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# 14 STEPS

TO BUILD A PROFESSIONAL  
PARTNER PROGRAM

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# THINK BIG



A well designed partner program is the formula to power your sales to **Legendary Levels**. We are talking numbers you could never reach by yourself.





# HOW TO SELL & PROMOTE YOUR SOLUTION **EFFICIENTLY** THROUGH A PARTNER NETWORK





# INTRODUCTION

I created this presentation after doing extensive research on how to create a strong partner program. The data I have reviewed are from marketing experts, Gartner, reports and my own personal experience.



# MY STORY


**Daniel Nilsson** | Growth Strategist

My passion is to constantly improve and evolve companies. I love to create customer-focused solutions and processes that last. My future goal is to be part of creating and grow a solution that will affect at least 100 million people on an annual basis. I think giraffes are cool.

 [linkedin.com/in/danielnilssonsweden](https://www.linkedin.com/in/danielnilssonsweden)

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 Personal Webpage: [daniel-one.com](https://daniel-one.com)



# BEFORE YOU START

Business goals, vision and executive support.



This type of project is a big investment consuming a lot of resources. It is essential that you make sure it is **aligned with the company strategy**, business goals and that you have full executive support before you start:

- **Make sure you have executive support.**
- **Is this project aligned with the business goals and strategies?**

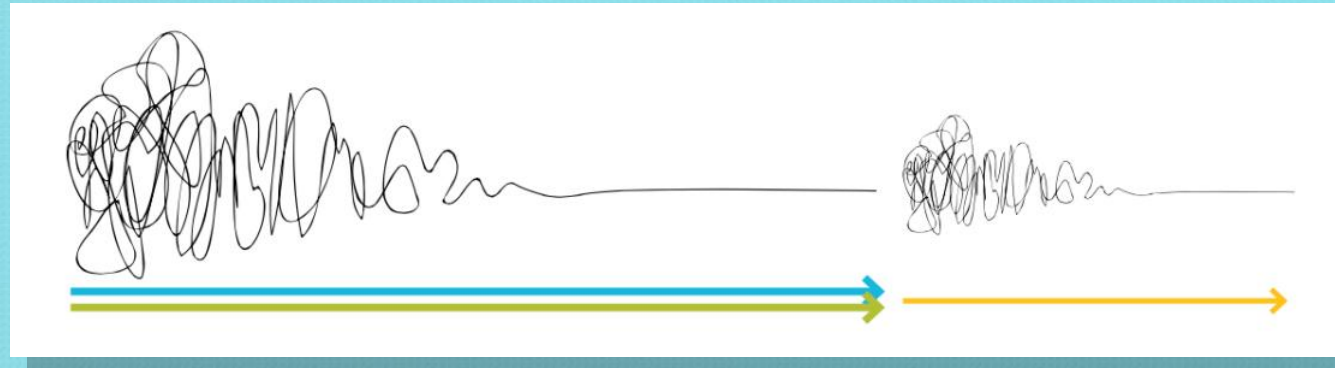




# BEFORE YOU START

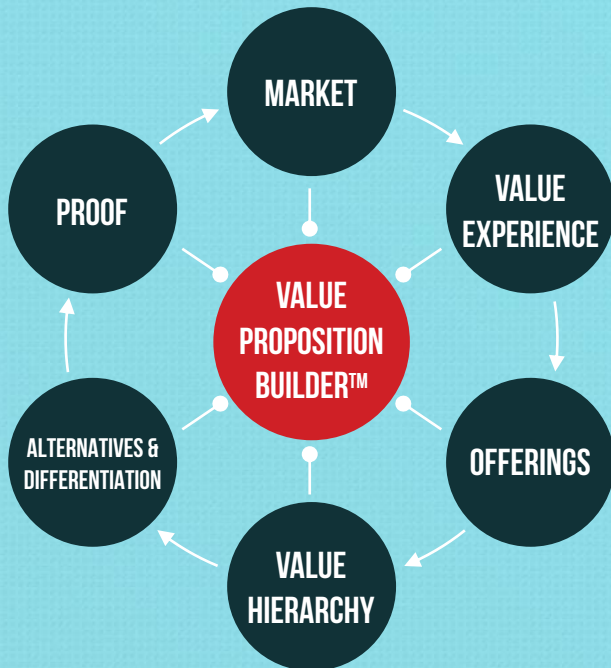
## The Creation is Not a Straight Line

The creation of a Partner Program **is not a straight line**. It's a lovely mess that gets more clear & straight, the more you learn & develop it. Suddenly the world or your business change and you have to start over.



# DEFINE A VALUE PROPOSITION

Value proposition is the #1 thing that **determines** whether people will bother learning more about your solution.



Use tools to define customers jobs, gains and pains. Make sure you rank what is most important.



Compare your value proposition to competitors and make sure you stand out.



Define jobs, gains and pains.



Understand your market, alternatives and competitors.



Define your base value proposition.



# CHECKOUT MY MOST POPULAR SLIDESHARE

How To Create A Strong Value Proposition For B2B.

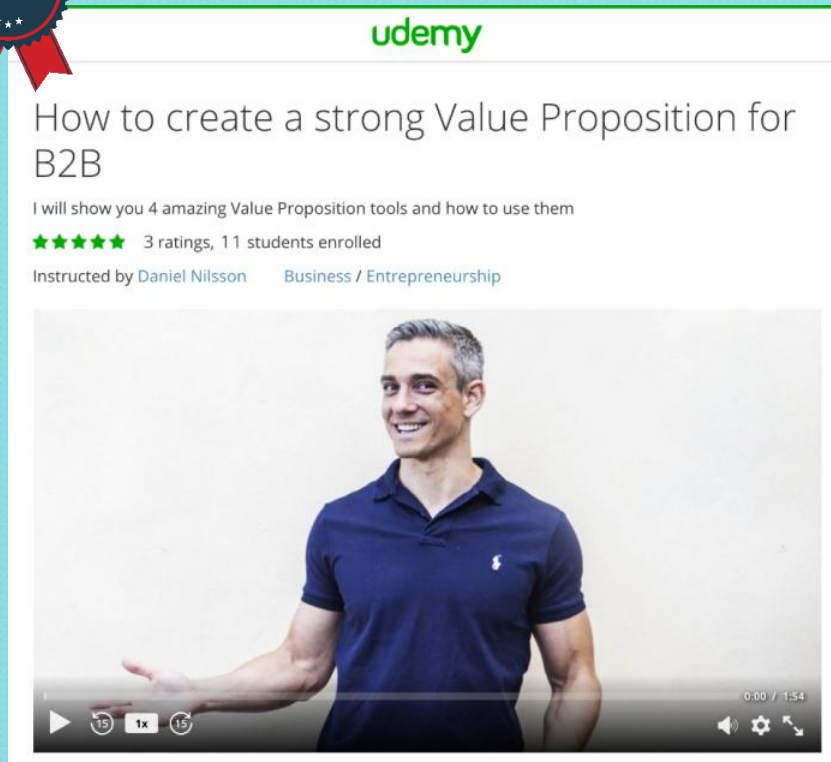


Learn how to create your value proposition using the 4 tools super professional use.

[click here](#)

# LEARN HOW TO WRITE VALUE PROPOSITIONS

Use the coupon **valueproposition** to get my value proposition course on [udemy.com](https://www.udemy.com) for the ridiculous low price 16 USD (20% discount included).



## WHAT YOU WILL GET FROM THIS COURSE



**Over 24 lectures and 1 hour of content!**



**Learn 4 amazing tools to create value propositions for B2B.**



**Advanced value proposition analytics.**



**Design your own Value Proposition.**



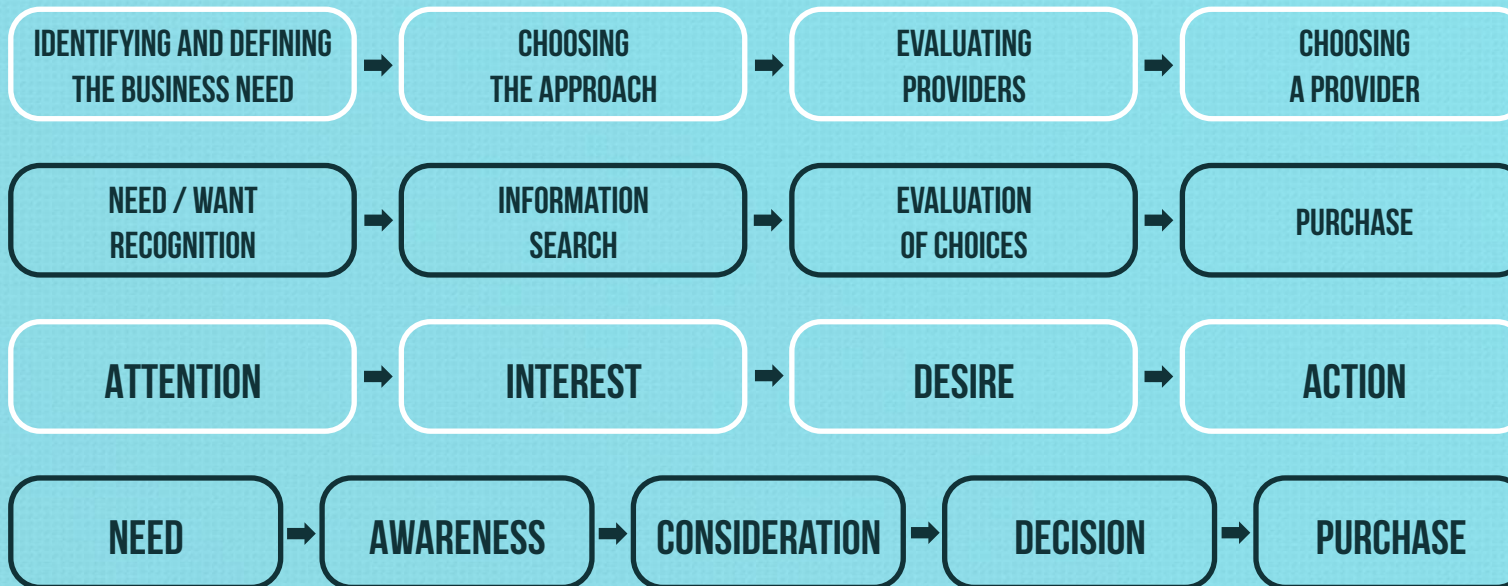
**Start your own path to become a Value Proposition Professional.**

**CHECK OUT THE COURSE!**



# CREATE CUSTOMER-CENTRIC SALES PROCESS

They found your solution so now what? What steps are involved in the sales process? What are the actions? What should the customer experience? **All this needs to be defined in detail.**



- Define customer purchase process.
- Define your process.
- Define what actions needs to be taken to close the deal?
- Create sales tools to help you close deals.

Source: Gartner (June 2011)

# LEARN HOW TO

## Design a Sales Process for B2B Sales



Check out my slideshare that explains how you can create a better sales process and improve your sales result.

[click here](#)

[download a sales process template](#)

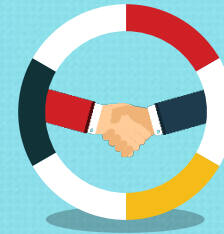


# BENCHMARK COMPETITORS

What are your competitors doing? **Get a deeper understanding** about your competitors Partner Program. What type of partners do they target? How is their program constructed? What are the main benefits for the partners?



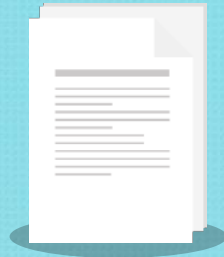
**Understand your competitors  
partner program**



**Understand the relationship your  
competitors have with their  
partners**

# DEFINE TYPE OF PARTNERS

Partnership is all about **building value for your customers!** What type of partners do you want to have a relationship with and how can they be defined? Examples are Distributors, Resellers, Value Added Resellers, Technology Partners, etc. What value do they bring to the customer?



**Define all the type of partners  
that you may work with**



**Customer value is key - Every  
partner must bring a value  
to the customer**



# EXAMPLE

## TYPE OF PARTNERS

### **Value-added resellers (VAR)**

A company that resells software, hardware and/or networking products and provides value beyond order fulfillment.

### **Managed Service Providers (MSP)**

A company that remotely manages a customer's IT infrastructure and/or end-user systems, typically on a proactive basis and under a subscription model.

### **Consultants**

An experienced individual that is trained to analyze and advise a client in order to help the client make the best possible choices.

### **System Integrators (SI)**

An individual or business that builds computing systems for clients by combining hardware and software products from multiple vendors.

### **Original Equipment Manufacturers (OEM)**

A broad term whose meaning has evolved over time. In the past, OEM referred to the company that originally built a given product, which was then sold to other companies to rebrand and resell. Over time, however, the term is more frequently used to describe those companies in the business of rebranding a manufacturer's products and selling them to end customers.

### **Independent Software Vendors (ISV)**

Makes and sells software products that run on one or more computer hardware or operating system platforms.

### **Distributors**

A distributor is an intermediary entity between the producer of a product & another entity in the distribution channel or supply chain, such as a retailer, a value-added reseller (VAR) or a system integrator (SI).

# SUCCESS FACTORS

For the partner sales process.

What are the critical success factors that will enable your partners to **close deals**? You have a defined sales process and type of partners. Now you must define how you can support the partners sales process. What are the critical factors? Is it a Proof of concept? Really good support? Clever pricing structure? Great project management?

- **Define your partners sales process.**
- **Define the success factors for your partners sales processes.**





# DEFINE MOTIVATION DRIVERS & ELEMENTS

Of the Partner Program.



**Motivate partners** to do what you have defined as key success factors.

This step is difficult and you need to **think out of the box**. Maybe you have defined that a Proof of Concept is a key success factor.

So how can you help your partners to do better Proof of Concepts? Is it knowledge? Better project management? IT-tools?

What **motivation drivers and elements can you implement** in your partner program?

Define motivation drivers and elements.

**Define actions** on how you can help partners become better at delivering key success factors.

# EXAMPLE

## PARTNER PROGRAM MOTIVATION DRIVERS & ELEMENTS

### KEY DRIVERS

#### **Educating partners**

There is a lack of knowledge today and the partner program will drive partners to increase their knowledge levels.

#### **Increase sales thru sales activities**

It is believed that this can be done by motivating partners to identify new business in form of leads & projects and by making sure that POCs done are managed as professional as possible.

#### **Improved and certified hardware and software solutions**

It is identified as a risk and sales problem when the solutions are not working properly. The partner program will motivate partners to certify their solutions.

#### **Build new and improved solutions**

By helping partners to cooperate and build improved solutions the value provided to customers will be increased.

#### **Deliver excellent support**

It is a key factor to success that customers will get excellent support both during POC and when contract signed.



# EXAMPLE

## PARTNER PROGRAM MOTIVATION DRIVERS & ELEMENTS

### SECONDARY DRIVERS

#### **Pushed sales process**

That the partner program pushes the Partner through the sales process meaning pushing to follow up, act on leads and close deals.

#### **Inspiration**

Be inspired to focus their time on our solutions and consume our Marketing Content for constant inspiration.

#### **Cooperate with us and build improved solutions**

Work in joint projects with us to build improved solutions that will increase value for current customers.

# DEFINE THE PROGRAMMATIC ELEMENTS

**Define efforts and value.** The Partner program elements define what efforts & values you will deliver to partners and their purpose is to make sure that the partners are truly successful. The elements must create a culture & understanding that you care about your partners and their success.



**Define**  
Programmatic  
Elements



**Fill These Programmatic Elements**  
with a deeper description on how  
they should be constructed



**Free tool**  
**Download** Programmatic  
Elements example list and priority



# EXAMPLE

## PROGRAM- MATIC ELEMENTS

### EXAMPLE 1 | EDUCATION PLATFORM

#### Explanation

- The education platform delivers education and knowledge to partners in form of text, video, papers, etc.
- There will be partner certification where partners will be required to take a test to certify knowledge level.
- Certification is required for partners to reach a higher level in the partner program.

#### Why is this important

- More knowledge leads to a more professional and quality assured customer experience of the sales process.
- It will ensure that the success rate of closing deals increase.
- It will help partner to better qualify business.

# EXAMPLE

## PROGRAM- MATIC ELEMENTS

### EXAMPLE 2 | DEVELOPMENT FORUM

#### Explanation

- For integration partners it is important to have full access to our technical platform to create new solutions, improve and manage current solutions.
- The development forum consist of manuals, APIs, technical documentation, support and a forum where issues can be discussed in the open.

#### Why is this important

- This will help partner to build new and improved solutions.



# EXAMPLE

## PROGRAM- MATIC ELEMENTS

### EXAMPLE 3 | LEAD GENERATION PLATFORM

#### Explanation

- Leads generated will be distributed to partners.

#### Why is this important

- Small deals are better handled by partners that have efficient sales processes to handle small deals.
- Some partners will better manage the sales process and can bring higher value to the potential customers and therefore the likelihood to close the business increase.

# EXAMPLE

## PROGRAM- MATIC ELEMENTS

### EXAMPLE 4 | SUPPORT PLATFORM FOR PARTNERS

#### Explanation

- Partners need to have full access to support manuals, instructions, videos, forums, etc.

#### Why is this important

- Customer support is identified as a key factor for success. It is important that the customer experience excellent support during Proof of Concept phase and after sales phase to make sure that deals are not lost.



# DEFINE RESPONSIBILITIES & EXPECTATIONS

**You and the partner are a team.** Now it is time to decide who is responsible for what. Focus on the customer experience and define all activities and categorize them.



## Define

Activities that needs to be done by partners and by you

### Example

marketing

sales

pr

support

branding

etc.

Make all these activities granular enough so they can all be assigned to either you or the partner.

Also make sure that you define expectations. What do you expect from partners & what can they expect form you.



## Assign

Responsibility for activities between partners and you and define expectations

# EXAMPLE

## EXPECT- ATIONS

### WHAT THE PARTNER CAN **EXPECT FROM YOU**



Deliver **pre-qualified leads**.



Deliver **professional & knowledgeable support** during pre- and post- sales process.



Deliver **education programs** that helps the partner to understand the possibilities.



Provide **a certification program**.



Provide a best of breed **solutions**.



**Create events & programs** that help partners to connect and start to build better solutions that provide more value for customers.



# EXAMPLE

## EXPECT- ATIONS

### WHAT YOU **EXPECT FROM THE PARTNER**



Partner will help to **grow the business through sales** and marketing activities.



To focus on the customer and **deliver excellent solutions** that deliver true value for the customer.



To **be knowledgeable** and constantly evolve with the market.



**Attend events & connect** with other partners with the intention to build improved and new solutions.

# DEFINE A FRAMEWORK

Should you have partner levels?



Define your partner program levels

Define what responsibilities and benefits that comes with each level

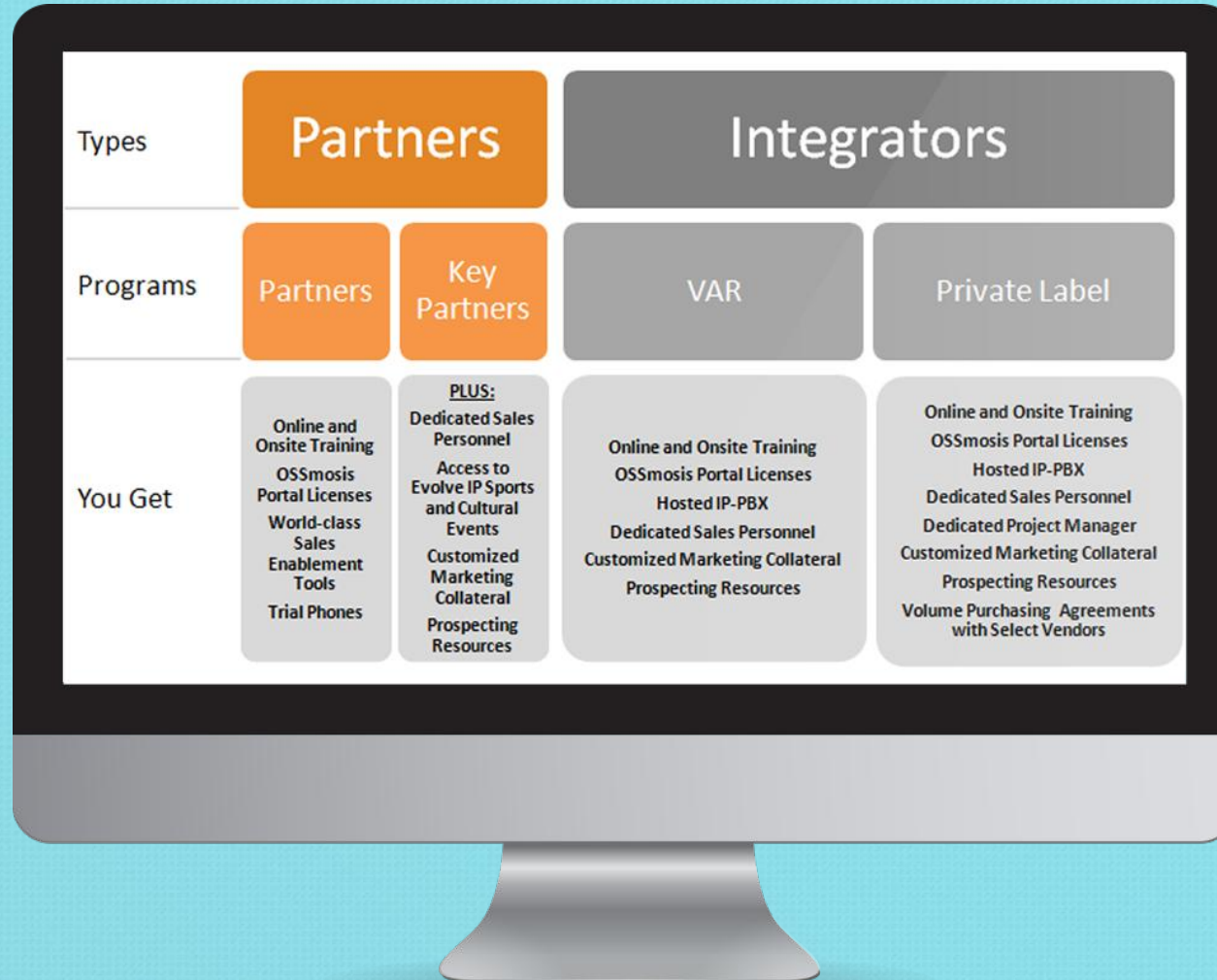
Most partner programs have **different levels**. This type of framework is used to define what partners that are more involved in your partner program.

It is also used as a **way to motivate partners**. For an example by joining the education program and getting certified the partner can achieve a higher partner status and get more benefits.



# EXAMPLE

## EVOLVE PARTNER PROGRAM



# EXAMPLE

## ACCELERYS PARTNER PROGRAM

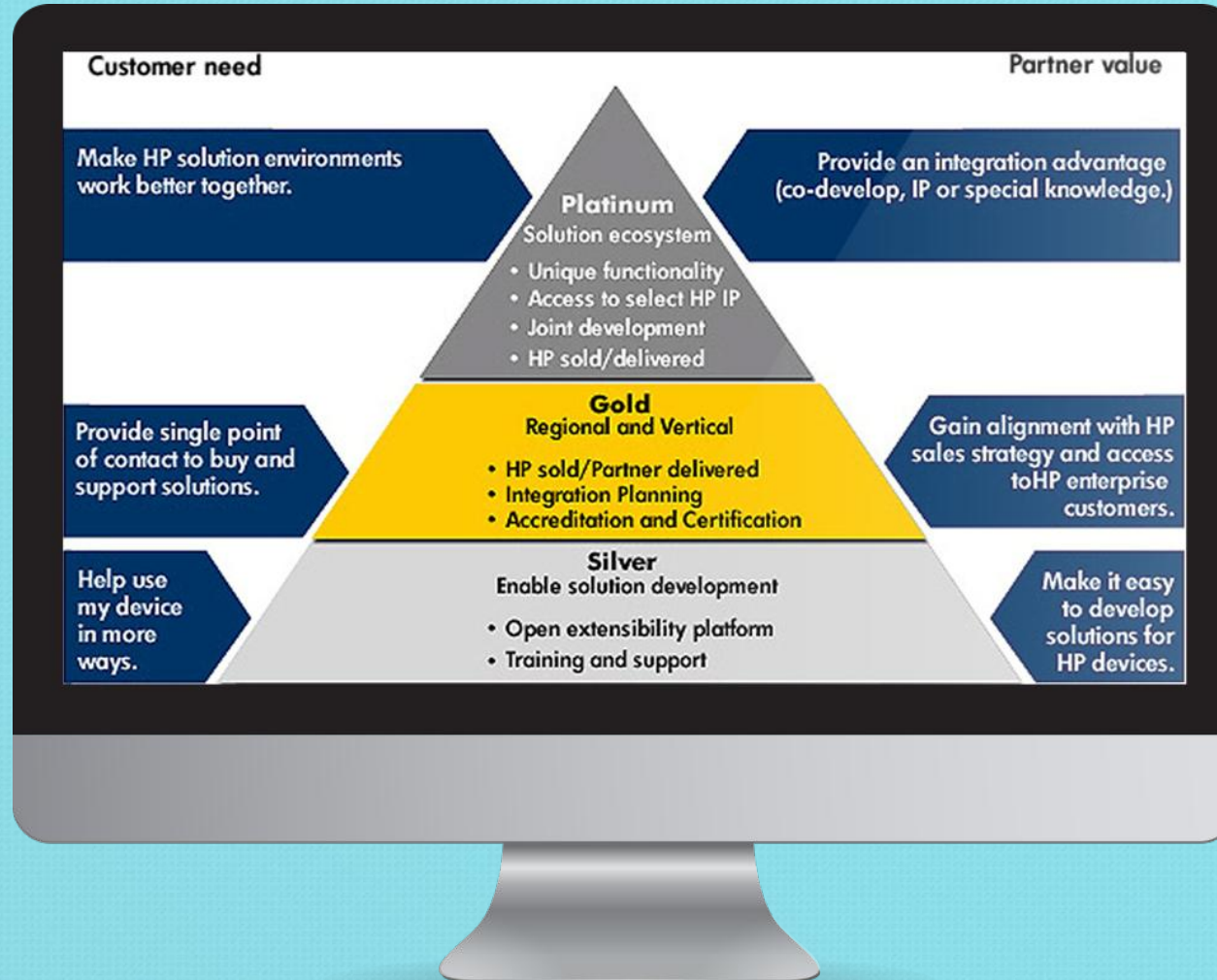


accelrys		Silver	Gold	Platinum
	<b>Enablement Benefits</b>			
	• Access to Accelrys Partner Portal	Yes	Yes	Yes
	• License and Software Download	Limited	All	All
	• Discounted Technical Training	Yes	Yes	Yes
	• Participate in Product Roadmap and Technical Exchanges	Yes	Yes	Yes
	• Access to online Product documentation	Yes	Yes	Yes
	<b>Marketing Benefits</b>			
	• Partner Branding and Logo Usage	Yes	Yes	Yes
	• Partner presence on Accelrys Partner website	Yes	Yes	Yes
	• Accelrys User Conference Exhibiting and Sponsorship	\$\$	\$\$	\$\$
	• Jointly branded collateral	-	Yes	Yes
	• Participate in product launch events and seminars	-	Yes	Yes
	<b>Sales Benefits</b>			
	• Customer referrals and sales lead registration	Yes	Yes	Yes
	• Participation in Accelrys Sales Kick Off	-	-	By Invitation
	• Sales Training	Yes	Yes	Yes
	• Teaming Agreement (Consulting partners only)	Yes	Yes	Yes



# EXAMPLE

## HP PARTNER PROGRAM



# EXAMPLE

## CRYPTZONE PARTNER PROGRAM

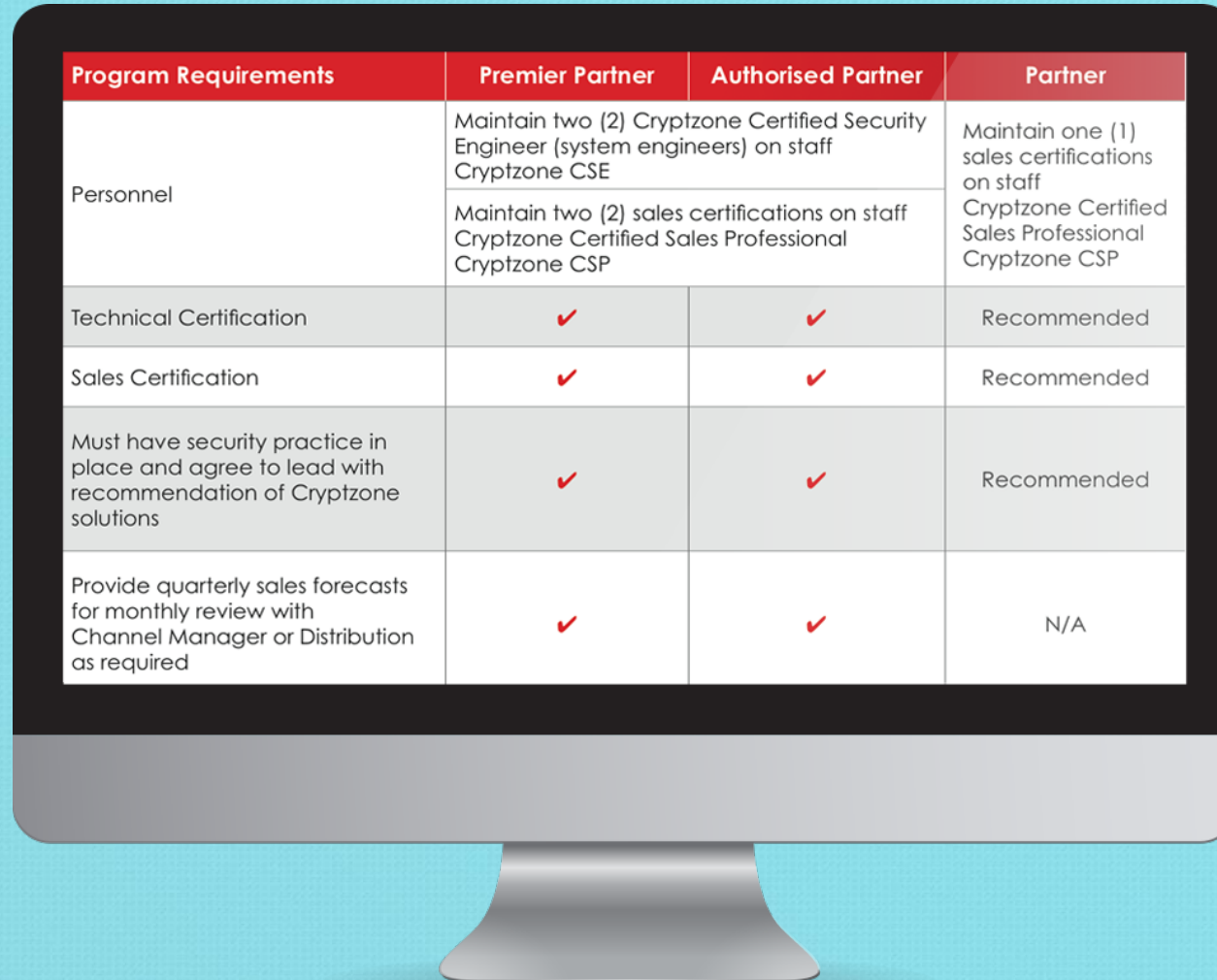


 Cryptzone™			
Program Requirements	Premier Partner	Authorised Partner	Partner
Required Revenue Commitment	✓	N/A	N/A
Partner Program Registration	By Invitation Only	By meeting criteria	Application
Maintain Company Profile in on Cryptzone Website	✓	✓	✓
Partner Agreement / Contract signed as appropriate	✓	✓	N/A
Participate in Quarterly Business Review	✓	N/A	N/A
Provide Quarterly Business Plan	✓	N/A	N/A



# EXAMPLE

## CRYPTZONE PARTNER PROGRAM



Program Requirements	Premier Partner	Authorised Partner	Partner
Personnel	Maintain two (2) Cryptzone Certified Security Engineer (system engineers) on staff Cryptzone CSE		Maintain one (1) sales certifications on staff Cryptzone Certified Sales Professional Cryptzone CSP
	Maintain two (2) sales certifications on staff Cryptzone Certified Sales Professional Cryptzone CSP		
Technical Certification	✓	✓	Recommended
Sales Certification	✓	✓	Recommended
Must have security practice in place and agree to lead with recommendation of Cryptzone solutions	✓	✓	Recommended
Provide quarterly sales forecasts for monthly review with Channel Manager or Distribution as required	✓	✓	N/A

# EXAMPLE

## CRYPTZONE PARTNER PROGRAM



	Program Requirements	Premier Partner	Authorized Partner	Partner
	Marketing COOP funds	4%	2%	MDF on Application
	Account Management from Cryptzone	Yes	No	No
	Account Management from Distributor	No	Yes	Yes
	Targeted rebate program	Yes	No	No
	Additional Discount on New Business	Yes	Yes	No
	Additional Discount on Support for taking first line	Yes	Yes	No
	Leads from Cryptzone	Yes	Yes	No
	NFR license for internal use free of charge	Yes	Yes	Yes
	Quarterly conference call with product VPs	Yes	No	No
	Advanced access to Cryptzone Support database	Yes	No	No



# BUILD INTERNAL CAPABILITIES & SYSTEMS

Build your Partner Program elements and add supporting systems.



**Create a list** of everything you need and start to execute

**Create a list** of everything you need to build your partner program and **start to execute on it**. This probably means you need to **create brochures, marketing material, processes**, etc. **Implement IT-systems** that will help you to support your partner program. This is a very **important step** since it will greatly **help you in the future** when you manage hundreds of partners.



**Implement IT-systems** that will help you support your Partner Program

# EXAMPLE

## WHAT NEEDS TO BE PRODUCED

### About the program – General documentation

- Partner Program Operation Plan - Resources, time, organization chart, Systems, Sales.
- Marketing.
- Legal Agreements.
- Internal Power Point Explaining the program.
- Account manager expectations on partners.
- Internal manual for partner program.
- Information on how partner can get presales help and support.
- Information on how to manage leads and what is expected by partners.
- Partner Selection Matrix.
- Partner Program Roadmap presentation.
- Co-op fund structure.

### Marketing

- External Sales Power Point to explain the program.
- Partner Certificate.
- Training Certificate.
- 2-page brochure explaining the partner program.
- Webpage where the Partner Program is explained and marketed.
- All marketing material that will enable partners to sell the solutions.
- Write specifications, select and implement IT-system for a Partner Portal where partners can log in to get access to all material.



# EXAMPLE

## WHAT NEEDS TO BE PRODUCED

### Education Platform

- Create a specification for an IT-system that can host the education platform.
- Select IT-system and implement it.
- Establish training and certification curricula.
- Produce training material in the form of videos, presentations, text etc.
- Create tests so partner can certify their knowledge level.

### Development Forum

- Write specifications, select and implement a development forum in the partner portal.
- Make APIs available in the forum.
- Add manuals and instructions in the forum for how to use the API.
- Add examples of how to use the API in the forum.
- Add Get Started Videos to the forum.

# EXAMPLE

## IT-SYSTEMS FOR PARTNER MANAGE- MENT

There are many IT-systems to manage partners but the **best solution** is to **integrate it into your current CRM system**. Below you have **two examples** of the worlds **most used CRM systems**:



**More info** [here](#)

- This is an excellent CRM system to manage sales and it also contains the possibility to add support for Partner Management. More info [here](#).
- With this add on you can manage partner leads, contacts, accounts, opportunities, etc. You can also see sales dashboards, track activity, track certifications, use the built in Partner Portal, etc.



**More info** [here](#)

- This is an excellent CRM system to manage sales but it also contains the possibility to add support for Partner Management.
- With this add on you can manage partner leads, contacts, accounts, opportunities, etc. You can also see sales dashboards, track activity, track certifications, use the built in Partner Portal, etc.



# EXAMPLE

## IT-SYSTEMS FOR EDUCATION MANAGE- MENT

Video is a very **popular way** to **deliver knowledge & information** to partners. They are **easy to create** at a **low cost** and gives the opportunity to **really explain your story**.



[More info here](#)

An amazing solution that makes it easy to conduct live training sessions for an world wide audience at a low cost.



[More info here](#)

Integrates with NetExam & Salesforce, & can manage up to 1000 people at the same time.



[More info here](#)

Plug-in for Sales Force. Customer & Channel Partner Training & Certification solution.



[More info here](#)

Online training solution.



[More info here](#)

Online training solution.



[More info here](#)



[More info here](#)

# EXAMPLE

## IT-SYSTEMS FOR SUPPORT

Great **support** is usually a **key factor** for a successful partner relationship. **Selecting an IT-system** that really **can support your needs** are important.



[More info here](#)

### Benefits

- System integrates into salesforce.com.
- You can grow with the solution.
- System offers Knowledge Base, support community, One-One support through any channel including social media, smart ticketing system, automated answers, ability to publish tickets into KB articles, customer profiles are imported from Salesforce, smart search for old solutions, tools to measure customer satisfaction.
- Can be integrated with JIRA (see [here](#)).
- 59 USD per agent and month.



salesforce

Salesforce support.

[More info here](#)

 **satisfaction**

Price 49 USD per month.

[More info here](#)



# DEFINE HOW TO MEASURE SUCCESS

If you don't measure how will you know what works?



**Implement several KPIs** and other values that will **measure your success**.

The KPIs should be created from the perspective of what you defined as the success factors for your partners. Example: If it is education it will be important to measure how many partners that have participated in your education program.



**Define KPIs & Start**  
To measure  
your success



**Make sure**  
That your selected  
IT-systems automatically  
measures the KPIs

# DEVELOP A MARKETING STRATEGY

To help your partners.



Use the SOSTAC Model!  
Use the SOSTAC model  
to get going fast.

[click here](#)

- **Create a clear audience target.**
- **Plan using RACE, 5Ss, 5Ps to structure thinking.**



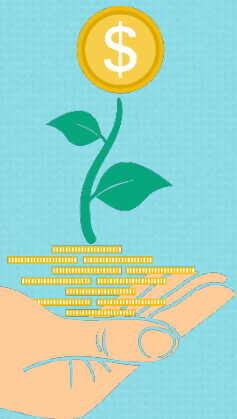
# CREATE A PARTNER SELECTION STRATEGY

Don't waste time on partners that cant bring value to the customer.

Each new **relationship is an investment** and it is important that you **define characteristics or attributes** of the **ideal channel partner** required to address a particular market segment.

This will help you to **decide what partners you would like to invest in** and **build a deeper relationship** with. Define how many partner you should recruit and set a target.

- Define characteristics or attributes of the ideal channel partner.
- Define your partner capacity and decide how many partners you will recruit.
- Free tool - **download** my partner selection matrix.



# BUILD A FOCUSED PARTNER ORGANIZATION

It is key to decide & clearly communicate who is responsible for what.



Beyond systems, there is the **human element** to building a successful partner program. It is important that **the structure** of any partner organization **be rooted in the philosophy** that members of the partner team remain connected to many different internal organizations in order to deliver desired results.

Building, maintaining and growing a healthy channel ecosystem **requires input** from all parts of an organization.

- Define a focused partner organization and clearly communicate responsibility.
- Make sure your partner organization have full access to the rest of the organization.



# **SOME ADVICE BEFORE YOU START**



# 9 SUCCESS FACTORS FOR YOUR PARTNER PROGRAM

- 1 Remember to keep the customer front and center**  
Every investment you do should in the end benefit the customer.
- 2 Match your solution to the proper channel**  
This includes all your marketing material and information.
- 3 Communicate often**  
Make sure that partners have all the information they need to become successful.
- 4 Monitor and measure the program**  
There are always room for improvements.
- 5 Resist making frequent changes**  
It takes at least 90 days after signed contract before you can expect to see any sales at all. Don't change your program too often. Instead focus on your program elements and how to deliver them even better.



# 9 SUCCESS FACTORS FOR YOUR PARTNER PROGRAM

- 6 Be clear about what the partner should do**  
Make sure that your expectations are clear and that they are aligned to the partner's business model.
- 7 Support partners before, during and after the sale**  
With technical and sales assistance to help them grow their business.
- 8 Monitor your competitors**  
Your partner will meet your competitors so make sure you keep them educated & informed.
- 9 Launch and work with a partner council**  
Representing a cross section of partners to help you to keep a finger on the pulse of your channel's satisfaction.

# 6 POTENTIAL FAILURE POINTS FOR YOUR PARTNER PROGRAM

## 1 **Once you have created your program you stop to improve it**

A successful partner program demands constant engagement and improvements.

## 2 **Lack of clarity**

Make sure that you have truly defined what you want your partners to do and that they are motivated.

## 3 **Geographic diversity**

Beyond the obvious differences between mature and emerging markets, there lie governmental, financial and cultural differences. Consider these when designing a first-time channel program.

## 4 **Investment in systems and resources**

Without the appropriate allocation of resources, even the best program can't come to life. While you can outsource some areas to deliver various pieces, internal resources are still required.

## 5 **Diverse channel ecosystem**

Each partner type has unique requirements, expectations and perspectives. Be flexible with systems, programs & sales initiatives to maximize investments across a greater partner base.

## 6 **You have not signed up the right partners**

The partner you have signed up fails because there is a mismatch between expectations and the partners business model.



# DOWNLOAD

## MY FREE TOOLS



### Partner Selection Matrix

Use this tool to understand if a partner is right for you.

[Download here](#)



### Example sales Process

An example on how a sales process can look like.

[Download here](#)



### Program Elements

A list I created where you outline all possible elements and then rank them on how important they are.

[Download here](#)



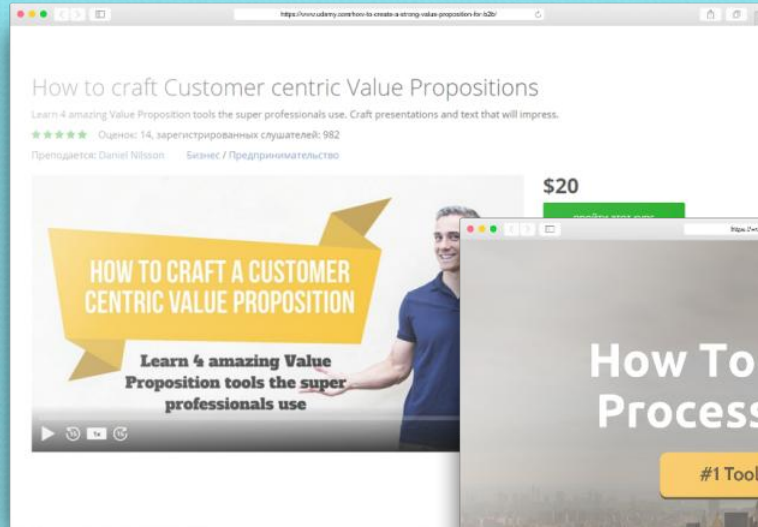
### To Do List

A simple to do list when you are building all material you need.

[Download here](#)

# DOWNLOAD

## MY FREE TOOLS



[Download here](#)



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# EXAMPLE

## OF PARTNER PROGRAMS



[More info here](#)



[More info here](#)



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# WHAT PEOPLE SAY

**Sebastian Tan**



Luckily I found your sharings online, such as '12 steps to build a professional Partner program', which I printed out as my bible now! Thank you for your generous sharing, and hope you have still been working on fantastic projects.



**Mary Samson**



Thank you! Exactly what I was looking for.... just started heading up sales at an agency and trying to craft their story, needed some basics and these are just what the Dr ordered!



**Casper Gerner**



I just wanted to thank you for making your work public. I got our partner program presentation from slideshare.net and have used it as inspiration for further development of our company's partner program.





# THANK YOU

**Daniel Nilsson | Growth Strategist**



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