

## Partner Service & Support

In this whitepaper we consider the best approaches for providing a service and support offering to your channel partners for which the investment required is proportionate to the return yet the quality of offering is consistently high regardless of partner status.

### Partner Segmentation Versus Quality of Service

In an ideal world, partner service and support should be provided in the spirit of social welfare services - available to all, provided to a consistent standard and free at the point of use. In practice, things rarely work out this way. In previous whitepapers, we looked at partner selection and segmentation approaches leading to the development of accreditation hierarchies. These same hierarchies are commonly used to determine the nature and often the quality of service and support offered:

Accreditation	Classification	Characterisation	Resource Allocation
"Gold"	"Managed"	You sell a lot, so must be important. We'll look after you!	Account Manager
"Silver"	"Unmanaged"	You sell a something but we don't know much about you.	Telesales Agent
"Bronze"	"Disdained"	We don't know who you are and you don't sell much so we don't care much!	Partner Portal

As we already discussed, this approach simply exacerbates the pareto effect – 80% or more of a vendor's business derived from 20% or less of the partner base. This makes perfect sense. Higher tiered partners get the best levels of service and support and the greatest investment. Lower tiered partners receive the poorest service and the least investment. One could argue that this is only fair. However the model makes a key and often flawed assumption; that partners generating low levels of sales today lack potential for growth. Making the same assumption about customers would be unthinkable!

However, nurturing lower tiered partners to encourage growth can be a difficult and time consuming task. It is for this reason that many vendors simply don't bother to try. But in difficult business and economic climates such as those we currently face, failure to exploit all of the sales and marketing resources and opportunities

available to you is quite simply inexcusable. Our advice would be to invest in:

- Profiling your lower tiers
- Building a comprehensive database of your entire partner community
- Segmenting your partners based upon qualitative as well as quantitative metrics
- Targeting those partners with high growth potential
- Offering a consistently high quality of service and support to all regardless of tier

### Delivering High Quality Service and Support to "Managed Accounts"

Foundation Network concern ourselves with collaborative partner relationship management process automation and we know from experience that getting these essentials right and providing the tools and

resources to your field channel account managers and call centre agents delivers great results. What we will not attempt to do here is to discuss human partner management best practice as this is a topic best addressed by sales force development companies.

Let's take a look at some of the tools and resources that can tangibly improve sales force productivity, channel intimacy and ultimately drive indirect channel revenue growth

#### Account & Contact Management

Any relationship management system will provide sales people with the ability to populate your database with company and contact information. This will not only improve their own effectiveness in managing their accounts but will also support marketing communications and channel marketing program effectiveness. This helps to ensure that partners receive the most appropriate communications to their job roles and needs and improves the perception of the vendor's level of partner intimacy.

A partner relationship management system can provide sales people with tools to oversee their partner's interaction with many aspects of the partner program. This will include tiering and accreditation, training participation and personal certification, MDF accruals, claims and expenditure, sales incentive performance etc.

#### Activity Management

As important to sales managers as to the sales people themselves, activity management tools help to improve productivity and activity levels and monitor sales person interaction with their accounts. This also serves to increase the amount of proactive interaction and hence support time offered by the account managers to their partners.

#### Partner Management

A partner relationship management system can provide sales people with tools to oversee their partner's interaction with many aspects of the partner program. This will include tiering and accreditation, training participation and personal certification, MDF accruals, claims and expenditure, sales incentive performance etc. This helps make account managers more knowledgeable

about their accounts, have greater visibility at a detail level and facilitates consultative account support thus enabling them to deliver substantially more value to their partners.

#### Partner Portal

Tier-driven selective content presentation via the partner portal ensures that field and telesales managed partners activities can be backed up with tools, content and resources on the partner portal providing 24x7 partner support.

#### Lead & Deal Management

Manual lead management processes often involving telemarketing, telesales, field sales and partner reps can be fully automated along with deal registration programs to maximise productivity, speed up lead closure and deliver improvements in marketing campaign ROI. Well run, efficient and effective lead management programs are highly valued by partners.

#### Opportunity Management

Relationship management systems will enable field and telesales partner account managers to input and manage their sales pipelines tracking run-rate and project-specific business and provide managers with roll-up facilities to gain a top-to-bottom view of all sales opportunities.

#### Sales Forecasting

With all partner leads, deals and run rate business captured in the same system, forecasting is made easy and the process is dramatically simplified saving sales reps a great deal of time whilst improving accuracy.

#### Data Quality Management

Making sales reps responsible for managing and maintaining partner data takes a little time but helps them to engage in effective partner management and contact management ultimately improving partner relationships and sales rep productivity.

#### Document Management

By making your partner database the master repository of partner data, you can associate all documents from correspondence, marketing communications and price lists to contracts with a partner's record making them easy to catalogue and retrieve by anyone in your organisation. What is more, when a sales rep leaves the company or changes role, no documents will be lost or left on their hard drive. What is more, documents can be made accessible by the partners themselves via the portal on a self-service basis.

### Contract Management

Managing contract management and renewals online via the portal and automating the approvals processes will save sales rep time and help improve productivity, accuracy and consistency for both vendor and partner.

### Basic email Marketing and Communications

By driving all partner email and communications through your relationship management systems, data can be captured in the contact history ensuring that all contacts are recorded centrally rather than distributed on individuals PC's or laptops. Email templates for standard communications can be made available to sales users to improve consistency of look and feel and minimise duplication of effort whilst improving the quality, relevance and timeliness of communications to the partner.

In summary, greater automation and process simplification leads to improved productivity. Increased productivity in turn leads to more "face time" with partners or more time to build relationships with more partners. Essentially equipping your channel sales team with the right tools and resources with which to do their job is essential to providing high quality front line service and support to managed accounts whether they are looked after by field-based or telesales reps because of the substantial productivity and capability enhancements they offer.

### Sales Out Data

Integrating sales data from ERP systems, CRM systems or sales out data reports from 3rd parties into partner databases places all of the necessary performance management information into the hands of the partner account manager and ensures that the partner relationship management system becomes their most essential tool.

### Reporting Tools and Dashboards

To avoid forcing partner account managers to seek out performance data from your disparate systems, provide them with easy to use, self-configurable reporting tools and dashboards that give them instant access to key

performance metrics and allow them to extract reports to insert into business plans and presentations at the click of a button.

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### Delivering High Quality Service and Support to "Unmanaged" or Tier 3 Accounts

Foundation Network have built and deployed some of the industry's best and most successful partner portals. We don't write content – our customers are the best at doing that – but we do advise them on best practice in partner portal design and functionality to offer the best possible online partner service and support. Here are some tips that our customers have found useful

#### Portal Accessibility

##### Browser Testing

Partner portals should be compatible with the four most common browsers: Explorer 6, Internet Explorer 7, Mozilla Firefox 3 and Opera 8 and increasingly, they will be accessed by mobile devices so compatibility should ideally be ensured with mobile browsers as well.

##### Text Browser Compatibility

Text-based browsers support much more limited functionality and some forms or functionality will not look right or work properly. Make sure that yours do.

##### Window Size

Many partners will want to access the portal using a laptop with a correspondingly small screen. The portal's window size should be flexible and designed to fit well in the most frequently used laptop screen format of 1024 x 768 pixels.

##### Color Blindness

Portals should be tested under the constraints of a filter designed to emulate color blindness. This very common condition can make many websites very difficult to navigate.

### Navigation

It is essential that partners can easily access the information and tools they need with the minimum number of clicks from the home page. It is critical that the site structure is well thought out and that everything is navigable through no more than 2-3 clicks and is clearly signposted from the home page navigation.

### Use of Frames

If possible, avoid using frames. Some people have difficulty navigating within frames, either because the frames are confusing or because the software they are using simply cannot read frames.

When using frames, always offer meaningful NOFRAMES content for those people who cannot read framed information. Use NOFRAMES properly - "upgrade your browser" is of no help to someone using (through choice or necessity) the most up-to-date version of a browser that simply doesn't handle frames. The NOFRAMES section should contain meaningful content with links to the other pages in your site, so that they can be accessed without frames.

If you must use Frames, ensure that each frame has a sensible TITLE (in addition to the NAME) which gives a clear indication of the content to be found in that frame.

Make sure that partners have the means to contact you through the portal and provide a means to communicate with specific people, roles or departments. It is very effective to incorporate the names and contact details of those people in your organization – account managers, partner marketing team members, technical support team members and operations people who are actually assigned to the relevant partner.

### Portal Functionality

#### Sitemap

While sitemaps are not of vital importance to a portal site, they do improve the user experience particularly where there are navigation issues.

#### Search

It is important that a partner can easily mine the wealth of information contained in your portal so a good search

function is essential. Incorporate a high performance search engine with both basic and advanced search capability – we use Verity in our sites and be mindful of the presentation of search results.

### Contact Us and Contact Information

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### 'Remember Me' Functionality

The portal should contain a remember-me option on the log-in screen to prevent them from having to enter their access details every time they visit the portal. This makes the future login process much quicker and easier and addresses a common complaint that partners have regarding having to remember multiple ID's and passwords for the plethora of vendor sites they use.

### Printable Version and Exportable Content

Define and incorporate a specific print-style-sheet to ensure that pages are printed correctly. The printed pages should not contain the portal navigation which is usually not required when printing a portal page. The ability to export content for incorporation within presentations or proposals for example should also be considered.

### Partner Relationship Management Functionality

#### Self-Profiling

In order to maintain data quality in your database and improve the targeting and quality of your communication, offer partners access and editing rights to their profile data so that they can maintain themselves. Make this easily accessible to them from the homepage or as part of the navigation.

#### Lead Management

Coupling your marketing, lead generation and sales activities with automated lead distribution via the portal streamlines the process and delivers leads directly to the channel sales people best placed to close them. Additionally, if you provide a means for partners to update lead status themselves online, they can keep you

up to date and let you know when sales are won or lost. This also ensures that you can monitor performance and ensure that closers receive more leads.

### Deal Registration

Essentially, lead management in reverse, deal registration capabilities allow partners to register their own sales leads via your portal in exchange for some benefit or reward. If their leads can be seamlessly deposited into your integrated sales pipeline and managed online in exactly the same way as your own leads, the process is streamlined, kept constantly up to date and partners can be rewarded for deals upon closure.

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### Online Learning and Certification

Face to face sales and marketing training is typically not practicable or cost effective these days but in its wake has been left a void. Some vendors have made attempts to stretch legacy internal learning management systems to support online partner training but this presents a number of problems not least the creation of yet another portal for partners to use and one more database to keep up to date. Leading partner portals integrate e-learning with online testing and certification management to deliver a full range of partner training programs including technical and pre-sales and manage the entire process from content management through delivery and the management of complex accreditation mapping and scoring. This ensures that partners need only log in to one portal and all of their information is maintained up to date within the same database.

### Marketing Tools and Management of Marketing Funding

Many portals offer partners the opportunity to download marketing materials, brochures and presentations and a number of software or services companies have in recent years offered plug-ins to facilitate online customised or co-branded marketing material creation. Best practice partner portals integrate all of these capabilities but

additionally they facilitate full marketing collaboration between vendor and partner. This can include the facility to accrue and manage MDF accounts, claim funds and make redemptions against approved marketing campaigns all enabled by integration with the partner database and other enterprise systems at the back end.

### Incentives Programs

Loyalty programs and incentive campaigns are another program component often outsourced to third parties by vendors. Again, this results in multiple portals or websites, manual processes, inconsistent data and poor partner satisfaction. High performance partner portals

### Special Bid Support

Another process renowned for being at times painfully slow, bureaucratic and inefficient is the process of managing special pricing or bid support. Leading portals automate this process by managing product catalogues and pricing, bid requests, hierarchical approvals and imposing roles and controls. This once again enables partners to use the portal as a one-stop-shop and enjoy a much more convenient, efficient and speedy experience in supporting you in business development.

### Partner Locator

Link your corporate website to your relationship management system's database to provide an intuitive partner locator function that enables customers to match their needs to the most appropriate partner. Complete the loop by notifying the relevant partner immediately by delivering a lead with the customer's information to ensure that the opportunity is followed through. These "soft" leads are often less well qualified but much appreciated by partners.

### Content

#### Product Services Catalogue / Product and Services Collateral

There should be an abundance of "channelised" product or service information. By this we mean generic material that has been written specifically for a channel audience rather than for customers. Its aim should be to assist the partner in selling, marketing and supporting rather than persuasion to purchase. Information must be available in a variety of forms including audio visual, textual and graphical and it must wherever possible be available for download in formats that can be used by the partner in their own documents, proposals and collateral.

### Price lists

In addition to comprehensive and up to date product information fed from the latest integrated product catalog, portals should offer relevant partners online access to their own price lists

### Amount of Text on Page and Page Download Size

Avoid over filling pages with too much text and reduce as much as possible the need for partners to scroll down to see content. Use fonts and font colors that are easy on the eye. Keep text columns too wide to make them easier to read and balance your desire to impress with audio visual content including Flash with minimising page load times.

Partners will be drawn to the portal and spend more time visiting it if they sense that the content is tailored to their specific interests or needs. Ensure that your content management system or PRM system can present content based upon visitor profiles and that profiles are fully populated with personal content preferences.

### Persuasion Elements

Improve stickiness and the desire to explore the site and make use of its functionalities by using persuasion elements and calls to action on every page.

### User Specific Content

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### Partner Registration

#### Registration Process

Make the registration process easy to use and as brief as possible minimizing the number of screens and feels that the partner has to populate. Additional information can always be gathered later but a lengthy process can cause abandonment and the partner may never return.

### Approvals Process

Automate the approvals process by using your relationship management system. Ensure timely responses to the applicant and keep them updated throughout.

### Registration Incentives

Registration can be a chore for the partner. Incentivize them to go through the process if you can and entice them in by allowing them to sample the capabilities and benefits of your portal.

### Security

#### HTTPS

Most portals currently at least offer a secure connection on the registration forms and the pages on which profile data can be updated. However, if your portal offers PRM functionality including access to confidential financial data or tools capable of managing financial activities, it is essential that you consider HTTPS at least for the relevant pages.

#### Password Strength

Avoid including username and password in any activation mails sent to applicants as these may make it possible for this information to be intercepted. The activation email which users receive after signing up. Also, you should allow users to change your issued password and specify their own to the highest level of complexity.

### Legal

#### Disclaimer / Privacy Statement / Terms and Conditions

Websites that store and collect user information are required by law (data protection act) to inform their visitors about the usage of this data. Requesting partners to accept the terms and conditions for usage of the portal could prevent issues caused by inaccuracy of provided data and/or misuse of confidential information on the portal. With this in mind, ensure that the privacy statement and the portal terms and conditions are accessible before a user has logged on to the portal and when registering for an account to access the portal the partner should be forced to accept your terms and conditions for usage.

### Summary

Partner Portals used to be password protected websites that were often little more than repositories for out of date product information. Corporate websites have typically seen the bulk of vendor's investment over the years and consequently many of our prospective clients complain of falling hits and a general lack of interest on the part of partners towards their portals.

Today, vendors are recognizing the importance of ensuring that their partners are as well informed as their own staff and that they are provided with tools, resources and information to an equal standard. Consequently, we have begun to see a desire amongst vendors to dramatically improve not only the content of portals but also making them "self-service" sales and marketing assets for partners. In so doing they have recognized the importance indeed the necessity of deploying their partner portal not on a separate content management system but upon an integrated partner relationship management platform.

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### Partner Service and Support in the Age of Social Networking

Looking forward, we see a move towards increased partner network collaboration. We believe that leading vendors should not only support but actually facilitate communication, cooperation and collaboration between the members of their partner eco-system. Whilst many partners do compete, vendors have to some extent been complicit in dividing and conquering them. Partner portals of the future can and will play a part in bringing partners together to share strengths and compensate for weaknesses to deliver better solutions for customers. Web 2.0 will help in ensuring that, regardless of tier, label or hierarchy, all partners are given an equal opportunity to interact with the vendor and are encouraged to interact with each other for the good of the customer and of their business in general. In this way and by focusing on delivering the very highest quality of service and support to all of their partners, vendors have the opportunity to take their place at the very centre of the partner eco system rather than merely at the top of the food chain.