

## CRM, PRM, BRM, BI or others... What do you need to manage your indirect sales organization?

A lot has been written about technology stacks for indirect sales. There's often a misconception of which systems provide what service. To keep a high-level overview we listed the most common systems out there being used by the best partner organizations.



### Customer Relationship Management (CRM)

#### What?

- Repository: centralizing end-customer data
- Funnel steps: managing pipeline and opportunities
- Reports: having a system of records and reporting

#### For whom?

- Direct sales teams: funnel management, deal regs, contacts...
- Indirect sales teams: deal regs, partner account data, contacts



### Partner Relationship Management (PRM) or portals

#### What?

- Marketing collateral: share partner documents
- Deal registration
- Portal support: centralize admin

#### For whom?

- Indirect sales teams: replaces portal functions
- Marketing teams: share partner collateral and support for campaigns



### Business Relationship Management (BRM)

#### What?

- OKRs (Objectives & Key Results) for Joint action and partner planning
- Shared space: partner commitment & accountability
- Partner Success Measures: predictable partner relationships

#### For whom?

- Indirect sales teams: automate onboarding and partner planning
- Marketing & enablement: follow-up on programs and training
- Leadership: provide insight in leading and lagging success factors



### Business Intelligence (BI)

#### What?

- Centralizing data that exists throughout organization
- Uncover Business insights
- Creating dashboards and visualizations

#### For whom?

- (In)direct sales: actionable sales insights and forecasts
- Marketing: data-driven GTM strategy



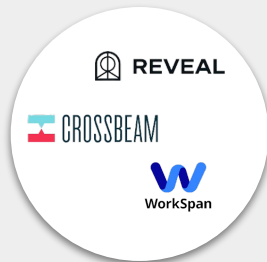
### Marketplace technology

#### What?

- Marketplace: 3rd party plug-and-play solution for your own marketplace
- Partner selection
- Partner rewards

#### For whom?

- Indirect sales teams: white labeled market place
- Marketing: automated partner directory



### Partner Ecosystem Platform (PEP) & Management

#### What?

- Data escrow
- Account mapping: identify overlaps in customers, opportunities and leads
- Co-selling: execute co-selling and marketing efforts on account level

#### For whom?

- (In)direct sales teams: identify co-sell opportunities
- Marketing: data sharing & account based marketing



### Integration Platform as a Service (IPaaS)

#### What?

- Integrate: of-the-shelf connectors in between applications
- Build: configure standard integrations
- Monitoring: manage integrations

#### For whom?

- (In)direct sales teams: make data available to get more from tech stack
- Marketing: clean data availability and automation flows



**Fundamentals:** Get the basics right and install the right (end-)data in your CRM/BI. Develop the supporting (business) plans and create the accountability you need to achieve your KPIs with OKRs (BRM)

**Professional:** Grab (joint) opportunities, follow up and collaborate on mutual accounts, professionalize your partner tech with PEP

**Advanced:** Install your portal, marketplace and streamline co-selling with partners

**Qollabi is a partner collaboration solution you can trust to gain more from your channel partners.**

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