in establishing a unified channel management approach: programs. Companies can drive channel performance based on several factors. First of all, programs that are rolled out need to be closely aligned with partner competency. A partner that has just signed up with

“A channel management infrastructure needs to account for different types of partners—whether they are alliance partners, go-to-market partners, solutions and services partners, or training partners—and how they form different parts of the ecosystem”

company may not be eligible to sell certain kinds of products and services, whether B2B or B2C. There also needs to be close alignment with the partner business model. Pushing incentives programs that aren't aligned with a partner's sales and marketing focus may completely waste channel management resources behind programs that don't yield any results. The company's rewards structure needs to be carefully thought through. Rewarding a specific high-volume partner through back-end rebates or additional support mechanisms should be a very different process from setting up programs that drive individual sales rewards where each sales person can be motivated with specific incentives and rewards that will drive transactions. This

latter approach tends to work well on transactional products where a salesperson does not need to rely on multiple functions to pull solutions together. However, if a program is rolled out and tied to an individual reward, but the salesperson is heavily dependent on the vendor's marketing or technical or support infrastructure, that company or program can fail completely just because it wasn't thought through properly.

A final consideration in putting together a unified channel management approach is technology, which is obviously extremely important. In fact, at ZINFI we have coined the term “unified channel management,” in part to highlight three interrelated core elements of our channel management technology: Partner Relationship Management, channel marketing management and channel sales management.

With Partner Relationship Management, the primary focus is on how the vendor interacts with and manages the partner—signing agreements with the partner, getting them trained, providing incentives, managing performance based on several specific criteria, all at a holistic level.

Channel marketing management, on the other hand, is about enabling partners to go drive demand on their own leveraging marketing assets, sales programs, product initiatives and the like. Channel sales management applies mostly to enterprise-level sales, where people are actually trained through a multi-month, complex sales cycle using a step-by-step approach designed to ensure participants aren't overwhelmed by superfluous sales and marketing tools.

From a technology platform perspective, it is incredibly important—whether we are thinking about Partner Relationship Management, channel marketing management or channel sales management—to make sure all of these elements, individually or collectively, come with a set of business analytics tools for channel management. These tools allow the channel management team to slice and dice the data in various ways to gain insights into what is really going on, to understand what's working and what isn't, and to be able to actions based on that information.

If we step back and look at all of the things we need to consider and think through in order for channel management to excel, we might be justified in wondering how the channel actually works today. Well, the truth of the matter is that for many organizations it doesn't work nearly as well as it should. However, where there is proper alignment of channel policies, people, process, programs and platform, it is certainly possible to look at channel management through a unified lens of high performance, and drive growth at a lower cost in a global context.



2

How to Make Unified Channel Management a Reality

There is no doubt that channel management is complex. However, the complexity only increases when it is managed with a set of tools and systems that can easily be compared to a patched-up quilt. In many organizations, channel management systems actually consist of a hodgepodge of diverse systems that have evolved over a long period of time. As a result, most companies that try to implement a unified approach to their channel management struggle to make it work and get a decent return on their investment. The primary reason for this is a lack of available end-to-end systems that can readily adapt to each organization's unique needs. Every company is different. So, for example, a horizontal product like a customer relationship management (CRM) system cannot really address the requirements for unified channel management. While marketing automation systems have evolved quite a bit over the last few years, and CRM systems have also progressed considerably, no company has completely addressed the need for unified channel management.

So, how are organizations managing the channel today? Here are some of the key areas they are attempting to address, although rarely with complete success:

Partner portal: Most companies that are selling through the channel today have a partner portal. They build this partner portal over a period of years with various sets of tools, but there are no consistent standards that address how a portal should be built, and requirements also vary considerably across different types of channels. For example, if you're looking at a dealer network where the relationship is highly transactional, the partner portal will look very different from a portal in, say, the tech industry, where a solutions provider is working very closely with one or more technology providers to bring in complex, integrated solutions to the market. Similarly, a partner portal in the retail and franchise segment of the marketplace will be unique to those kinds of businesses. Because of this diversity in needs across segments, no vendor has been able to address the requirements for all segments.

Partner records: If we look at how most companies are selling through the channel, and in particular how they manage their partner records or their channel records, we find that most of them are using a CRM or some sort of home-grown database. In fact, based on a survey we conducted, more than 40% of

companies actually end up managing their partner list on an Excel spreadsheet. That's kind of scary, but that's where the market is today.

Partner onboarding: When it comes to building and growing a channel, partner onboarding is a critical first step. Yet most companies today try to manage partner onboarding with some sort of combination of CRM and Microsoft Office tools like Excel, and some even resort to keeping track through paper records.

Partner programs: To manage partner programs, some companies have started to use marketing automation tools like Oracle Eloqua or Marketo for direct marketing. However, those tools are way too complex for most organizations and they are not flexible enough to be deployed in a multi-tier channel where corporate can load campaigns and content, distribute those materials to their partners and execute marketing initiatives in a variety of shapes and forms.

Partner training is another area where very few companies have structured systems in place. But what's the point of recruiting partners if you don't have a structured way of getting them trained and increasing their competencies? Many large enterprises today have some sort of learning management system (LMS), but when you take a step down to companies below the \$500 million level or to companies that sell to other segments, they typically have

serious issues managing partner training.

A final, and very important, area of concern is partner incentives management. This is yet another area where it's quite commonplace to deploy a patchwork of multitude systems for managing market development funds, rewards, rebates, etc.

So, as we consider the challenge of unified channel management, we see that although companies may have the best of intentions in their efforts to pull together the right programs, the deployment and execution of those programs can be an absolute nightmare because there are no end-to-end systems that exist today to make it happen. However, companies like ZINFI and a few others are now working very hard to innovate with the goal of providing a complete, end-to-end, unified channel management infrastructure that can be not only modular but also comprehensive if all the modules are turned on and used in the right order.

If we step back and look at the problem from a systems perspective at a macro level and consider the core requirements of unified channel management, we can break it down into five parts, what I call the five Ps:

- 1. Profiles (partner profile management):** Partner profiles represent the most important first step in understanding existing partners' capability to sell into various segments of



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the market. Establishing the partner profile is also a precursor to expanding and growing the channel based on an understanding of what type of DNA an organization should be looking for when they are trying to recruit new partners. Without a sophisticated database system, it's almost impossible to analyze and manage a diverse set of partner profiles to drive productivity.

2. **Policies:** Channel policies determine who will sell to what and how. If a channel program has various types of partners, the competencies and reach of those partners, as well as the relationships they bring in, determine whether or not they are actually able to sell. If those policies are not absolutely clear, Unified Channel Management becomes really hard because organizations won't know what exactly to implement.
3. **Programs:** When we talk about programs, we're referring not just to campaigns like partner recruitment and partner training, but also the ability to put together market-segment-oriented solutions, training, incentives and so on to provide a truly unified channel management framework that allows an organization to recruit, engage, enable and manage their partner base to achieve a desired level of growth. Programs are critical, but they need to be analyzed from an ROI perspective. A unified channel management system should provide the tools that an organization needs to quickly perform such an analysis.
4. **People:** This is one of the most important Ps. How the field organization is structured, how territories are mapped, how the relationships between the regions and the worldwide organization work—all of these factors contribute to the broader framework required for people management to drive performance. However, without the right structure and the right Unified Channel Management system mapped into that structure, it's almost impossible to move fast enough and see through a dashboard what is going on in real time.
5. **Platform:** This is where tools and systems come in. Earlier I talked about why platforms are important. However, before a company can deploy a truly unified channel management system at a global level, it must think through the first four Ps mentioned above. How are we going to manage our partner profiling and profiles? What actions are we going to take based on that understanding? Are there policies in place that need to be aligned or streamlined? And can we streamline policies without a channel management system in place? What programs makes sense, and what data do we have to analyze programs and dynamically respond based on ROI analysis? How can we align the people to look for the most efficient structure? Once these questions have been answered, we're in a much better position to consider how to implement a system on a step-by-step basis so the organization is not overwhelmed but is able to systematically increase its maturity level through transparency and performance management globally.

Based on the points I've made above, you can see that unified channel management is indeed complex. However, with a thoughtful approach that focuses on the five Ps I've outlined here, an organization can create a maturity map through which they can substantially improve the performance of their channel organization and deploy systems that will make unified channel management a reality.



3

Evolution of Channel Marketing Software

Over the past three decades, the channel has become a very important way for many companies to reach end users, whether they are business buyers or consumers. Whether you're talking about retail or professional channels, the channel is here to stay. However, with globalization, and with products being manufactured in one country and being sold in another, channel marketing has become quite complex. Luckily, over the past couple of decades with the evolution of the Internet, and especially over the last 10 years with the evolution of the cloud, things are really coming together when it comes to channel marketing. A whole new category of channel marketing software is evolving that allows vendors throughout the channel to implement true end-to-end marketing and provide productivity and growth at a much lower cost than before.

A very brief history of channel marketing software

Let's take a step back for a moment and look at the history of

channel marketing software. When computers hit the market and became a staple tool in most businesses in the 80s, most companies managed their channels with some very basic tools like Lotus 1-2-3 or VisiCalc or some other spreadsheet program. Prior to that, of course, everything was manual, but some level of automation began to emerge and people began to use it to keep track of rebates, rewards, incentives, various types of sales activities and so on using spreadsheets. That was the first level of evolution.

When products like Adobe and other creative software suites became available, companies were using and designing marketing collateral that partners could co-brand and make available to customers. Gradually, with the advent of the Internet, the partner portal emerged and soon became an important channel marketing software tool, even though it had very limited capabilities and was used primarily for data warehousing. Nonetheless, the partner portal became a foundation on which today's channel marketing software is still building.

Niche use cases, vertical-focused tools

So if you look at the current state of things, today's channel marketing software consists primarily of marketing tools that vendors make available to multiple partners in various countries. Through these tools, the vendors try to communicate with their end-users, generate demand and manage relations. That has become the primary focus of channel marketing software. There are multiple players today who provide various sorts of channel marketing software and tools to vendor organizations. Most of these tools are focused on certain verticals. Whether they are technology-centric, consumer-centric, manufacturing-centric or insurance-centric, their origins are generally based on the industry background of their founders, and therefore on a particular kind of organizational knowledge for a specific industry. As a result of that fact, a lot of today's channel marketing software tends to address niche use cases that are specific to one vertical or another.

Based on information from industry analysts like Forrester, SiriusDecisions and others, there are now a couple dozen channel marketing software providers that collectively cover multiple industry segments. However, there is no single specific vendor that covers all use cases. We have also seen an extension of channel marketing software from marketing to productivity management activities, and therefore a whole category of partner relationship management has evolved from that. Some vendors, like ZINFI, provide both—partner relationship management as well as channel marketing automation—which are offered through an integrated software platform. At ZINFI we call it Unified Channel Management™.

The future is bright: reduced pricing, broader adoption, better integration, cross-pollination

So when we think about the future of channel marketing—as use cases from various verticals start to overlap and as channel marketing software products mature in specific segments and can be extended to other segments—we will see the emergence of more multi-segment providers. This is good for buyers and users. We will see cross-pollination of marketing ideas whereby marketers can learn from one industry vertical and apply those techniques to another. This is part of the ongoing evolution channel marketing software. We will also see a significant reduction in costs powered by ease of use at the product level and by reduction in cloud infrastructure costs, and the increased affordability will drive broader adoption and substantially increase the market space.

The importance of phased implementation

We continue to see among the customers we serve that adoption of channel marketing software in today's marketplace happens in multiple phases, and we sincerely expect this to remain the case for some time to come. In other articles, we have pointed out the adoption of channel marketing software is directly linked to a company's channel programs and the maturity of those programs. Organizations that have more mature channel programs tend to have a better deployment experience with their channel marketing software, exemplified by better organizational buy-in, more and better engagement with partners, appropriate partner marketing concierge investment, and so on.

However, if organizations with less mature channel programs overinvest in channel marketing software, it can turn out to be a big waste of money and severely complicate their go-to-market approaches. Therefore, at ZINFI we always recommend to our customers to implement channel marketing software in phases. The first phase is making sure that the channel partners are provided with a basic set of tools for marketing. This could be as simple as offering social syndication and web syndication tools. Once that's accomplished, most partners—especially in segments where solutions are sold—tend to rely quite a bit on events, so event marketing becomes another important channel marketing software feature. Then, as the channel marketing program matures further, the channel marketing software should be able to start automating incentives management in the areas of market development funds, rewards, rebates, etc.

At we look to the future, we at ZINFI believe in this evolutionary vision of channel marketing software—and it's a vision we are actively working to create—where the entire spectrum of channel management becomes unified. When it comes to market-to-partner, market-with-partner or market-through-partner activities, the entire category of channel marketing software has evolved from a very basic level of discrete marketing activities to a unified approach where partner relationship management, channel marketing automation and channel sales enablement all fit together in a single unified solution that vendors can deploy sequentially—not only to drive revenue, but also to reduce costs and drive scalability and uniformity across channel programs globally.



4

Channel Marketing Automation Software – Why The Rapid Emergence?

As the world gets more and more digitized, and technology touches every aspect of our lives, one evolution that is consistent across all segments of lives is software driven automation of work steps. Whether it's in the connected home or connected work place or intelligent manufacturing processes or financial management, business automation is here to stay, and will only increase with time. Within this fundamental change the most recent evolution has been in the area of automated channel marketing software.

So why is the category of channel marketing software growing and why is it needed? And, who should consider deploying it? Before we answer these questions in detail, let's look at the underlying factors that are driving the evolution of this new category.

Over the past two decades, the Internet has become not only a medium for content distribution, but also a utility that – just like electricity, water, air conditioning or heating – keeps an organization running. Today the Internet is a utility that allows businesses to distribute content and people to communicate, but it also has become a medium for distributing software that

automates business workflow. Software that used to run on our desktop, gradually moved to centralized servers and, over the past decade, outside the organization to the cloud. This trend accelerated due to the abundance of bandwidth and storage and the evolution of web services platforms that can run software in the cloud, eliminating the need to install programs onsite.

A brief summary of the evolution of enterprise automation software looks like this:

- 1. Phase 1 (Broad Enterprise Automation)-** The first category of enterprise automation software has been in the area of Enterprise Resource Planning (ERP), which included Customer Relationship Management (CRM), Manufacturing Resource Management, Financial Resource Management, etc. This is where companies like SAP, Microsoft, Oracle and IBM have created technologies, and continue to dominate end-to-end automation and management of business processes. In this phase we also saw the evolution of Business Intelligence software that pulls data together from multiple systems to give a holistic view of the enterprise, with the goal here of

enabling data-driven management decision-making and resource allocation.

2. Phase 2 (More Deeper and More Specialized Tools)–

During the past decade, we have seen the evolution of marketing automation software designed for the mid-market and enterprise space from players like Eloqua (acquired by Oracle), Pardot and ExactTarget (both acquired by Salesforce.com), Marketo, Hubspot, Act-On Software and many more. Most of these organizations today boast multi-billion valuations representing the future potential of growth in their respective segments. There also has been innovation in small business marketing automation areas – driven by players like ConstantContact and Vertical Response. As a result, it is now accepted that when it comes to core business

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processes like sales, marketing, manufacturing and finance, automation is critical not only to reduce cost, increase repeatability and reproducibility, but also to create competitive advantage against other players in the market place.

Amazon is first a software company, and secondarily a reseller of products and services. We have seen business like bookstores – for example Borders in the U.S. – going out of business, simply because they did not compete in the arena of digitized content and distribution of goods and services via Internet process automation. The same thing is happening with all companies that are not adopting digital sales and marketing processes using end-to-end automation, and the same logic applies to the recent

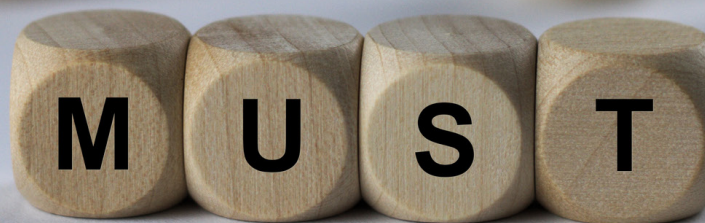
evolution of automated channel marketing software. If you are selling direct, the chances are you have already automated your sales and marketing processes, or are in the process of doing so. Otherwise you risk going out of business, just like old-school bookstores. However, if you are selling indirect, through a channel, it's possible that you may have not considered automation yet, simply because it is a new and rapidly evolving segment.

So, what is the state of the channel marketing automation software industry today, and where is it going? Here is a brief summary.

1. Channel marketing automation software today– There are thirty or more vendors – like ZINFI – who are turning over something in the range of \$5-10 million a year in revenue, focused on various aspects of channel marketing automation software. Some providers target their offerings at specific technology segments and automation of workflows related to the management of resellers, VARs, system integrators, or managed services. Some channel marketing automation software vendors are in the business of automating vertical industry segments like retail franchise, affiliate marketing, healthcare, insurance or real estate. However, all share broadly the same goal, which is to automate two or more tiers of marketing and sales processes via channel marketing automation software. This is something that older school direct marketing automation vendors do not do today.

2. The future of channel marketing automation software– Just as standalone products have become features over time in all other automation sectors, it is clear that most of the sub-segments discussed above will be absorbed into a single segment of multi-tier marketing and sales automation for different vertical market. This evolution represents the next phase of the channel marketing automation software segment, which we will discuss in a future article. How do we know it's coming? Well, we have already experienced the evolution of Unified Channel Management that basically now comprises Partner Relationship Management and Partner Marketing Management. These two distinct workflows now can be unified under one software platform and provide true end-to-end visibility, scalability and control to channel professionals.

Channel marketing automation software is at an exciting phase in its development. Even in its early days of evolution it already has produced significant cost savings through streamlining of process steps, elimination of wasted labor, and freeing up marketing and sales funds to invest into strategic growth areas. It will continue to do so on an even greater scale in the years to come.



5

Must-Haves for Your Channel Marketing Platform

With the advent of the Software as a Service (SaaS) based marketing automation platforms, over the past few years we have seen the rapid evolution of several channel marketing platforms. However, before you make significant investments you should make sure that the channel marketing platform that you are consider can satisfy a set of several core and advanced requirements.

At ZINFI, we have coined the term Unified Channel Management (UCM) as a way to indicate the comprehensiveness of a channel marketing platform. Today, several acronyms are used by various analysts firms to describe basic categories under the channel marketing platform umbrella. Here are the basic definitions that are being used.

a) Partner Relationship Management (PRM) – This category primarily focuses on enabling a vendor selling through the channel to recruit, train and manage their partner base effectively. PRM tends to include applications like partner onboarding, partner training, deal registration, market-development funds, rewards, rebates, etc.

b) Partner Marketing Management (PMM) – The entire focus for this platform is to enable the partner run integrated campaigns to generate leads. Some analysts are calling this Through Channel Marketing Automation (TCMA) or Through Partner Marketing Automation (TPMA). However, both TCMA and TPMA refer to the same thing.

c) Unified Channel Management (UCM) – At ZINFI, we refer to the combination of PRM and PMM as Unified Channel Management (UCM), since you need both set of capabilities to

“In addition to these core capabilities, your channel marketing platform should have a dynamic reporting and analytical engine allowing you to cut your data in multiple ways and understand what is working and what is not.”

truly manage a channel end-to-end. When someone is referring to a channel marketing platform, they may be referring to UCM or components of UCM. However, the term channel marketing platform is now broadly used.

With the definitions behind us, it is important for us to understand what the core capabilities of a channel marketing platform are. In order to define the capabilities of a channel marketing platform within the context of an organizational channel maturity framework (please refer to our article on Channel Marketing Automation Can Increase Channel Management Maturity) it is important to break down the feature sets into three levels, from the most basic to the most complex:

1. Level 1 (starter capabilities) – In this phase you need a set of capabilities that allow you to recruit, train and manage partners. Therefore, your channel marketing platform should have the following capabilities:

a) Partner portal – You should be able to share channel program content with your partners based on their type and location.

b) Documents management – You should be able to share data sheets, pricing information, program information, etc., through a downloadable interface for both PC and mobile platforms.

c) Basic market-to capabilities – You should be able to send emails and other communications to inform partners what you are doing with your programs.

2. Level 2 (advanced capabilities) – If you are in this level, then your channel marketing platform should have the following core feature sets:

a) Partner Profile Manager – This is a CRM-like database where you would house all your partner records. However, the capabilities of a Partner Profile Manager (PPM) are more advanced than a basic CRM. The Partner Profile Manager (PPM) not only houses records, but also integrates with your training, certification and sales tracking tools to make sure you have comprehensive profiling capabilities.

b) Deal registration – As your channel starts to grow, your channel marketing platform should be able to address your need to protect the deals generated by your partners to minimize channel conflict. This is a core capability that your channel marketing platform must have. This capability should directly link not only to your Partner Profile Manager (PPM), but also to your existing CRM infrastructure so that you can seamlessly track how your partners are performing.

c) Advanced market-to capabilities – In this level, your channel marketing platform should allow you to have advanced marketing capabilities – e.g., search, social, syndication and events. By using this tool, both your field marketing and channel sales teams should be able to effectively segment, profile and market to the partner base and keep track of their engagement to substantially increase program effectiveness.

d) Advanced learning management – The ability of a channel partner to effectively market and sell depends to a large extent on the partner's knowledge of the vendor's products and solutions. This is where Learning Management System (LMS) features come into play in your channel marketing platform. When you are evaluating a PRM platform, make sure the LMS capabilities match your requirements.

e) Multi-partner demand gen – Your channel marketing platform should give you the ability to completely set up co-branded campaigns for your partners to use and drive demand. This is incredibly important if you want to drive partner-led demand generation and want to equip your partners with state-of-the-art integrated campaign assets and tools.

3. Level 3 (mature capabilities) – In this phase, you will need to make sure that you have true end-to-end channel management capability and that your channel marketing platform gives you comprehensive capabilities to manage your channel to its fullest potential

a) Advanced portal capabilities – You should be able to localize your content, promote the content via various means (such as search and social) and track effectiveness.

b) Incentives management – Your channel marketing platform should allow you to dynamically manage various aspects of your partner incentives program using market development funds, rewards, rebates, and other incentives.

In addition to these core capabilities, your channel marketing platform should have a dynamic reporting and analytical engine allowing you to cut your data in multiple ways and understand what is working and what is not. Channel marketing is complex, and it requires a balanced and integrated approach using programs, process, automation and people.

Now that you have a good sense of the core capabilities a channel marketing platform must have, please feel free to navigate through www.zinfi.com or sign up for one of our deep-dive webinars if you want to learn more about how some of these capabilities can take your channel to a new, higher level of performance.



6

Using Integrated Marketing Tools Effectively for Channel Marketing Automation

Many Channel Marketing Automation vendors today provide tools such as email marketing, event marketing, and web and social content syndication. However, it's questionable whether these tools are enough in themselves to stimulate demand and channel engagement. So what else is needed to complete the demand generation tool set, and how can a technology vendor make sure they buy the right system, and pay the right amount to achieve the desired ROI? These are important questions; moreover, for larger vendors they need to be considered in a global context.

First-generation Channel Marketing Automation tools typically offered web syndication, event marketing and email marketing. In the ensuing phase, most Channel Marketing Automation vendors – like ZINFI – introduced tools like social syndication and on-demand webinars. While these tools were somewhat effective in building sales pipeline, their impact was only moderate. In an effort to understand more, ZINFI last year undertook an extensive, in-depth channel partner survey, which has provided useful insights on the

elements needed and changes necessary to drive higher utilization and better return from channel marketing automation platforms.

Time is a prime concern. Channel partners are tightly focused on sales and technical support and only in comparatively rare instances have dedicated marketing staff. So while vendors offer easy mechanisms to issue simple email blasts or implement pre-prepared web content syndication, they can't overcome the fact that the partners are busy – VERY busy – elsewhere. Most vendor tools are potentially useful, but not sufficiently so – they don't go far enough. Technology vendors therefore need to look at other ways to energize their partners to undertake marketing. One effective way is to provide a set of integrated tools that is not only easy to use but also preconfigured for various types of campaign.

Any effective demand generation platform must incorporate the following tools and functionality:

- 1. Lead Management–** While most Channel Marketing

“ Channel partners are tightly focused on sales and technical support and only in comparatively rare instances have dedicated marketing staff. So while vendors offer easy mechanisms to issue simple email blasts or implement pre-prepared web content syndication, they can’t overcome the fact that the partners are busy – VERY busy – elsewhere. Most vendor tools are potentially useful, but not sufficiently so – they don’t go far enough. Technology vendors therefore, need to look at other ways to energize their partners to undertake marketing. ”

Automation platforms offer basic capabilities to upload leads (or records of potential prospects or existing customers) a true lead management platform needs to include a traditional customer relationship management (CRM)-like interface, for two main reasons:

- For ease of use, the lead management system needs to connect both to the technology vendor’s and the partners’ own CRM system in order to enable data to flow seamlessly back and forth
 - Most partners today use a CRM system such as Salesforce.com, so providing them with a CRM-like interface for lead management will drive adoption faster.
2. **Lead distribution**– Most vendors provide leads to their top tier partners, but to build pipeline and promote best practices beyond this rarified level, it’s critical to create a competitive environment for lead distribution. The Channel Marketing Automation tool must be able to distribute leads to pre-defined partner sets, whether to a small segment or to all partners, e.g. in a shark tank mode.
 3. **Campaign-specific tools**– Not all tools are relevant for everything, so it’s important to determine the purpose of each campaign. Social and search marketing are effective for awareness generation. Email, Events and Content Syndication showcases are primarily used to generate engagement with prospects. Deep dive training or product usage videos work well for gauging trial interest and qualifying leads. Also, depending on the target segments – SMB, Mid-Market or Enterprise – one or more tools may be needed to make a campaign productive.
 4. **Multi-touch campaigns**– Most mid-market and enterprise buying has a long evaluation cycle. In order to stay in the game – not just be included at the last stage for price comparison purposes – a Channel Marketing Automation platform should have multi-touch capabilities. This is essential to automate DRIP campaigns and provide successive content-driven engagement stages to move the buyer along their evaluation process.
 5. **Dynamic reporting**– You need to be able to measure what you get, so if you cannot slice or dice the data from your campaigns in multiple ways you will not know – and your partners will not appreciate – what is really working in each campaign, and why some partners are more successful than others. So, comprehensive, end-to-end, dynamic reporting functionality is critical to enabling continuous improvement and remedial action.
 6. **End user-facing sales tools**– Generating leads is the first hurdle, but the next is lies in closing the sale. Most vendors carry multiple products, and many of the end user facing marketing and sales tools, e.g., battle cards, case studies or pitch sheets, are scattered around in multiple places in the partner portal. Your Channel Marketing Automation platform should be able to consolidate all relevant information in one place within the campaign, allowing your channel partner to easily locate what they need to take a lead through its cycle as quickly and efficiently as possible.
 7. **Making results count**– The platform you choose must be able to provide channel partner stack ranking – just as you do for your own direct sales force – to identify who is building the biggest pipeline and who is falling behind. Sales is a competitive sport, and a ranking system will stimulate efforts while promoting the capabilities of your lead management systems.

ZINFI’s Partner Relationship Management (PRM) platform can provide you with an integrated Channel Marketing Automation tool that not only allows partners to reap the benefits of the relevant digital marketing tools, but also manages the demand generation process end to end, with minimal effort and maximum impact.



7

5 Ways to Use Channel Marketing Automation to Get Your Partners' Attention

Most technology vendors struggle to keep their partners informed about product and program changes via their Channel Marketing Automation platform. This happens mostly when the vendor relies too heavily on Email Marketing based communication. While all Channel Marketing Automation tools provide Email Marketing as a core tool of communication, very few provide a set of alternative or supplementary communication tools, and this is a problem, because email is easy to ignore and ineffective as a single communications medium. ZINFI's Channel Marketing Automation platform provides realistic, alternative tools to bridge this gap.

An average channel partner with \$2 million to \$10 million in annual revenues will probably carry products from between six and forty technology vendors. Each vendor provides multiple products that go through product refresh, updates, and end of life announcements on a quarterly basis. On top of that

each channel program has multiple updates related to market development funds (MDF), rewards, rebates, training, etc. Multiply that by a factor of six, or – even worse – forty, and you can see that the stream of information will be excessive, confusing, and easily forgettable. If vendors try to communicate to channel partners via emails only, it becomes almost an impossible feat to create an informed channel. The average email open rate is only 10-15% for most email blasts to the channel. So, what can be done? Here are 5 options:

- 1. Mobile Responsive Portal**– Almost all partners today live by their smart phones, and like any other business users they access a lot of information on their mobile devices. Therefore it makes sense for vendors to separate daily and weekly communications on to a web-based mobile platform, and encourage partners to bookmark that site on their handheld devices.

“ While all Channel Marketing Automation tools provide Email Marketing as a core tool of communication, very few provide a set of alternatives or supplementary communication tools, and this is a problem, because email is easy to ignore and ineffective as a single communication medium. ZINFI’s Channel Marketing Automation platform provides realistic, alternative tools to bridge this gap. ”

2. **Mobile Applications**– It is relatively easy to develop branded mobile applications, but only if you have a structured way to push fresh content. Product and program related content can easily be sent to a mobile application, and this creates a secure way of pushing content to partners – including sales videos, product training, and program announcements. However, content segregation is the key for success via mobile devices. You only want to push relevant content to relevant partners – not everything to everyone.
3. **Social Communities**– Most vendors are engaged in social communities targeted towards channel partners; however, information is not often distributed through these communities in a strategic way and much content is pushed randomly. A better tactic is to create multiple communications streams for topics like sales, marketing, training, or products. While you cannot push confidential or sensitive information (such as special pricing) through a publicly available site, information can be provided in such a way that partners are alerted about changes, and can then log into a secure site (mobile friendly is recommended) to access more information.
4. **Mobile Video Portals**– If a picture is worth thousand words, a video is worth a million. Most partners very rarely in an office. So, while they are waiting in the lobby to meet a client, traveling, or taking a break from a partner training conference, they have multiple opportunities to watch three- to five-minute-long information videos. It’s a simple matter today to take and upload videos without needing special production facilities. Get a simple tripod for your smartphone and you are in business.
5. **Audio Podcasts**– The podcast has been around for years, but still fewer than a handful of vendors use them effectively. It’s incredibly easy to create three to five minutes of relevant audio podcasts and push them via social media or mobile portals. This allows you to get a lot of information out to a very wide audience with remarkable speed. Since most partners drive to work, the audio podcast is a highly effective way of distributing channel updates, product refresh information – and even pricing changes.

ZINFI’s Partner Relationship Management (PRM) platform– along with Email, Event & Microsite marketing – provides an alternative set of communication tools as described above and this enables Channel Marketing Automation to increase reach and engagement with channel partners.



8

How to Empower Country Teams Using Channel Marketing Automation

The primary challenge for any reasonably large technology company with global presence, marketing in a business-to-business (B2B) channel environment, is making sure that marketing assets that are created centrally for global use can actually be deployed locally. Most companies would also like to see substantial content development and deployment at a country level to boost the local sales efforts. So, how do you do that in today's resource-constrained environment? This is where a global channel marketing automation platform and concierge services come in.

In today's resource constrained environment, the constant focus is on greater accountability and ROI tracking from marketing investments. Traditionally, an army of marketing resources is needed not only to develop campaigns, but also to execute them and track results. Surprisingly, very few organizations take a structured approach to marketing and few apply marketing automation or, indeed, sufficient resources to their campaigns. As a result, they resort to running impromptu campaigns that are insufficiently strategized and coordinated to drive predictable results or report ROI on a central or global level. As a result, far too much channel marketing investment ends up being questioned.

And to complicate this further, lack of insight at global level into country-by-country activities leaves the last mile in a cloak of invisibility, where it's impossible to see whether content is touching prospects or customers via channel partners. This inability to monitor campaign results and ROI leads to further poor decisions regarding the future of campaigns: how can the marketing teams know which horizontal or broad-brush campaigns can be leveraged globally, and which are better suited to a vertical market approach (e.g. education or retail) that will need to be developed locally.

In fact, there is a relatively simple fix for this problem. The goal of loading global marketing assets and then allowing different countries to augment these with local content can be easily addressed with a well-structured and systematic channel marketing automation program. These are the core elements to look for:

1. **Group and Role Management**— Your channel marketing automation platform should allow you to set up different groups, e.g., global, country or territory teams, as well as assign specific roles in the process to channel partners, channel marketing managers, distribution managers, or channel account managers.

2. **Setting Access Rules**– The channel marketing automation platform should allow you to set access rules, i.e., define who can upload, edit, view and use content and campaigns for marketing activities.
3. **Assignment of Campaigns by Access Rights**– You should also be able to assign certain campaigns and assets to certain groups and roles. This graded access and rights management capability is critical for your channel marketing automation platform, because providing personalized campaign access significantly improves partner experience, creates greater control and better reporting.
4. **Content Localization**– Once you have uploaded global campaigns to the channel automation platform, your local country teams should be able to access this content to localize or customize it – without, of course, being able to change the master copies and assets. The ability to copy existing material from a global library, and create a local content library is a must-have capability for your channel marketing automation platform
5. **Campaign Usage**– Your channel marketing automation platform should be able to track detailed usage reports that show who is accessing your global content, who is creating local campaigns, and how they are working. This knowledge can be applied in many ways, for example in ‘reverse engineering’ local campaigns. You might be able to take a successful local campaign and go global or regional with that material, with or without modification. Visibility into campaign usage is critical to drive better ROI both at a local and global level.
6. **Agency & Concierge Access** – Many large organizations use multiple third party agencies and marketing concierge services, so the channel marketing automation platform should be capable of allowing those external groups to access campaigns and content in a secure fashion.
7. **Dynamic Reporting**– In addition to usage, the channel marketing automation platform should also be able to track all necessary input and output metrics tied to your social marketing, search marketing, event marketing, email marketing, or other marketing mechanisms.
8. **Single-Sign-On (SSO)**– In addition to these core edit capabilities you should be able to manage access (add, delete, modify users, rights, etc.) in a dynamic way, either from your partner portal or via your channel marketing automation. Therefore your channel marketing automation platform must have a Single-Sign-On (SSO) connector.
9. **CRM Integration**– Last but not least, for you to allow your country teams to access your content management system from your channel marketing automation platform, you will need to make sure data can flow back and forth from your existing CRM platform, whether it is on Salesforce.com, SAP, Microsoft Dynamics, Oracle or another CRM platform.

These nine core capabilities of your channel marketing automation platform are critical to enable your country teams to access global materials, customize them and use them locally – either using internal company resources or via external marketing concierge services or creative agencies. ZINFI's Unified Channel Management platform, comprising Partner Relationship Management (PRM) and Partner Marketing Management (PMM), allows any organization to seamlessly deploy global content and assets and customize them locally.

“ In today’s resource constrained environment the constant focus is on greater accountability and ROI tracking from marketing investments. Traditionally, an army of marketing resources are needed not only to develop campaigns, but also, to execute them and track results. Surprisingly, very few organizations take a structured approach to marketing and few apply marketing automation or, indeed, sufficient resources to their campaigns. ”



9

How to Drive Adoption of a Channel Marketing Automation Platform

Vendors selling to a channel need to enable their channel partners to generate and drive channel partners. This has been a challenge for almost all vendors, whether they are selling to vendors or consumers. While partners are a great fulfillment arm, few of them generate enough leads to drive demand on their own. To address the problem more companies over the past few years have been deploying channel automation platforms. However, the adoption of these platforms in the channel has been quite poor, and this has led to a lot of speculation and frustration. It has also led a number of companies to switch providers of channel marketing automation platforms, thinking that the move from one platform to another might help them attain higher levels of adoption. However, the issues generally lie elsewhere. Yes, the channel marketing automation platform needs to be robust, scalable, easy to use, etc., but only rarely is the failure to achieve widespread adoption of automation in the channel tied directly to the channel automation platform itself. In this article we will explore the core issues that underlie channel marketing automation adoption and outline steps vendors can take to generate ROI from the

investment they are making in channel marketing automation platforms.

Challenges

1. **Lack of partner resources.** Most channel partners have neither resident marketing experts nor sufficient resources to create and execute campaigns on their own. As a result of that, most marketing channel automation platforms that are introduced into the channel are simply not used. The problem is not that the platforms are difficult to use, but that partners don't have the resources—namely, time—to sit down and learn a tool and then go execute a campaign or a program. Also, in the case of large partners that do have sufficient resources, often those resources go into vendor management and relationship management rather than into the proper use of channel management automation software.
2. **Lack of horizontal campaigns.** Vendors typically deploy a marketing channel automation platform with new or

niche products. Partners, on the other hand, generally do not want to squander whatever limited time and resources they have on programs that are not time-tested. In fact, one of the main challenges in spurring adoption of channel management automation is that deployment is often tested with campaigns that lack excitement on the partner side.

3. **Lack of partner incentives.** Vendors will often have several campaigns, assets, etc. uploaded on the marketing automation platform, but without aligning any specific incentives with those campaigns. As a result, partners fail to see the benefits of putting in all the hard work of executing a campaign when the easiest thing they can do is just have the vendors hand over qualified leads. From the partner perspective, that's a more efficient way to go.
4. **Lack of internal organizational alignment.** It's quite common in many organizations for the internal sales team or channel account management team or partner business management team not to be fully aligned with the channel marketing management automation system. In those cases, even when marketers load up a campaign on the platform, without inside sales or channel sales buy-in the campaign doesn't go anywhere and the channel marketing platform is rarely discussed in a face-to-face partner meeting or in a phone conversation. As a result, channel marketing automation remains a "sidebar" conversation rather than a mainstream focus.
5. **Lack of public celebration.** Most vendors have annual partner conferences where they try to promote the use of the channel marketing automation platform. However, most partners attending such conferences choose to attend such events for other reasons. Very rarely do they attend in order to check out all the cool features and functionality of a channel marketing automation tool, or to investigate the campaigns in such a tool or the services provided around it. Thus, the platform rarely gets promoted properly. Also, organizations do not necessarily celebrate the use of the platform to access such campaigns or assets in a global format—drawing attention to the fact that partners who are using it are actually getting good results.

Solutions

How do we overcome these barriers to the adoption of partner marketing automation?

1. **Deployment of partner marketing concierge services.** Because partners typically lack extensive marketing resources, one of the most important things for vendors to budget for and invest in is shared marketing resources

that partners can use in bite sizes (read our article – How to Provide Partner Marketing Concierge Help in Bite-Sized Chunks). Many vendors or organizations selling to the channel try to save money in this area, asking the internal sales people or the account management team to become the marketing concierge arm of the organization. This is an absolute failure in the making, because most of the time the sales teams are too busy executing their own goals and objectives, and don't have time to go learn a tool or a set of campaigns and thereby drive automation of the channel marketing automation platform by partners. Thus, a critical success factor in adoption of the channel marketing tools is either outsourcing to a third-party concierge service or providing concierge services internally.

2. **Quarterly updates of campaigns around products that sell.** It's incredibly important to have fresh campaigns available—at least two to three campaigns per \$100 million of business the channel is doing on a quarterly basis. Why that number? For every large organization, a typical product line varies between \$100 million to \$200 million. From a solutions selling perspective, if there is a quarterly refresh going on—perhaps the product is getting upgraded or there's a pricing change or a promotion—there is something that can be loaded onto the platform that a partner can use to drive communication and lead generation from the company's installed base and potential prospect base.
3. **Alignment of partner incentives.** As we touched on before, aligning partner rewards, rebates or market development funds (MDF) behind the adoption strategy of the channel marketing automation platform is absolutely critical. Let's say a vendor has a program focused on driving upgrades of existing software. When the vendor rolls out that program, it is also essential to make sure that the MDF—whether for telemarketing or event marketing or online, search and social marketing—are available for partners to use and align with their own interests, so they can tap into the funds to drive execution. In this case, marketing partner concierges from a third-party agency could offer substantial help, taking advantage of the marketing services agency's infrastructure. On top of that, if there are sales rewards whereby partner sales reps get additional incentives to sell and close deals, as well as additional backend rebates for partners, then the entire organization can be fully aligned behind driving a campaign within the marketing automation platform. This is another area where partner marketing concierges can help by coming in and educating partners, letting them know what campaigns they can pick and where their company can get extra rebates or margin, and explaining how their the

partner's reps can get reward dollars or loyalty points.

- 4. Celebrating success widely.** We've already talked about this as a major challenge to adoption. But addressing the challenge is not difficult. A quarterly webinar sharing where partners have used certain campaigns, how they have generated hot leads in the pipeline, how they have closed leads, how many leads they have closed and what the largest deals or opportunities are can have a huge impact in promoting the efficacy of the channel marketing automation platform in driving demand. This is not a lot of work, and a partner marketing concierge can easily do it, but it can have a significant impact in building credibility in the channel, as well as aligning the sales team from within to make sure they're actually seeing results from the investment that the channel marketing team is driving. Finally, when considering how to celebrate success, the organization also needs to reward employees internally—whether it's a channel account manager or a channel business manager—for the right behavior in driving demand using the right tools and the right campaigns in the right way.

Yes, it can be hard to drive adoption of the channel marketing automation platform in the channel. However, it can be accomplished with a systematic approach. Certainly, the barriers I've mentioned above might give rise to perceptions that the challenges are daunting, but the solutions I've suggested are straightforward and attainable, and any organization can deploy them in 90 to 180 days. One last tip: When deploying a marketing automation platform, the organization must start with a single region only. There is likely to be internal pressure to roll out a platform globally very quickly. However, without the alignment of partner marketing concierges, quarterly refresh of campaigns, partner alignment with incentives, alignment of account management infrastructure, and without figuring out meaningful ways to celebrate success, the results from one region may not be compelling enough to drive adoption in other regions. On the other hand, if the vendor is successful in adopting the platform in that first region, other regions can easily be convinced to follow suit and replicate the execution model by looking at what's working and by localizing campaigns and incentive structures for a specific region or country.

“The adoption of channel automation platforms in the channel has been quite poor, and this has led to a lot of speculation and frustration. It has also led a number of companies to switch providers of channel marketing automation platforms, thinking that the move from one platform to another might help them attain higher levels of adoption.”



10

Why Most Channel Marketing Automation Tools Fail to Deliver

In today's world, if you are selling through the channel you probably rely on some level of automation no matter how simple or comprehensive it is. However, when organizations step back and look at all the investments they are making in various channel marketing automation tools and capabilities, the first question they should ask is, "Are we getting our money's worth?" Sadly, in most cases the answer is a resounding NO. Why? That's what we explore in this article.

Most organizations selling through the channel have gotten to this point by leveraging a few core tools—say, a partner portal, partner training, partner incentives and lead management. Most of these pieces in the channel marketing automation puzzle have been around for a while, but the disparate nature of their existence has also created unnecessary complexity and a decidedly poor partner experience. The result is often a mish-mash of software patched together to create a channel marketing automation system.

When channel marketing automation fails to deliver reasonable ROI, this piecemeal approach is almost always at the root of the problem. This is where an integrated approach—what we at ZINFI

call Unified Channel Management—comes in. The entire concept of Unified Channel Management is to provide a set of software components or modules that work together via the same platform to provide a unified experience and flow, both for partners and for users from the organization selling through the channel. This unified approach significantly improves ease of use and lowers the cost of implementation, because an organization no longer has to worry about fitting disparate pieces together.

The next big hurdle when it comes to making a channel marketing automation tool succeed is the failure to localize both software and program content to match the language and culture of specific audiences. This is especially true for organizations selling to international markets, but it can also be true even in local markets like the US, where there are increasing needs to address multilingual users.

Now, localization doesn't stop at software and content, but also applies to the partner support system. If you are rolling out a channel marketing automation platform outside English speaking countries, it is essential to provide localized support for those

countries in local languages and local hours. When you provide English language support to non-English speaking countries, you are creating a huge hurdle for adoption of any channel marketing automation tool and platform.

Once an organization has made sure it has the right unified approach to channel marketing automation and has created a truly localized experience (English and non-English), then the next step is to figure out how to drive awareness and adoption. This is where a state-of-the-art channel marketing automation platform can help significantly.

Today, any best-in-class channel marketing automation platform comes with a variety of tools for both partners and for vendors selling through the channel. This includes both digital and analog tools—tools for search, social media, email, events, microsites and so on. The availability of such tools is critical for driving awareness and engagement among the partner base in a structured way. In order to fulfill the potential of a channel marketing automation platform, partners need to know about the platform's many capabilities and use them regularly.

Finally, channel marketing automation may disappoint because of a failure to celebrate and reward success. We can all relate to this. Once we see someone else is successful, we want to emulate their success. This applies to the channel as well. Not only should we

celebrate and reward partners who are successful, but we should also identify the reasons for success by analyzing data generated by the channel marketing automation system. When you expose other partners to key drivers of success, and reward the ones who are doing the right things the right way, you are making a logical, facts-based case for why other partners should use channel marketing automation. We at ZINFI have seen that this is one of the most important ways to stimulate partner adoption of the channel marketing automation platform, increase partner satisfaction and deliver results at a lower cost.

“When organizations step back and look at all the investments they are making in various channel marketing automation tools and capabilities, the first question they should ask is, “Are we getting our money’s worth?” Sadly, in most cases the answer is a resounding NO. Why?**”**





11

Why Channel Marketing Automation Tools Need Concierge Support to Succeed

As vendor organizations trying to sell through the channel deploy channel marketing automation platforms to enable their partners to drive demand from their prospect and customer base, vendors may become frustrated by the lack of adoption of these state-of-the-art tools. Why don't more partners use channel marketing automation platforms to take advantage of the various tools and assets vendors provide? In other articles we have discussed in detail a variety of factors that may be at play in the lack of adoption among partners (see, for example, Why Partner Marketing Fails Most of The Time), but in this article, we will focus on one specific solution that in many cases can solve the problem.

First, let's quickly define what a channel marketing automation platform is and list its basic components. Then we will explore why partners do not use many of these tools and why broader adoption is always a challenge. A state-of-the-art channel marketing automation platform should be able to address both inbound (e.g., search, social and web syndication) and outbound (e.g., email, telemarketing and microsite) marketing tactics. The

channel marketing automation platform should also be able to provide different campaigns to different groups of partners so that only relevant campaigns are available to individual partners, depending on their profile. And finally, lead management will play a central role in driving the marketing activities forward so vendors can truly track return on investment from these integrated tactics.

The challenge, however, is this: When a vendor launches a channel marketing automation platform, after the initial excitement the adoption typically drops quite dramatically over a period of time. What are the primary reasons for such a failure and what can be done about it? To answer, let's first identify the most common types of failure that prevent widespread adoption of a channel marketing automation platform.

- 1. Awareness** – If you have a broad channel with a few thousand partners, chances are the majority of them are not aware of your channel programs and tools. So, if you are trying to deploy a channel marketing automation platform,

you need to focus on driving awareness first. In order to do this you need marketing concierge capabilities that will drive integrated campaigns (search, social, email, webinars, etc.) to drive awareness among your partner base. It is always good to start with the most valuable partners (MVPs) first and then work your way down to your broader list in some sort of a logical fashion.

2. **Engagement** – Driving awareness is one thing; driving engagement is another. It is essential, once your partners are aware of your channel marketing automation platform, to make sure your concierge infrastructure engages the partner through proper training. This is where the partners should not only learn how to use the tools by themselves, but also understand how to pick the right campaign for their market segment and how to drive prospect and buyer engagement. This is a very important step for the success of your channel marketing automation platform.
3. **Execution** – Once you have crossed the first two major hurdles of making partners aware of how your channel marketing automation platform can help and then showing them how the platform can positively impact their sales pipeline, the key next step is to help them execute campaigns. Since partners are busy, you have to provide help on demand so they can reach out via email, chat or phone during business hours to get support, but also get support during off hours using online help and other means to educate themselves. This support needs to be available locally in the various countries where you are providing the channel marketing automation platform.
4. **Rewards** – One great way to drive awareness and engagement is to celebrate success. We talk about this a lot because it is incredibly powerful. If partners cannot see how the channel marketing automation platform is benefiting other partners, many may not engage at all—despite a high level of awareness. Giving out awards, celebrating success and promoting best practices are critical activities for driving adoption of your channel marketing automation platform.
5. **Repeat engagements** – Once you have successfully engaged a partner to go execute campaigns and programs using your channel marketing automation platform, the next step is to make sure they repeat those activities on their own (or with the help of your concierge team) quarter after quarter. Marketing is not an event—it's a process. If your partners are selling to midmarket and enterprise prospects, it is highly unlikely that one simple marketing tactic such as email, events or telemarketing will drive results on its own. That's why it's so important to put together a multi-quarter campaign plan and drive execution successively. The more partners that do this globally, the bigger your partner-led pipeline is going to be.

So how can these issues be solved? Here's the secret: You need a partner marketing concierge organization. You can either build this in-house or find a marketing concierge agency that can do this for you globally. In case you are trying to build this in-house, here are the key elements you need to address to build a successful partner marketing concierge program that can drive pipeline and partner satisfaction.

1. **Concierge competency development** – This is your front line to your partner awareness, engagement and execution support. It is very important to make sure you have a multi-level concierge support infrastructure, and appropriate partner-facing competencies. When it comes to supporting your channel marketing automation platform successfully, you will need to make sure there are three core competencies in place when it comes to hiring, training and growing your concierge teams: customer service skills, technical marketing abilities and organization skills. We will explore these competencies in detail in a separate article.
2. **Concierge process automation** – Automating your channel marketing processes includes not only putting together the channel marketing automation platform and the right structure around people, but also an automation capability that allows you to streamline your concierge engagement process with your partners. This is somewhat similar to a technical support infrastructure, but it's different in that you probably need more collaboration tools to keep track of changes to what the partners are using from a marketing services perspective, such as marketing collateral, list services, and so on.
3. **Concierge performance tracking** – In much the same way you manage your other team members, you will need to manage your concierge team to make sure they are hitting their onboarding and execution targets. It's one thing to put together a group of people to dial out to a partner, but it's an entirely different matter to truly optimize the performance of this organization to drive top- and-bottom line results and improve partner satisfaction. We will discuss how to do this in a separate article.

As you can see, rolling out a channel marketing automation infrastructure is only the first step. To ensure your partners adopt the platform and drive results, you need a complementary marketing concierge infrastructure (people, process and platform). You can certainly build this internally, or you can outsource it to a company like ZINFI, where we do this for a living. An effective partner marketing concierge service can put together marketing plans, support execution and drive results tracking for a large group of partners globally. Reach high, make your partners happy, and drive adoption and results globally!



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How to Provide Partner Marketing Concierge Help in Bite-Sized Chunks

Most channel partners don't have a marketing department, a marketing specialist, or even an outsourced marketing provider, and even if they do, these resources tend to operate not as marketing strategists, but more as vendor interface managers – handling multiple vendors and a variety of product lines. This is where a partner marketing concierge comes in.

It is fair to say that most channel partners don't really have the capabilities to execute vendors' marketing programs or even specific campaigns effectively. What's more, most channel partners don't receive enough market development funds (MDF) at the right time to hire dedicated resources for a specific campaign or program. While some large distributors and a few, very large channel partners may receive funding for certain marketing resources on an annual contract; this is more of an exception than the rule. It looks like an impossible dilemma, but there is an easy way around this: provide the channel with partner marketing concierge services in bite-sized chunks.

Setting aside their lack of marketing resources, most channel

partners don't even have any kind of marketing automation infrastructure to drive a flow of leads in a consistent fashion. As a result, most partners, if they do any kind of marketing at all, tend to default to running events from time to time, coupled with random email or telemarketing campaigns. When these don't produce leads or results, partners get frustrated with marketing and abandon their own efforts, as well as ceasing to engage on co-marketing efforts with vendors.

Over the past decade – following the lead of larger organizations like HP, Cisco, IBM and other major players – mid sized IT vendors have also started providing marketing tools, campaigns, assets and collateral to their channel partners. However, lack of dedicated resources on the channel means that adoption of these assets is very rare. The only way to overcome this impasse is to provide partner marketing concierge services to the channel base as an add-on capability. While the first step in enabling channel partners should always be the introduction of an end-to-end integrated channel marketing automation platform, without the provision of additional marketing enablement services, for the most part the potential of these platforms remains unrealized.

While top tier partners usually have access to market development funds (MDF) (please read our article [What Can You Do to Drive Your Market Development Funds Utilization?](#)), most do not take a strategic approach towards marketing. They tend to engage on transactional campaigns like email marketing or event marketing, which may work for small and medium deals but fail to deliver for higher value solution selling. We have recently seen some of the larger IT vendors starting to provide partner marketing managers to channel partners via their field organization, but this is not a scalable model above and beyond a handful of partners.

So, if your channel is doing 80% of their sales via 5-10% of your partner base, and the revenue generated per partner is in excess of a few million dollars per year, then dedicating marketing personnel to specific channel partners can provide ROI. However, that leaves hundreds or thousands of partners with no meaningful marketing support. (Further information is available in our article – [How Partner Profiling Can Increase Your Channel Sales](#)).

One resource-efficient way to resolve this issue is to provide outsourced partner marketing concierge services which partners can acquire on a temporary basis – say for a quarter or two – for an affordable, modest sum that could vary anywhere from a few hundred to a few thousand dollars and is funded by vendor MDF. When a vendor aligns their market development funds (MDF) process behind such a concierge effort, they can create a menu-based marketing catalog, incorporating pre-approved campaigns and activities which partners can select and execute independently, requiring very little support from the vendor's sales or marketing organization.

Using a outsourced partner marketing concierge service, a channel partner will be able to run integrated campaigns using various types of marketing tactics, e.g., search marketing, social marketing or social content syndication, web content, event marketing and email marketing. If needed, a partner marketing concierge provider can also enhance the program by providing telemarketing or tele-prospecting services, setting up appointments with qualified leads that partner sales teams can engage with and close.

This outsourced partner marketing concierge structure is gaining rapid popularity in small and mid-sized IT vendors, following the lead of larger IT vendors who have already deployed this structure across all geographies. ZINFI's Partner Marketing Concierge services can enable a small and mid-size IT vendor to rapidly deploy one or more campaigns globally and fund them with market development funds.

“Most channel partners don't receive enough market development funds (MDF) at the right time to hire dedicated resources for a specific campaign or program. While some large distributors and a few, very large channel partners may receive funding for certain marketing resources on an annual contract; this is more of an exception than the rule.”



13

Partner Marketing Concierge Services: Learn Locally, Scale Globally

One of the realities of channel marketing, of which vendor organizations are all too painfully aware, is that the majority of channel partners do not have dedicated marketing resources. So, when a vendor wants their channel partners to run marketing campaigns, it is not only essential to provide a channel marketing automation platform, but also to give the partners the means to make it happen by providing partner marketing concierge services. Now the key question is, once this preliminary phase of deployment has happened, how can a vendor optimize ROI from their programs by learning locally and then scaling globally? This article looks at the key steps to be taken.

To build a state-of-the-art channel marketing platform, a vendor needs multiple core components – a channel program, partner profiling, channel marketing automation, partner marketing concierge services, proven and tested end user marketing campaigns, and marketing and sales rewards. The great news is that many of these elements can be replicated across multiple countries using a single, unified approach. While it's important to localize the language and content for each country, the program won't scale or provide sufficient return unless a significant portion

of the program dollars can be reused in multiple countries. Engaging a global partner marketing concierge organization is critical to make this scalability and localization a reality.

Any successful channel development program requires the creation of a sequential approach to delivering various program elements, and should build upon the basic partner program framework elements, which should include partner recruitment, engagement, enablement and management strategies. Here, we will focus principally on one critical aspect of a channel initiative: how to enable partners to generate more demand by using partner marketing concierge services. The following seven core elements will help any vendor to use the same dollar to receive multiple returns.

1. **Deploy Channel Marketing Automation** – Ensure that you deploy a platform that can be localized, and allow country teams to access, upload content and programs without being reliant on centralized, global teams. While global content can be easily uploaded and shared via a channel platform, an effective automation platform will enable the reverse to

happen – when country teams can upload local promotions or campaigns to the platform. These can be tested in one market, and if successful can then be deployed in other markets.

2. **Leverage Horizontal campaigns** – The best way to get return out of campaign dollars is to figure out which campaigns have horizontal potential, i.e. which campaigns will be effective in multiple countries, enabling the use of the same graphical and creative assets in multiple languages. Many vertical campaigns – finance, real estate, healthcare, etc. – tend to be highly country-specific and tied to local market dynamics. So, to build momentum faster, look for horizontal campaigns that can be used in multiple countries.
3. **Globalize core campaigns, localize in-country offers**– Any channel marketing automation platform should allow you to customize global content at a local level, for example, to include country-specific offers, before the country team pushes the global content out to the channel. A global partner marketing concierge agency can help with the localization process.
4. **Develop menu-based campaign options** – Channel partners not only lack marketing resources, but also don't have the expertise to set up effective integrated or transaction campaigns without expending considerable time and effort. This is where menu-based offers can significantly help channel partners, providing a means to enable them to quickly select and deploy campaigns. Once you have analyzed what is working in one country, and that has the capability of being deployed in other countries, leverage your partner marketing conciergeagency to roll out menu-based campaigns in other countries. For this, however you will need an outsourced partner marketing concierge to provide localized services in multiple countries.
5. **Pick a partner marketing concierge vendor with truly global capabilities** – Having the right partner marketing concierge agency is critical for your ability to learn locally and execute globally. You need a vendor that can leverage the learnings from one market and, through its own program management and account management structure, rapidly share these learnings in other countries. The IT industry moves on a ninety-day quarterly cycle, and time is of the essence. Therefore, the speed with which your partner marketing conciergevendor can deploy its learnings to different countries can make or break a global channel marketing program.
6. **Track ROI for global and local campaigns** – Assuming you have deployed a unified channel management platform that gives you comprehensive visibility of your programs, you will have ROI tracking capabilities that will help you quickly analyze the effectiveness of different programs in different countries.

ROI data will help you understand which programs can be horizontally scaled so that you can rapidly deploy them in other countries via your partner marketing concierge.

7. **Learn, Edit, and Do it Again** – It may take you a year or eighteen months to accomplish steps one through six, but after that you will have a significantly enhanced capability to learn in one country, improve in another, and repeat in further geographies in a very short period of time. This is the true value of 'learn locally and scale globally'.

Every company needs to focus on their core value proposition, and partner up with experts who can help them with their other contextual requirements. In some cases vendors, have insourced their marketing concierge capabilities by hiring field marketing resources, but this is an expensive option. Significant cost savings and global scalability can be achieved by partnering with a reputable global partner marketing concierge agency. Further information can be found in our article – How to Provide Partner Marketing Concierge Help in Bite Sizes.

ZINFI not only provides a state-of-the-art unified channel management platform, but also brings in local presence in multiple countries around the world, enabling vendors to deploy partner marketing concierge capabilities affordably and rapidly. Over the past ten years ZINFI's experience in multiple IT domains such as networking, security, virtualization, storage, application delivery and more has enabled us to provide a highly trained channel marketing team that can significantly augment a vendor's channel capabilities and increase ROI.

“*To build a state-of-the-art channel marketing platform, a vendor needs multiple core components – a channel program, partner profiling, channel marketing automation, partner marketing concierge services, proven and tested end user marketing campaigns, and marketing and sales rewards.*”

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Definition of Unified Channel Management (UCM)

Unified Channel Management (UCM) allows a vendor organization selling through the channel to take an integrated approach by aligning channel policies, channel programs, channel people (both internal employees supporting the partner base and employees of external partners), business process automation and channel partners to build a high-performing global channel. This unified approach to channel management requires end-to-end automation of three core sub-processes:

- **Partner Relationship Management (PRM)** – These partner management activities focus on optimizing and automating internal partner management processes to make it easier for partners to do business with the vendor. A properly configured PRM solution significantly reduces operation costs, efficiently allocates resources behind the partners who have the highest potential for driving profitable growth and significantly increases partner satisfaction
- **Partner Marketing Management (PMM)** – These channel marketing activities focus on enabling channel partners to drive demand from their prospect and customer based by leveraging the vendor's marketing assets and tools. A PMM solution can help vendors optimize the use of market development funds, stimulate purpose-driven demand generation and exert control over brand extension via channel partners.
- **Partner Sales Management (PSM)** – These channel sales enablement activities focus on enabling both internal channel-focused resources (channel account manager, field marketing managers, distribution managers, etc.) and channel partners to close more deals faster. A properly deployed PSM solution gives marketing and sales team members insight into the effectiveness of specific marketing assets, and sales campaigns and can significantly increase sales closure rates and predictability via a distributed partner network.

Partner Relationship Management (PRM)

Module Overview



Portal Content Management

The Portal Content Management module enables an organization to set up and manage partner portal content and “to partner” campaign content. All content can be assigned to different partner groups with granular access control.



Partner Learning Management

The Partner Learning Management module enables an organization to manage channel partner training and certification by various partner tiers and types to grow partner competencies in a systematic way through structured curricula.



Channel Profile Management

The Channel Profile Management module enables an organization to granularly manage partner records, including accounts, contacts, performance data and more. Using this module, organizations can segment partners effectively into groups with various parameters for optimized management capabilities.



Co-Branded Assets Management

The Co-Branded Assets Management module enables an organization to provide digital assets to channel partners, who can then co-brand these assets and reuse them for various marketing- and sales-related activities.



Partner Onboarding Management

The Partner Onboarding Management module enables an organization to automate partner recruitment and onboarding processes via step-by-step activities. Based on partner type, engagement and other variables, you can create different onboarding tracks.



Partner Lead Management

The Partner Lead Management module enables an organization to distribute leads to their partner base and manage the entire “contacts to contracts” process. This module can help engage partner sales reps via round robin, shark tank and other lead management strategies.



Partner Contracts Management

The Partner Contracts Management module enables an organization to dynamically manage and keep track of all the contractual documents that channel partners sign during the various phases of the partner engagement cycle.



Market Development Funds Management

The Market Development Funds Management module enables an organization to allocate market development and co-op funds to partners. You can also use this module to help partners apply for program funding and claim compensation by supplying proper proof of execution.



Partner Documents Management

The Partner Document Management module enables an organization to upload various types of partner-facing documents into folders. These documents and folders can be assigned to various partner groups with granular access control.



Partner Rewards & Rebates Management

The Partner Rewards & Rebates Management module enables an organization to automate management of various incentives schemes, such as sales rewards, company rebates and commissions to drive channel performance.



Partner Business Planning

The Partner Business Planning module enables an organization to develop business plans by working with internal and external partner stakeholders to ensure plan execution and compliance.



Business Intelligence Reports

The Business Intelligence Reports module provides hundreds of default reports as well as tools for creating custom reports. This allows users to understand what is working and what needs improvement in channel performance and programs at a local and global level.

Partner Marketing Management (PMM)

Module Overview



Portal Content Management

The Portal Content Management module enables an organization to set up and manage partner portal content and “to partner” campaign content. All content can be assigned to different partner groups with granular access control.



Channel Profile Management

The Channel Profile Management module enables an organization to granularly manage partner records (accounts, contacts, performance data, etc.). This allows you to segment partners effectively into groups with various parameters for optimized management capabilities.



Partner Lead Management

The Partner Lead Management module enables an organization to distribute leads to their partner base and manage the entire “contacts to contracts” process. This module can help engage partner sales reps via round robin, shark tank and other lead management strategies.



Search Marketing Management

The Search Marketing Management module provides a dynamic linkage between paid ad (Google AdWords, Facebook, etc.) search network and marketing campaigns. This module is used for multi-partner inbound integrated lead generation activities.



Social Syndication Management

The Social Syndication Management module enables an organization to syndicate social media content via the channel partner network. Partners can autostream or manually customize each social feed for instant or delayed posting.



Web Syndication Management

The Web Syndication Management module enables an organization to distribute product and solution web showcases via a channel partner’s website. Web syndication amplifies organizational reach and lead generation through a distributed channel partner network.



Microsite & Landing Page Management

The Microsite & Landing Page Management module enables an organization to set up co-branded microsites or landing pages. This allows partners to engage their prospects and customers via single-touch or multi-touch digital drip campaigns.



Co-Branded Assets Management

The Co-Branded Assets Management module enables an organization to provide digital assets to channel partners, who can then co-brand these assets and reuse them for various marketing- and sales-related activities.



Event Marketing Management

The Event Marketing Management module enables an organization to set up trigger-ready multi-touch “event in a box” campaigns that can be quickly co-branded and customized. This allows channel partners to engage their prospects and customer base.



Email Marketing Management

The Email Marketing Management module enables an organization to set up multi-touch co-branded emails. These emails create the foundation of various integrated campaigns, whether they lead to microsites, events, syndication or call campaigns.



Campaign Library Management

The Campaign Library Management module allows an organization to set up various content and tactics so that channel partners can run single-touch or multi-touch co-branded campaigns using a SMART campaign flow.



Business Intelligence Reports

The Business Intelligence Reports module provides hundreds of default reports as well as tools for creating custom reports. This allows users to understand what is working and what needs improvement in channel performance and programs at a local and global level.

Partner Sales Management (PSM)

Module Overview



Portal Content Management

The Portal Content Management module enables an organization to set up and manage partner portal content and “to partner” campaign content. All content can be assigned to different partner groups with granular access control.



Channel Profile Management

The Channel Profile Management module enables an organization to granularly manage partner records (accounts, contacts, performance data, etc.). This allows you to segment partners effectively into groups with various parameters for optimized management capabilities.



Sales Documents Management

The Sales Documents Management module enables an organization to upload various types of partner-facing documents into folders, and assign these documents and folders to specified partner groups with granular access control.



Sales Learning Management

The Sales Learning Management module enables an organization to train its channel sales reps and partner sales reps in bite-size steps. The module uses a micro-learning approach, linking learning and asset delivery to solutions and sales stages.



Sales Assets Management

The Sales Assets Management module enables an organization to organize buyer-facing assets and make them readily accessible to channel marketing reps, partner sales reps and other platform users. Partners can quickly modify assets before sending them to prospects.



Channel Data Management

The Channel Data Management module enables an organization to access point-of-sales data from distributors and resellers to track performance by region, territory, reseller and product, and to proactively manage inventory.



Buyers Engagement Management

The Buyers Engagement Management module provides tools for channel sales reps and their partner reps for sending digital content such as emails, landing pages and solution showcases to prospects, and for tracking engagement.



Sales Gamification Management

The Sales Gamification Management module enables an organization to promote various sales rewards programs. Organizations can use a leaderboard to stimulate competition and drive rep engagement in a virtual environment.



Configure Price Quote (CPQ)

The Configure Price Quote (CPQ) module enables an organization to offer special pricing and quotes approval mechanisms for partner sales reps, channel reps and channel management team members.



Rapid Dialer Management

The Rapid Dialer Management module provides a high-volume automated dialing capability to partner sales reps for more efficient telemarketing. The module makes it easy for reps to follow up on leads and develop sales qualified opportunities.



Partner Lead Management

The Partner Lead Management module enables an organization to distribute leads to their partner base and manage the “contacts to contracts” process. This module can help engage partner sales reps via round robin, shark tank and other lead management strategies.



Business Intelligence Reports

The Business Intelligence Reports module provides hundreds of default reports as well as tools for creating custom reports. This allows users to understand what is working and what needs improvement in channel performance and programs on a local and global level.

Concierge Service Management (CSM)

Module Overview



Portal Content Management

The Portal Content Management module enables an organization to set up and manage partner portal content and “to partner” campaign content. All content can be assigned to different partner groups with granular access control.



Email Marketing Management

The Email Marketing Management module enables an organization to set up multi-touch emails. These emails create the foundation for a variety of integrated campaigns that the concierge team can leverage to inform and engage partners.



Channel Profile Management

The Channel Profile Management module enables a concierge to granularly manage partner records, including accounts, contacts, performance data and more. Using this module, organizations can segment partners effectively into groups with various parameters for optimized management capabilities.



Event Marketing Management

The Event Marketing Management module enables an organization to set up trigger-ready multi-touch “event in a box” campaigns that can be quickly used by the channel concierge teams to inform partners about various channel programs and initiatives and encourage partner engagement.



Social Syndication Management

The Social Syndication Management module enables a concierge team to syndicate social media content via the channel partner's network to promote the organization's programs, products and channel initiatives.



Rapid Dialer Management

The Rapid Dialer Management module provides a high-volume automated dialing capability to partner sales reps. It helps concierge teams prospect more efficiently so they can easily follow up on leads and develop sales qualified opportunities.



Concierge Documents Management

The Concierge Documents Management module enables an organization to upload various types of concierge-facing documents into folders, and assign these documents and folders to specified concierge teams with granular access control.



Partner Business Planning

The Partner Business Planning module enables a concierge team to develop business plans by working with various internal and external partner stakeholders to ensure plan execution and compliance.



Concierge Learning Management

The Concierge Learning Management module enables an organization to manage channel concierge training and certification. This training covers all the capabilities the concierge needs to master in order to provide comprehensive marketing and sales support to partners.



Partner Feedback Management

The Partner Feedback Management module enables an organization to set up an integrated partner feedback management process by leveraging a dynamic survey module. Surveys are designed to constantly capture data and provide actionable insights.



Campaign Library Management

The Campaign Library Management module allows an organization to set up various content and tactics so that channel concierge can run single-touch or multi-touch co-branded campaigns using a SMART campaign flow to inform and engage partners.



Business Intelligence Reports

The Business Intelligence Reports module provides hundreds of default reports as well as tools for creating custom reports. This allows user to understand what is working and what needs improvement in channel performance and programs on a local and global level.



About ZINFI

ZINFI Technologies, the leader in Unified Channel Management (UCM) innovation, enables vendors and their channel partners to achieve profitable growth predictably and rapidly on a worldwide level. Headquartered in Silicon Valley, USA and founded by channel veterans with extensive global channel management experience, we at ZINFI see an immense opportunity to build high-performing sales channels by deploying an easy-to-use, comprehensive Unified Channel Management platform that streamlines and manages the entire partner lifecycle.

ZINFI's Unified Channel Management innovation incorporates three core state-of-the-art SaaS applications—partner relationship management automation, channel marketing management automation and channel sales management automation. In 26 countries, these three core UCM SaaS applications are also locally supported by ZINFI's global marketing services team members.

ZINFI's Unified Channel Management solutions enable organizations selling via the channel to integrate the full spectrum of channel partner management activities—from recruitment, onboarding, training and certification to lead management, co-branded demand generation, sales performance and success, and on to fulfillment and renewal management. Powered by the efficacy and superior experience of ZINFI's UCM solutions, any organization can build a high-performing channel and realize increased partner sales return on investment.

The word ZINFI, to us, means Zero to Infinity—reflecting our mission to enable customers, employees and communities to realize their infinite potentials. In its most applied form in our day-to-day existence, the word refers to an analytical and mathematical approach to marketing and sales methodologies, an approach that allows our customers to realize the true potential of their own products and services and to continuously grow their business via the channel.





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