4 CORNERSTONES

OF CHANNEL MARKETING AUTOMATION SUCCESS

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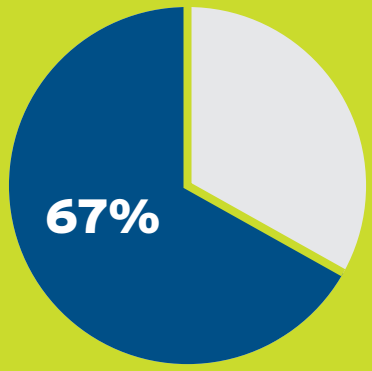
INTRODUCTION

After working with thousands of channel organizations around the globe, we've come to recognize that proper preparation is essential to successfully implement Channel Marketing Automation (CMA). The promise of CMA is certainly impressive. According to Aberdeen Group, best-in-class companies are 67% more likely to use a marketing automation platform[1]. Moreover, 80% of marketing automation users saw their number of leads increase, and 77% saw the number of conversions increase[2]. But those promises can cause companies to rush through what should be a measured decision-making process.

All too often, channel organizations want to hit the ground running with CMA when they're not fully prepared to do so. The result? Their programs falter or fail – even when they procure and deploy the very best technology across their partner community. In this eBook, we'll discuss the four (4) essential cornerstones of CMA success and detail how you can set yourself and your partners up for the best results from the start.



Best-in-Class companies are 67% more likely to use a marketing automation platform.

READ ON TO LEARN MORE ▸

CORNERSTONE #1 VISION & STRATEGY

Organizations interested in Channel Marketing Automation (CMA) typically can be divided into two camps: Those with a clear vision and strategy — and those that are simply deploying CMA technology as a Band-Aid for their problems. The first camp has done the groundwork of identifying their core issues and has a clear vision of what they want to accomplish with the technology. They've mapped out their strategy, defining specific benchmarks and Key Performance Indicators (KPIs) to measure success, before moving forward with CMA procurement and implementation.

The second camp wants to acquire and implement a CMA platform as soon as possible — even before they've nailed down their strategy and without understanding how they are going to leverage or measure new capabilities on their own. Months down the road, someone in the organization inevitably (and rightly) asks: "Why isn't this working? Why aren't we achieving our goals?" Unfortunately, their goals were never fully defined, so no one really knows what they're working toward. Or, "partner engagement" is assigned as a goal post-launch, which will remain well out of reach without focused up-front work. At that point in time, the company is often so overloaded with tactical responsibilities that it becomes very difficult to think strategically. Everyone is disappointed and a measurable return on investment becomes impossible to achieve.

According to international marketing agency Pepper Global's 2014 Marketing Automation report, among B2B marketing managers, the most important criteria for a marketing automation system are (1) price, (2) product integration (e.g., CRM, social, web, mobile), and (3) ease of use.[3]

What they should be focusing on first and foremost is formulating a clear vision and strategy for CMA. Customers with a strong up front vision and corresponding strategy for their CMA deployment, including how to engage and evaluate partners, are the most successful organizations by far.

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Without vision and strategy, CMA programs get off to a very slow start or even fail due to misdirected focus and lack of clearly defined priorities. Moreover, without a clear vision and strategy, any CMA solution will magnify rather than solve problems. If you have a partner engagement issue, or a content generation challenge, for example, and rush to implement a CMA platform, the technology will quickly magnify those issues, making them more visible to a larger audience within your organization. To avoid this scenario, develop and communicate a well-defined strategy that is embraced by the entire organization responsible for delivering against channel marketing initiatives before moving forward with the tactical and operational components of CMA.

CORNERSTONE #2 PARTNER ENGAGEMENT PLAN

Whether or not an organization has a strong partner engagement plan before rolling out any Channel Marketing Automation (CMA) application is a strong indicator of success – or failure. Organizations looking to CMA as a sole means of driving and building partner engagement will likely be greatly disappointed.

To develop a strong partner engagement plan, align your CMA goals and objectives with the actual strength of your current partner relationships as well as the marketing maturity and available resources of your partner marketing organization.

CURRENT ENGAGEMENT LEVEL:

- First, **EXAMINE HOW YOU ENGAGE** with your partners today. Do you have high-touch, close working relationships with your partners? Or, are you just playing more of a "partners-by-the-numbers" game?
- Take time to evaluate and really understand **WHAT "MODEL" YOU CURRENTLY WORK UNDER** and what your definition of success is from an engagement perspective – before moving forward with CMA.
- Organizations with strong ties to their partner communities and **CLEAR COMMUNICATION REGARDING HOW CMA CAN HELP DRIVE SUCCESS** in pre-determined areas (i.e. email marketing, social media, lead distribution) are more likely to see high partner adoption rates, long-term engagement and stronger outcomes.

MARKETING MATURITY:

- Next, **DETERMINE YOUR PARTNERS' MARKETING MATURITY LEVEL**. Do your partners truly understand the value of marketing? Do they have the skill sets to be effective marketers themselves, or do they need someone to teach them how to be effective marketers?

RESOURCES:

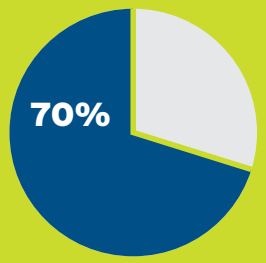
- Finally, do they have the **RESOURCES TO ACTUALLY EXECUTE THE MARKETING PLAN** that they've come up with? What types of resources are required to support your marketing plan? Will those resources come from internal or external resources?

Organizations with strong ties to their partner communities and clear communication regarding how CMA can help drive success in pre-determined areas (i.e. email marketing, social media, lead distribution) are more likely to see high partner adoption rates, long-term engagement and stronger outcomes.

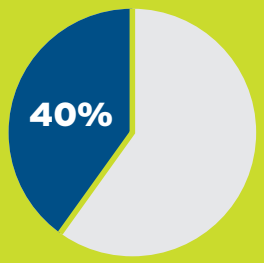
WE FIND THAT MOST SUCCESSFUL ORGANIZATIONS HAVE A TIERED RESPONSE TO PARTNER ENGAGEMENT THAT ALLOWS THEM TO SEGMENT PARTNERS AND REFINE CMA PLANS TO MATCH THE NEEDS OF THEIR PARTNER COMMUNITY.

- **TOP-TIER PARTNERS:** Large channel organizations often have a top-tier partner community, with which they have very close working relationships. These partners understand the value of marketing and generally are large enough to have a marketing staff and available resources to support an array of CMA applications provided by their suppliers. They require minimal support and often achieve the highest rates of success from CMA.
- **GOLD STATUS PARTNERS:** These partners are developing, but haven't quite reached top-tier status. They understand the value of marketing but may lack the resources or training to execute CMA successfully. This partner tier typically requires a support plan and clear communication regarding the benefits and capabilities of CMA so they can use tools to their full capacity and develop into a more mature marketing organization.
- **BEGINNERS AND SOLE-PROVIDERS:** Novice partners and sole providers are more sales and delivery focused. They often have limited understanding of the value of marketing – or automation – and how it can help them. They may be looking to pull marketing pieces, white papers, Excel sheets, etc., off of a CMA platform versus actually having a cohesive marketing strategy – and they will need more support to develop and execute on CMA successfully. Often, these partners need to rely entirely on the supplier to help them build and execute a marketing plan.

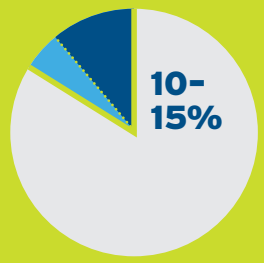
SOME CMA STATISTICS ARE HARD TO IGNORE:



70% of CMA portal solutions will fail[4]



40% of partner portals fail to achieve ROI[5]



10–15% of portal initiatives are abandoned[6]

Disappointing to say the least. The fact is, while billions are spent on CMA solutions and community technologies, partners ignore 50% of supplier content and functionality.[7] Why? They simply do not want (nor do they have the time) to log in and out of multiple systems.

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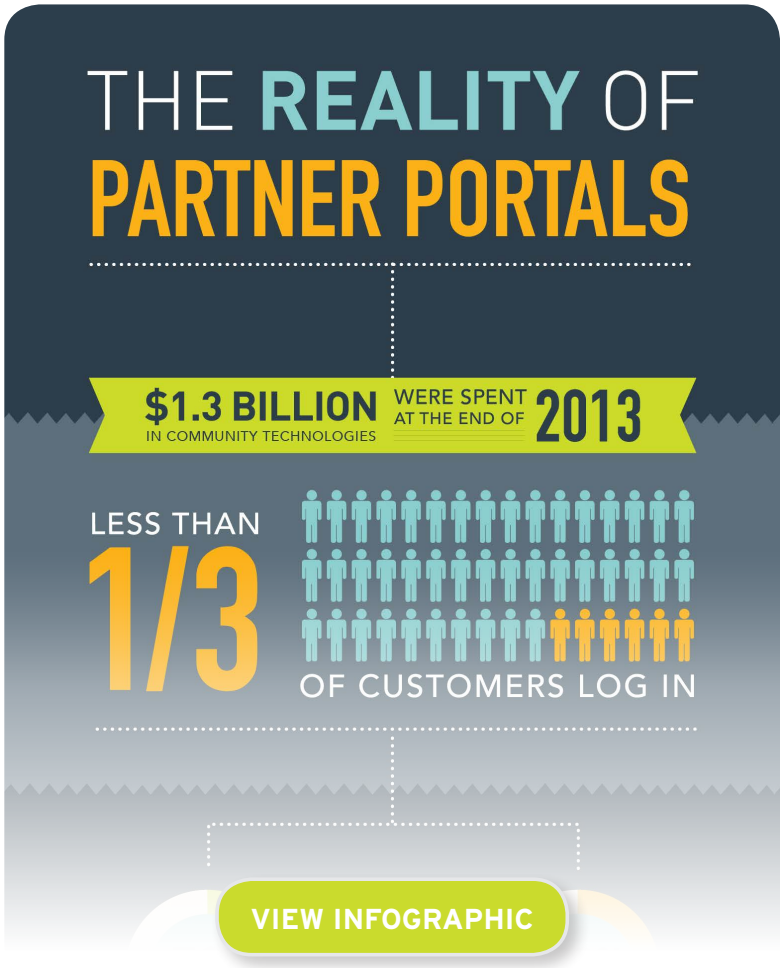
Embedded Access Applications (EAAs) deliver the CMA capabilities channel partners require within the systems they already use every day. EAAs provide direct access to campaign creation and deployment, content, social media, lead distribution and more within the familiar environments of the most popular CRM, SFA and inbound marketing and sales software, such as Salesforce, Marketo, Hubspot, Pardot, Hootsuite, Oracle Marketing Cloud, Constant Contact and Microsoft Dynamics, among others.

By injecting marketing and sales tools into the systems partners already use, suppliers can overcome a variety of CMA hurdles from the start and see much higher adoption rates and ROI on their CMA investments.

LEARN MORE ABOUT EAAS HERE ▸



CORNERSTONE #3 CONTENT DEVELOPMENT & EXECUTION

Determining your partner engagement model will likely guide your vision and strategy regarding content marketing, which is equally important to CMA success. Per dollar spent, content marketing produces 3 times more leads than paid search. Additionally, it costs less than paid search: 31% less for small and mid-sized companies and 41% less for large companies.[8] To capture those leads and capitalize on the cost savings of content marketing, **ORGANIZATIONS REQUIRE A SOLID CONTENT DEVELOPMENT AND EXECUTION STRATEGY**. Without it, your CMA program will likely fail – even with a high level of partner excitement.

Prior to deploying a CMA solution, many organizations have limited visibility into what channel partners are doing or not doing with the content they provide. The most challenging obstacles to success are lack of quality content (40%), budget constraints (38%) and the lack of an effective marketing automation strategy (38%).[9]

Suppliers often spend thousands of dollars to generate content and provide it to partners, typically via downloads on a partner portal. However, they rarely have any visibility into what the partners are actually viewing or how content is being used once it leaves the portal. **A STRONG CMA PLATFORM WILL PROVIDE THAT VISIBILITY AND USAGE TRACKING INCLUDING IF CONTENT IS BEING IGNORED OR MISUSED.** Maintaining a strong content thread keeps partners engaged and coming back to your CMA platform. Once partners start to get an appetite for content, their appetite only grows.

Per dollar spent, content marketing produces 3 times more leads than paid search. Additionally, it costs less than paid search: 31% less for small and mid-sized companies and 41% less for large companies.



IF YOU CAN'T SATISFY PARTNER CONTENT DEMANDS, EVERYBODY STARTS TO FEEL NEGATIVE ABOUT CMA. BEFORE DEPLOYING ANY CMA TECHNOLOGY, YOU'LL HAVE TO ASK YOURSELF A FEW POINTED CONTENT-RELATED QUESTIONS:

- **DO WE HAVE THE CONTENT AVAILABLE** to provide partners with what they are asking for?
- What are the **PRIMARY MESSAGES** we want to convey and what are the best materials to provide to partners?
- Does the **AVAILABLE CONTENT ALIGN** with the company's product marketing methodologies?
- Are product-marketing materials provided **EASY TO CUSTOMIZE** for partner marketing?
- How will partners **ULTIMATELY ENGAGE AND USE THE CONTENT** provided to generate leads and develop a strong marketing presence in their space?
- At **WHAT PACE WILL WE DELIVER** available content to partners?
- Is our product the **CENTERPIECE** of a partner-offered solution or simply an **INCREMENTAL ADD-ON** to a much larger solution?

The answers to these questions will ultimately drive your content strategy and marketing execution calendar. They will also help you determine the level of effort required to properly maintain your content pipeline on behalf of your partner community. Take the last question as an example: Is our product the centerpiece of a partner-offered solution or simply an incremental add-on to a much larger solution? Assessing your product positioning with reseller solution offerings will absolutely impact the "centricity" of message and content design your partners will be willing to leverage. If your product is the dominant element of a partner's offering, then you should provide templates that place your own brand and message front and center. If your product is ancillary to the partner's offering, then the partner's brand and message should be allowed to dominate.

Often, it's impossible to maintain effective content development and delivery on an ongoing basis across all product lines.

Depending on the level of available resources, suppliers may have to make some hard decisions about what products they ultimately want to promote, which partner tiers to support, and how best to curate content, particularly if they have multiple product lines or niche solutions. Often, it's impossible to maintain effective content development and delivery on an ongoing basis across all product lines. When resources are stretched too thin, CMA often fails. If partners don't see the key messages that they want to convey within their market, they will shy away from adopting more generalized marketing plans from their supplier. Instead of trying to generate all content in-house, suppliers may choose to bring in third-party agencies to help with content curation and collection. Once content is developed or sourced, it can be applied and directed to partners very easily via CMA.

CORNERSTONE #4 CMA PLATFORM OPERATING MODEL

Regardless of the CMA platform you choose, determining your platform-operating model prior to launch will often determine the long-term success of a program. According to SiriusDecisions, 85% of B2B marketers using a marketing automation platform feel that they're not using it to its full potential. Formulating a strong CMA platform-operating model prior to launch can go a long way toward optimizing usage and ROI.

Too often, organizations new to CMA are over-confident and believe that they can do everything themselves from the very start. In an effort to speed results and maximize cost savings, they rush to deploy new technology, taking on all of the tactical responsibilities of running, integrating and managing their CMA platform alone. Unfortunately, they typically find themselves so overwhelmed by tactical management responsibilities that their program falters.

To properly determine your platform-operating model, you must identify the support roles and responsibilities on both the supplier and partner side. At initial launch, organizations new to CMA should consider allowing the application provider to take on at least some if not all of the tactical elements of CMA. **LOOK FOR A PROVIDER THAT OFFERS EXECUTIVE OVERSIGHT, OPERATIONAL GUIDANCE AND HANDS-ON SUPPORT FOR THE CMA SOLUTIONS THEY PROVIDE.** As you get more comfortable with CMA and are confident your program is headed in the right direction, you can gradually take on tactical management yourself.

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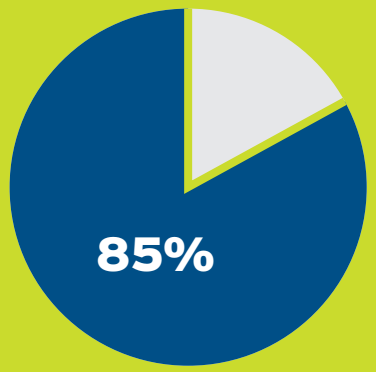

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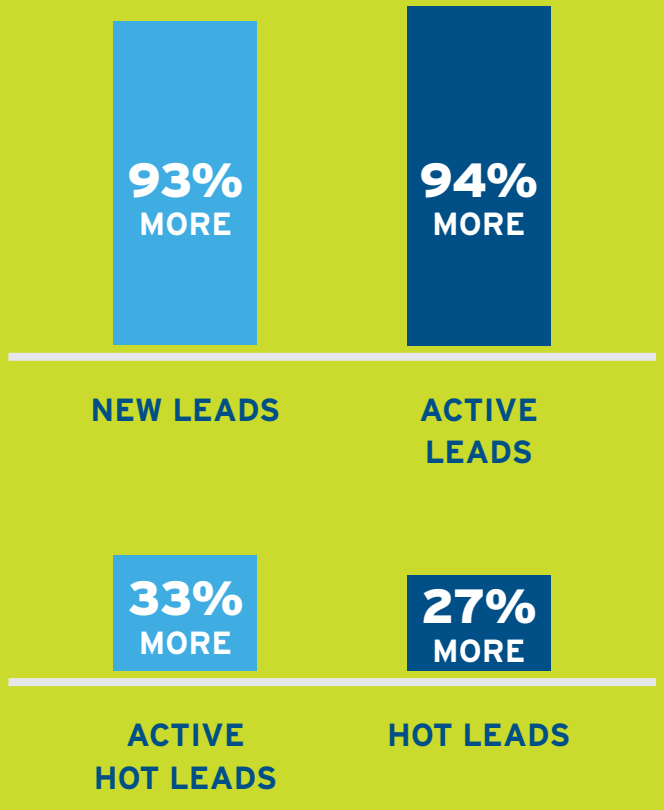
SUPPLIERS SHOULD ALSO SEEK A CMA PLATFORM THAT OFFERS A VARIETY OF SUPPORT OPTIONS TAILORED TO THE BROAD SPECTRUM OF PARTNER NEEDS, INCLUDING:

- **BASIC SUPPORT:** Basic support should come standard with any and all CMA solution deployments. Be sure to deliver introductory-level support and training, so that all partners can get fast answers to their questions and effectively use the tools that you are providing them.
- **PREMIUM SUPPORT:** Offer a premium level of support to partners who wish to execute campaigns and programs themselves, but who may lack marketing resources or require more hands-on direction to thrive. Providing more proactive outreach, strategic direction and hands-on support to partners will optimize their potential and enhance marketing efforts.
- **CONCIERGE OR MANAGED SERVICES:** Keeping partners continually engaged may require more direct or ongoing support from Concierge or Managed Services, which execute campaigns or complete programs on behalf of the partner. Look for vendors that deliver both options, so that you can either provide support per campaign via Concierge Services, or full program operations via Managed Services. Both will help partners define priorities, execute campaigns and achieve more with the technology you're providing. Zift has shown that channel partners with access to Managed Services benefit from 93% more new leads, 94% active leads, 33% more active hot leads and 27% more hot leads.[10]

By delivering services and direct support that aligns with varying channel partner needs, you can maximize your CMA investments and partner adoption.

Zift has shown that channel partners with access to Managed Services benefit from:



CONCLUSION

Your CMA provider should be able to assist you with each of the four (4) cornerstones of CMA success. Start by defining your vision and strategy, then evaluate partner engagement, content development and execution, as well as deliver ongoing support and training to promote forward momentum and ensure the long-term success of your CMA program.

CORNERSTONE 1:
VISION & STRATEGY

CORNERSTONE 2:
PARTNER ENGAGEMENT PLAN

CORNERSTONE 3:
CONTENT DEVELOPMENT & EXECUTION

CORNERSTONE 4:
CMA PLATFORM OPERATING MODEL

ABOUT ZIFT SOLUTIONS

Zift Solutions increases channel sales and boosts marketing impact with a superior technology platform, a complete channel marketing success framework and global customer care. Leading channel driven organizations around the world leverage Zift Solutions' cloud-based platform to automate co-branded marketing, empower collaborative selling and measure results with powerful analytics. To learn more join the conversation via the BLOG CHANNEL CHATTER and follow us on TWITTER @ZIFT.

[1] *Aberdeen Group "State of Marketing Automation 2014: Processes that Produce" (2014).*

[2] *VB Insight "Marketing Automation, how to make the right buying decision" (2015).*

[3] *Pepper Global, Marketing Automation Trends Report 2014, Sep 2013.*

[4] *Zift Solutions: Overcoming the False Promises of Partner Portals [Infographic]. Feb 2015.*

[5-7] *Ibid.*

[8] *Kapost, Content Marketing ROI, Jun 2012.*

[9] *Marketo & Ascend2 "Marketing Automation Strategies for Sustaining Success" (2015).*

[10] *Zift Solutions: How Suppliers Can Maximize Channel Success With Managed Services [Infographic]. Jan 2014.*