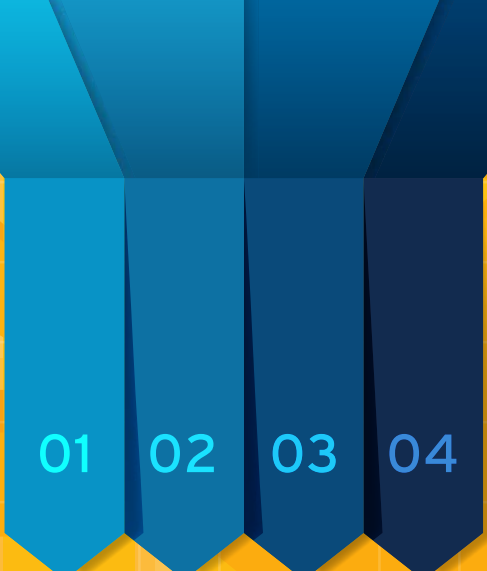




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4 SIMPLE STEPS

TO DRIVE CHANNEL SALES

WITH RULES-BASED LEAD DISTRIBUTION

KEY CHALLENGES/OVERVIEW

Successful partner ecosystems often include passing leads to channel partners. But passing leads without the proper infrastructure can diminish the value of the leads being distributed. To get the best returns on distributing leads, the activity on the leads needs to be tracked – and leads not going to close immediately need to be put into a nurturing process. This simply doesn't happen when leads are passed as one-offs, or are distributed in Excel spreadsheets. Similarly, deal registration and Partner Relationship Management (PRM) systems are limited. Contrary to what their marketing materials might promise, adoption of these systems is poor and visibility remains problematic, which leaves channel partners without the tools and qualified leads they need to succeed.

After working with nearly 10,000 resellers in 130 countries, Zift Solutions has seen these challenges first-hand. In order to effectively connect with prospects and clients and close more deals, today's channel partners need their suppliers to:

- Provide leads directly to staff (partners/dealers/distributors, etc.) with the details needed to effectively kick off the sales process.
- Deliver complete, ready-to-run campaigns that align with current sales incentives.
- Eliminate resource requirements to personalize and use supplier nurture marketing.
- Automate reporting to track ROI on marketing activities and opportunities.

Without support from suppliers in these key areas, channel partners will remain constrained in their ability to connect with prospects and drive sales. Out of all of these channel partner requirements, the demand for Sales Qualified Leads is perhaps the most pressing. Channel partners need leads, complete with prospecting details, reliably delivered to the right people at the right stage in the sales process with clearly defined reporting mechanisms enabled. Automated rules-based lead distribution can help suppliers and their channel partners provide this lead information and reporting, thereby establishing a more collaborative and successful sales process. Read on to learn the four simple steps to drive channel sales with rules-based lead distribution.

STEP 1. AUTOMATE LEAD DELIVERY

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By automating lead delivery, suppliers can help their channel partners increase conversions, visibility and engagement. Automation removes the barriers that often stand in the way of getting leads to channel partners on a timely basis. It also provides an opportunity to share detailed background information on each lead, which partners can use to plan for and have the best sales call possible the first time around.

For the best results, suppliers should follow these Lead Automation Best Practices:

- Leverage rules-based distribution of leads to partners consistently via email or integration with Marketing Automation (MA)/Sales Force Automation (SFA) systems already in place.
- Maintain the data privacy partners want to protect their client base.
- Allow partners to choose how they receive the leads. This is crucial. Don't ask them to log into your CRM. Deliver leads to them how they want them – within their own tools and mobile devices.

Why this model works:

- It's easy for partners. (Simple is always best!) They no longer have to search for leads or manually enter information into their CRM systems.

- Doesn't require any changes in partner behavior: No logging into portals or PRM's – they don't work anyways.
- Provides a consistent, rules-based model for working with all partners.
- Delivers relevant marketing details about leads, making it easier for partners to close business.
- Increases adoption, usage rates and success.

When you automate lead distribution, consider these elements as baseline for success:

- **Determine Lead Distribution Workflow:** While automated rules-based lead distribution makes it easier for both suppliers and channel partners, it is a process change and should be well defined from the start. Suppliers need to select the right data to pass to their partners, which may include lead profile data (name, company, contact info, etc.) along with lead history (campaign, emails opened/clicked, what was viewed on the website, etc.). Suppliers should also establish lead routing rules, so that the right leads get to the right people at the right time. Rules can be as sophisticated or simple as a supplier chooses but they should be consistent, so that leads are routed and delivered via a common methodology. Once suppliers onboard their partners, rules can be modified based on early feedback to enhance results and improve visibility.

STEP 1. AUTOMATE LEAD DELIVERY

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- **Establish a Baseline:** A best bet for rules-based lead distribution is to establish a baseline and start simple with leads sent to partners via email, where they can manage and assign them to sales reps. With the right system, channel representatives can accept or reject leads within the email and suppliers can configure follow-up touches based on those actions. For example, a supplier can follow up with an email seven days after a lead is sent over asking for information about why a partner accepted or rejected a lead. Plus, suppliers can choose to share as much or as little data around leads as they desire to support sales efforts.
- **Move to Full Automation at the Right Time:** When channel partners are ready, they can choose to transition to full automation and have leads delivered directly into their own Sales Force Automation (SFA) or Customer Relationship Management (CRM) systems. Suppliers interested in enabling their partners to turn on full automated rules-based lead distribution should look for solutions that integrate seamlessly with the most popular CRM and SFA tools, including Sage, Salesforce, Microsoft Dynamics, Sugar CRM and more. By giving partners access to leads within the systems they use most, they can dramatically improve results without altering their behavior.

Using a well-established system and these best practices to introduce automated delivery of sales-qualified leads, suppliers can eliminate the barriers partners currently have in converting leads to customers. Partners are immediately armed with qualified leads coupled with data relevant to sales calls and can make more informed decisions, better nurture prospects and close more deals. Plus, suppliers can improve visibility across the lifecycle of a lead and finally know exactly what happened to all of those qualified leads they provided to their partners.

IDEA TO CONSIDER



CONSIDER SENDING A FOLLOW UP EMAIL FIVE TO SEVEN DAYS AFTER A LEAD IS SENT TO THE PARTNER TO GAIN INSIGHT INTO WHY THE PARTNER ACCEPTED OR REJECTED THE LEAD.

STEP 2. IMPROVE LEAD QUALITY

01 02

Once lead distribution is automated, it is incumbent upon suppliers to provide the very best lead data to their channel partners. Without the proper context and supporting data, partners simply don't have the right information to follow up with leads or nurture them effectively. (See section on *The Importance of Lead Nurturing*)

With the right tools, today's suppliers have the ability to collect and share a wide range of data regarding prospects and customers digital body language to improve lead quality details.

When suppliers pass leads to partners, they should be accompanied by actionable information. This not only includes the contact basics, such as name, title, email address and phone numbers, but also details regarding the specific products in which a prospect is interested, recent online activity, previous marketing activities used to qualify leads and any marketing materials they have accessed or downloaded. The right tools allow suppliers to share rich data, including when a lead visited a website, exactly which pages they viewed and links to specific pages, revenue bands, contract stipulations and more. This type of data arms partners with key insights they can use to initiate a call and present themselves as experts on known topics of interest to prospects. Plus, partners can make the best possible approaches to prospects depending on where they are in the sales cycle.

To further empower partners and maximize results, suppliers can and should continuously improve the type and quality of lead data passed to partners. Timing is also an essential consideration. Every industry is unique and the proper timing of lead delivery along with the type of data that should be shared with partners varies greatly. For example, a manufacturing firm selling high-cost equipment may have a much longer sales cycle than a software reseller. The manufacturer may choose to send leads over to their dealers only after a prospect makes multiple website visits, downloads a product prospectus and opens or clicks through from an email newsletter. On the other hand, the software company with lower-priced products that sell quicker may consider leads ready to be tele-qualified by a partner after just one website visit or download. Suppliers can leverage feedback from marketing automation tools or their partners to hone in on the optimal point in the sales process to share qualified leads along with the appropriate supporting data to garner the best results.

IDEA TO CONSIDER

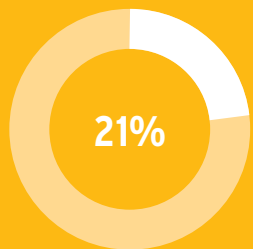


IMPROVE LEAD FOLLOW UP FOR PARTNERS BY INCLUDING RICH DATA SUCH AS WHEN THE LEAD VISITED A WEBSITE, PAGES THEY VIEWED, LINKS TO THOSE PAGES, ASSETS THEY DOWNLOADED, ETC.

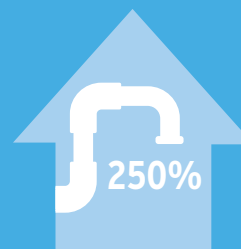
THE IMPORTANCE OF LEAD NURTURING

The Internet has changed the sales process. Prospective customers are better informed, enter the sales cycle later and are armed with more information than ever before. Today, it takes multiple marketing touches before a prospect will engage with a sales representative and most prospects need direct, continued nurturing to be converted to customers. Unfortunately, channel partners often don't know exactly how to nurture good leads that need more time to develop.

INVESTING IN LEAD NURTURING IS CRITICAL AND IT SHOWS:



According to Forrester, lead origination and lead nurturing now accounts for the largest component of B2B marketing spend at **21%** of overall B2B marketing budgets.¹



This investment pays off as demonstrated in a recent case study, which showed that effectively nurturing leads who aren't initially ready to buy can increase pipelines by over **250%**.²

An ongoing, nurturing strategy supported by an automated touch process is the best way to capture these opportunities and generate sales at lower costs. By automating lead distribution and other key marketing activities, suppliers can help partners stay in close contact with leads throughout the sales lifecycle. With rules-based lead distribution and an integrated marketing platform, suppliers establish themselves as a primary resource for their channel partners. Best of all, channel partners get the continuous information and insight they need to establish themselves as subject matter experts.

¹ Marketo, Inc. MobileIron Case Study. Available at <http://www.marketo.com/customers/case-studies/mobileiron.php>.

² Forrester Research, Inc. The State of Lead-To-Revenue Management. July 2012. Available at <http://www.forrester.com/The+State+Of+LeadToRevenue+Management/fulltext/-/E-RES71381?ai=0>

STEP 3. CLOSE THE LOOP

01 02 03

After automating lead distribution, suppliers should leverage enhanced visibility into partner sales activities to measure results and track their Return on Investment (ROI). Selected solutions should illuminate what partners have done with the leads passed to them and link KPIs to reporting and analytics regarding lead acceptance rates and pipeline. Ideally, suppliers should have direct visibility into:

- The leads provided to partners.
- Where leads are in the pipeline process.
- Which activities/campaigns generated the leads.
- What partners are doing with leads e.g. conversion rates.
- How much was spent generating and delivering leads to partners.

Using this expanded insight, suppliers can close the loop between themselves and their partners and better determine the most effective areas on which to spend their time and money.

Suppliers should also allow for ongoing changes to lead distribution and marketing efforts based on quantitative feedback from their partners, which may be provided via:

- **Opportunity Summary Report:** Once leads are distributed to the partner, suppliers should be able to continue to monitor them throughout the sales process. Be sure to deploy a system that makes it easy for suppliers and partners to produce and share opportunity summary reports. Systems should match policies to maintain partner privacy and assist both suppliers and partners in focusing on what matters most: creating a collaborative and supportive sales process that converts leads into customers. With the right solutions, suppliers can stop asking, “What ever happened with that lead” and shift their attention to asking, “What else can we do to help you convert leads to sales.”
- **Lead/Opportunity Updates in Supplier Systems:** Some systems can update event details within a supplier’s MA and SFA systems, so that suppliers can see partner name, status of leads and the partner’s reasons for accepting or rejecting a lead within the systems they already rely upon. Automated reporting and continual record updates save time and provide unprecedented visibility into the digital body language of a lead, enabling intelligent conversations based on actionable information between suppliers and their partners.

STEP 4. FOLLOW BEST PRACTICES

01 02 03 04

READY TO INCORPORATE RULES-BASED LEAD DISTRIBUTION INTO YOUR CHANNEL MARKETING AND SALES PROCESS?

Follow these best practices to ensure success:

- **Build Excitement:** Clearly explain the time savings, overall benefits and ease of automating lead distribution to partners. Share early success stories to generate excitement across your entire partner community.
- **Launch a Well-Defined Campaign:** Make sure that you have a well-defined campaign in place to drive leads that is relevant to your channel partners and aligned with current sales incentives.
- **Set Clear KPIs and Build Success Metrics:** Initial KPIs may include response turnaround/time of acceptance to lead, lead feedback and opportunity creation. KPIs should demonstrate how quickly partners view and act on the leads provided to them. Build success metrics using partner feedback regarding a supplier's ability to deliver the right leads to partners, with the right data at the optimal time to engage prospects and close deals.
- Expect partners to be accountable, participate fully in the process and testify to their success. Good news travels fast. This is critical to scaling the solution and building excitement across your channel partner community. If a partner is unresponsive, they should be replaced with a partner that is fully engaged and willing to share success stories.
- Marry lead distribution with other aspects of marketing automation to boost results. Consider Through Partner Marketing Automation (TPMA) solutions that make it easy to:
 - Build Awareness: Syndicate your message across your channel community.
 - Generate Demand: Develop a multi-tactic marketing strategy to generate and nurture qualified leads.
 - Gain Pipeline Visibility: Deliver sales-ready leads to channel partners and support pipeline acceleration.

IDEA TO CONSIDER



START WITH A WELL-DEFINED CAMPAIGN THAT IS RELEVANT TO YOUR CHANNEL PARTNERS, WILL DRIVE LEADS AND SUPPORTS THEIR CURRENT SALES INCENTIVES.

WHY ZIFT SOLUTIONS?

Leading channel organizations around the world such as Red Hat, HP, Sage, Molex and more are using Zift Solutions to increase channel revenue, boost marketing impact and enhance visibility and control. Zift Solutions provides a superior technology platform that automates co-branded marketing, empowers collaborative selling and delivers comprehensive analytics to measure results.

With Zift, suppliers can easily automate lead distribution and track ongoing partner interaction with prospects, including marketing touches and pipeline activities with real-time updates. Our flexible, scalable solutions let you start small

and add functionality as your needs evolve. So, suppliers can utilize rules-based lead distribution on its own or expand capabilities with fully integrated Through Partner Marketing Automation (TPMA) solutions to boost results. Beyond technology, our proven success framework and strategic insight empowers results. Plus, hands-on global support ensures the success of you and your partners.

[Contact us today to learn more about rules-based lead distribution and see how industry leaders and thousands of their global partners use Zift Solutions to capture more channel revenue.](#)

Ready to incorporate rules-based lead distribution?
Contact us today!

919.794.8385