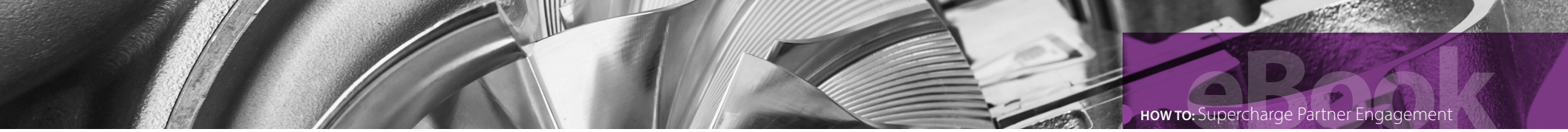
ZiftONE™



eBook

HOW TO: Supercharge Partner Engagement



Engaging Partners in the New World

Channel engagement. It's long been a hot topic in the world of indirect channels because of its undeniable ties to partner retention, loyalty and revenue. But leading experts report that partner engagement is flagging. In fact, SiriusDecisions' research shows that program adoption by partners can be as low as 20%. That's an alarming statistic for such a revenue-critical indicator.

The more important question is why? **Why aren't partners engaged, particularly in a world where the tools for engagement are more intuitive and plentiful than ever?** The answer is multi-faceted and complex, yet it all comes down to vendors successfully engaging partners in the global attention economy.

While technology-enabled tools have improved the reach and pervasiveness of engagement initiatives, they've also made it much easier for competitive vendors to vie for partner attention. And, as we all know, partners have finite time and mind share to give. As a result, they are forced to make decisions about where to direct their attention and when.

To make matters worse, partners have always been difficult to engage. Unlike a direct sales force, whose paycheck depends on it, your partners are much further removed from the direct accountability of mediocre engagement.

When it comes to engagement, a new world order is emerging. The old "spray and pray" methods of yesteryear are no match for the competitive forces of today's attention economy. For vendors, it's sink or swim. The good news is that **automating your channel partner activities can be a powerful life vest**.

PARTNER ENGAGEMENT:

SiriusDecisions' research shows that program adoption by partners can be as low as 20%.



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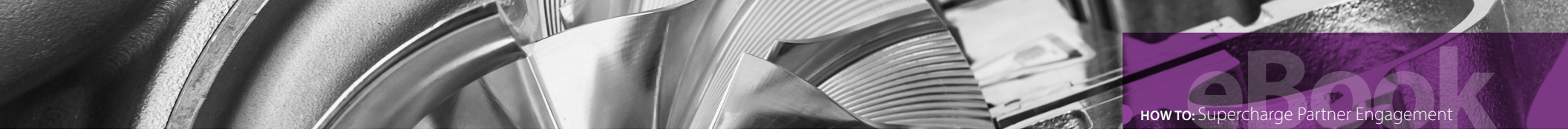


Welcome to the New World Order

Are you Communicating or Engaging?

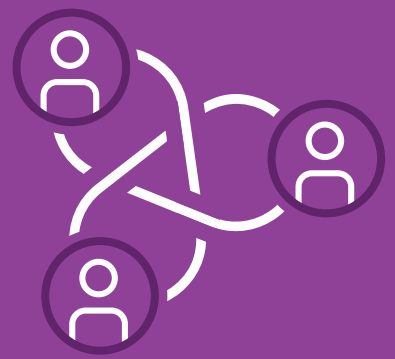
In channel times past, engagement has been synonymous with communication. In fact, channel engagement was often achieved through a combination of emails and phone calls—plus manual spreadsheets to manage ongoing communications.

But engagement has been redefined. In the new world order, engagement is the powerful practice of inducing a desired behavior within your channel community by forming a meaningful and actionable connection with partners.

The harsh reality is that vendors can't continue to push their partners the same monthly email newsletter and expect this will make some kind of connection or induce desired behavioral change. Instead, **vendors need to meet their partners where they are**, even when where they are is away from their desk.

ENGAGEMENT REDEFINED:

The powerful practice of inducing a desired behavior within your channel community by forming a meaningful and actionable connection with partners.



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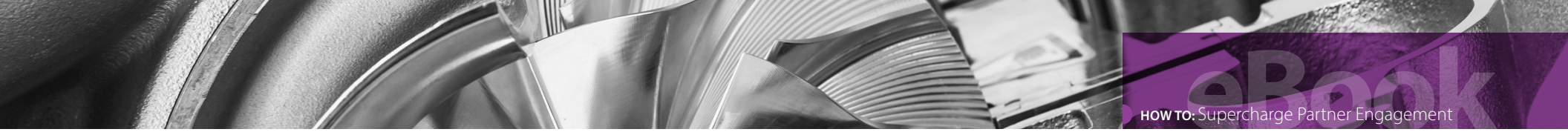

Let's take a look at some of the channel realities that have redefined channel engagement; and the way vendors achieve it.

1. The channel is too large for manual engagement.

The world is flat, and the channel is virtually limitless. Today, vendors are able to enter new geographies and markets more easily than ever before. **The old methods of manual management and outreach are neither suited for nor possible in the large and complex reality of today's global channel.**

2. Your partners aren't paying attention.

"Spray and pray" methods like bulk emails cannot compete in the attention economy. Partner attention is difficult to win and even more difficult to keep. **The indiscriminate engagement initiatives of yesterday will not effectively inspire the desired behaviors within your partner community.**

3. Partner memory is short.

Partners have a lot on their mind, and their memory is increasingly short. As a result, vendors are forced to communicate and engage with partners with greater timeliness than ever before. **When it comes to maintaining top-of-mind priority and inducing the desired channel actions, timeliness is everything.**

4. The channel moves too fast for spreadsheets.

In today's channel, needs and offerings are evolving more quickly than ever. Managing communications through spreadsheets cannot keep up with the speed and immediacy required to serve the needs of the modern channel. **Some level of automation is necessary.**

5. Your best chance of engagement is at the point of need.

The reality remains that your likelihood of engaging partners is highest at key points of action, moments at which a specific partner need is top-of-mind. **By automating the delivery of targeted communications, vendors can catch and capitalize on these key moments.**

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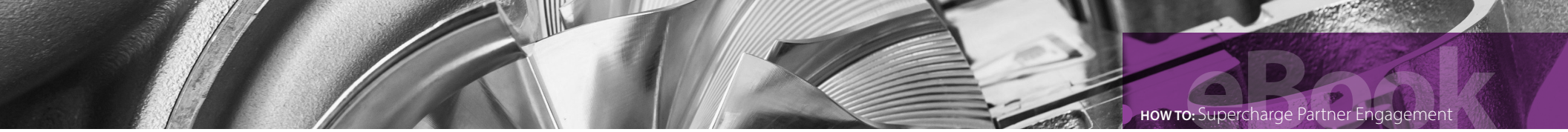

Boosting Partner Engagement

If you have a PRM portal, think for a moment about how your partners are using that portal.

Over the course of a month, are there trends in portal usage?

If you don't have a partner portal, think about the frequency of partner emails and inquiries. Which days are most active?

Generally speaking, there are pronounced spikes in portal activity on the last day of each month and quarter.

These spikes are rooted in an influx of partners who are downloading materials and registering deals at the end of the month or quarter. This alone is not problematic. The problem, however, is that for most channels, **portal engagement in between these spikes is virtually non-existent**.

From our perspective, this is evidence of a fundamental engagement mismatch between vendors and their partners. **Alternatively, automating channel marketing focuses on making engagement a consistent habit of the channel.**

Pronounced portal spikes are rooted in an influx of partners who are downloading materials and registering deals at the end of the month or quarter.

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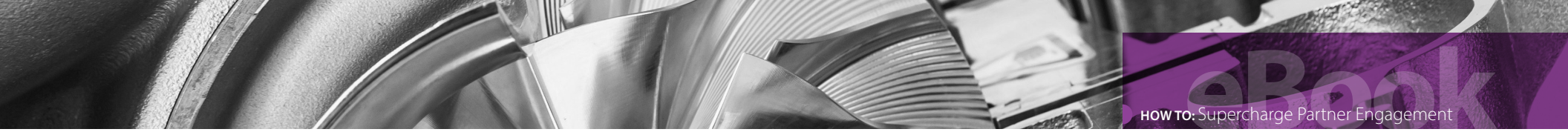

The key question is how?

Let's explore some key elements of partner engagement.

An Integrated, Intuitive Portal

Your partner portal is an essential element in building an engaged channel ecosystem. **Your partner portal should be the central hub in the wheel of all channel interactions.** But the reality is, your system is but one of many. Research indicates that not only are partners committed to more suppliers, they are interfacing with up to 4 systems per supplier. The weight of these interactions is absolutely crushing. Leveraging a single system for all channel communications increases the likelihood that your partners can and will leverage this system.

Quality Over Quantity

If partners feel they are getting too much content, too much canned content or irrelevant content, they will begin ignoring it. **The new world order places the quality and relevance of communications over their quantity.** In order to effectively engage partners, communications must be discriminate, fresh, relevant and highly personalized on the basis of industry, partner status, geography and language.

Mobile Optimized 'Must'

Your partners are increasingly mobile, out and about meeting with customers and building your business. In order to serve partners wherever they are, you'll need to adapt your communications to a mobile context. **Research indicates that partners leverage mobile channel resources for on-demand pricing, support, lead distribution and business intelligence.** Make sure that you are delivering the same content, with the same value, through all devices.

Raise the Bar

Three to four years ago, only a limited number of vendor programs delivered two or more traditional partner engagement initiatives, including incentives, training and certification, MDF and tiering. In recent years, more and more vendors have expanded their offerings to include most or all of these programs. **You'll need to raise the bar for engagement initiatives**, because the historical sources of differentiation are no longer different, and today, engagement is not only the business of the mature channel.

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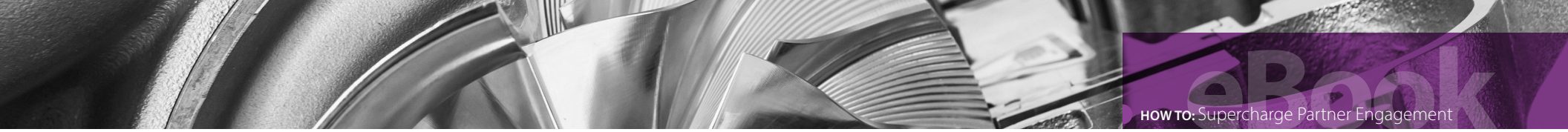

Why Bulk Emails Won't Build Your Business

For a moment, let's consider the most popular tool in the vendor channel professional's engagement tool belt: the bulk email. **While this tool has its purpose, it is not optimal for building engagement.**

The average partner receives hundreds of messages every single day, and ignores the vast majority. As direct-mail marketers know, unsolicited emails get a 2% open rate at best. Unfortunately, channel managers don't do much better with their undifferentiated, mass outreach to partners. In fact, a 3% open rate is typical of outbound channel communications.

The key to breaking out of the pack and getting the most out of your channel lies in automated partner engagement.
A truly engaging communication is one that comes in response to something that partner has done. Consider the following:



"I noticed you've just registered a deal on our new product. Congratulations! Here are the products we've seen the most success in cross selling with that sale. Please find below quote templates and other materials that have helped make the sale in other regions."

How Does Automated Partner Engagement Work?

Imagine if you could assure a 90–100% response rate for all channel communications. **Now THAT is engagement.**

It's no secret that relevance drives responsiveness.
This is the central premise of automated partner engagement. By **matching activities to responses, automated partner engagement dramatically elevates loyalty, responsiveness and revenue** in your indirect channel.

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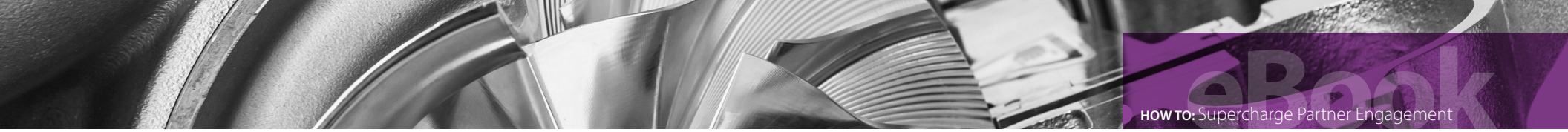

Automated Partner Engagement is Comprised of Two Primary Elements

1. **All of the vendor-facing activities that good channel partners perform in the course of selling, installing and supporting your product or service:**
   - First Vendor Portal Login
   - First Course Registration
   - First Deal Registration of a Second Product Category
   - First Marketing PDF Download
   - Webinar Attendance
2. **All of the forms of incentive, recognition, instruction, co-funding, technical and marketing support that you as the vendor must undertake to prompt these activities and respond to them:**
   - Outbound Account Manager Phone Call
   - Triggered Email Messages
   - Webinar Invite
   - Congratulatory Facebook Post
   - Offer of Product Training PDFs
   - Offer of Specific Training Video

Automation powerfully enables you to fit A to B in a way that maximizes channel revenue and cements loyalty, without under or over-communicating and under or over-staffing.

It **frees your staff from routine, low-return activities** like routing documents, sending invites, registering deals or resetting passwords for partners who could be doing these things for themselves.

Automation also **enables your channel managers to spend more of their time on high-return activities that can't be automated**, like setting target strategy and goals, producing events, designing and conducting webinars, and making joint sales calls—allowing you to maximize returns on your channel partners and your internal channel resources.

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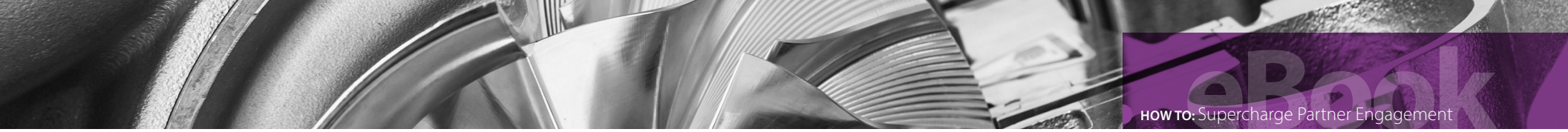

Multiple Engagements Make Experiences

A single channel engagement induces an isolated action, but multiple channel engagements build channel loyalty. As it turns out, partner engagement has a lot in common with customer engagement. **In both practices, multiple positive engagements yield a cumulative positive experience, and a cumulative positive experience drives loyalty.**

Elevating partner experience is the end goal, and it is achieved by coordinating engagement initiatives. But coordinating engagement initiatives is difficult, if not impossible, when you are using disparate systems.

Conversely, an all-seeing channel automation system lets you set the rules and see the results in dashboards while ensuring a seamless partner experience throughout your channel.

Engaging Partners Individually.

Delivering engaging content at the right time is only one part of the equation. Partners want to see content that has been tailored individually to them. **True partner engagement is highly personalized, multi-directional and very similar to human interaction.**

But for channels that have, say, 100,000 partners in their ecosystem, one-to-one relationship building just isn't a possibility. Right?
While one-to-one engagement may sound impossible, especially given the size and diversity of your existing indirect channel, **having a relationship with every single partner professional is not only possible, it is imperative**.

Vendors make a critical mistake when they assume that personalization requires profit-choking manpower. It doesn't need to. With the right strategy, content and cloud-provisioned technology to manage partner relationships, the routine parts of this engagement, such as the noticing of action and the customized responses, can be automated.



In essence, it's about automated mass customization—a practice that has been used to improve relevance and results in the fields of marketing and sales automation for years.

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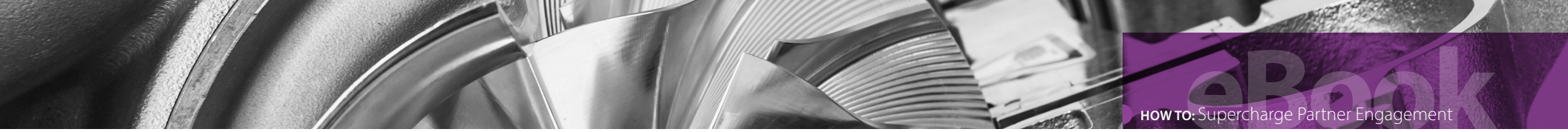

Human Jobs for Humans; Machine Jobs for Machines

Now many naysayers argue that placing an automated machine in the power seat does more to damage engagement than build it. But automation is about empowering and extending human efforts—not replacing them.

Effective one-to-one engagement really comes down to systematically maximizing the relevance of every communication, and synergizing this maximized relevance with a living, breathing human touch. The promise of **automation is its ability to bring together systematic and human-driven engagement**, resulting in a comprehensive approach.

Automation gives channel professionals eyes where they couldn't see, agility where they couldn't react fast enough, and intelligence that powerfully guides their human efforts—but the **channel manager's role is and will always be essential**.

Understanding Engagement: Onboarding vs. Ongoing

What can engagement do for each individual partner? The answer begins with understanding that there are two very distinct segments of engagement. Each has its own needs and requirements.

Universally, partners want to engage when it is necessary and convenient for them, not you. **But necessary and convenient vary based on where a given partner falls in the partner lifecycle.**

ONBOARDING VS. ONGOING:

Onboarding is the channel professional's opportunity to take a prescriptive approach to fortifying and setting a tone for engagement.

Alternatively, after the first 30 days, engagement shifts to something that is much more needs based. *Ongoing* engagement involves providing partners what they need when they need it.

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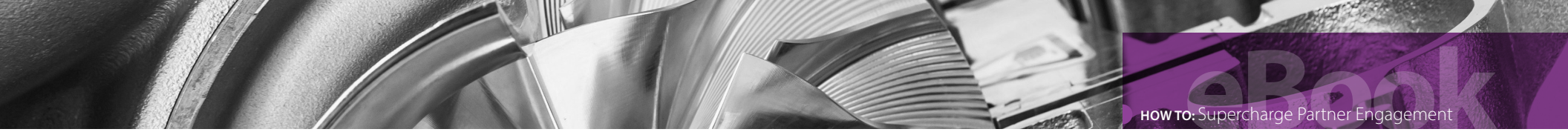

Engaging New Partners: Have Them at Hello

There's no happier moment than the day the partner agreement is signed. But the first 30 days, partners are in flux. **It is during these first 30 days that your rainmaker partners are made, and you are tasked with fortifying a foundation of engagement that will extend through your entire relationship.** But fortifying this foundation demands an automated and proactive approach to channel engagement.

During the first 30 days, partners will do a number of things for the first time that should trigger acknowledgement and encouragement. This is your chance to convert new recruits into highly loyal, high performing partners who are ready to go out and do battle for your business—so don't miss out. You have one chance to make a first impression.

New partners are among the most receptive to engagement outreach. **But take caution. If you aren't careful during this formative period, partners can be relegated to the bad side of the 80/20 rule and become disillusioned.**

During the first 30 days is your chance to convert new recruits into highly loyal, high performing partners who are ready to go out and do battle for your business.

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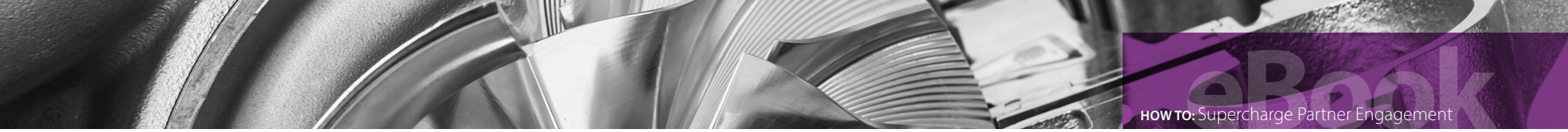

30 Days of Engagement

The first 30 days of engagement should be high-touch, but they need not be burdensome as they can also be highly automated.

The channel manager's job is to create an engagement process that starts at the very beginning of your partner's experience, and leads them through the steps to success. The key is automating the recognition and acknowledgement of partners completing milestone actions, while encouraging engagement and follow-up.

While all activities may not lend themselves to automation, a good partner management system enables you to leverage every possible opportunity to engage, whether through outbound calls, emails, videos, portal notifications, training content or invitations to events. **The diagram to the right provides nine examples of outreach, spread over 30 days of engagement.**

And it's not one-size-fits-all. Indiscriminate emails are impersonal and incapable of moving the needle when it comes to engagement. Personal emails and messages, made possible by automation, are by far the most effective.

30 DAYS OF SAMPLE ENGAGEMENT

1 Partner Registers Welcome Email	2 Approval Notification Getting Started Content	5 Call and ask: "How are you getting on?"
8 Sales Process Overview Video Webinar Invite	14 Partner Training/ Certification Program Explanation	20 Webinar Reminder
21 New Partner Webinar	22 Thank You for Attending	30 Recap of 1st 30 Days Activities and a Preview of the Next 30

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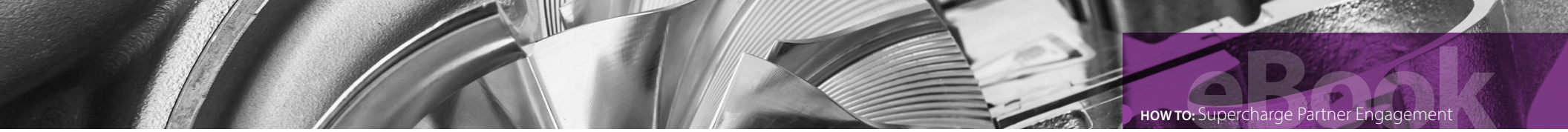

The Possibilities are Endless

Some messages are fully automated, and others require human touch. Some happen at fixed dates and times, and others are triggered by partner activity. **Read through the following examples:**

Hi (first name),

We noticed you downloaded the brochure for project [X]. Did you know there is a product overview video that can be found here <url> for product [X]?

Thanks!

Hi (first name),

I noticed you registered a deal for product group [X] for the first time. Did you know there are related product datasheets and a product overview video that can be found here <url>?

Thanks!

In summation, engaging new partner recruits is about **reinforcing positive partner behaviors**, and **leveraging key points of action** to deepen engagement and **forge lasting bonds**.

ACTIVITY	SUGGESTED RESPONSE
First Login	Portal welcome message; Verify details; Triggered email, activity stream message and push notification offering a welcome video
Second Login	Adjusted portal welcome message with new content or if not seen previously, welcome video; Triggered email, activity stream message and push notification
Viewing Welcome Video	Suggested follow-up content; Triggered email, activity stream message and push notification offering follow-up content
Downloading 1st Content	Triggered email, activity stream message and push notification suggesting relevant follow-up content
Registering 1st Deal	Triggered email, activity stream message and push notification with overview of deal and purchase process and next steps
Registering Subsequent Deal	Triggered email, activity stream message and push notification offering relevant training and portal content for those products
Registering Deal in a Product Category Not Sold Before	Triggered email, activity stream message and push notification offering relevant training and portal content for those products
Taking 1st Training Course	Triggered email, activity stream message and push notification email suggesting relevant follow-up content
Taking Subsequent Training Course	Triggered email, activity stream message and push notification email suggesting relevant follow-up content

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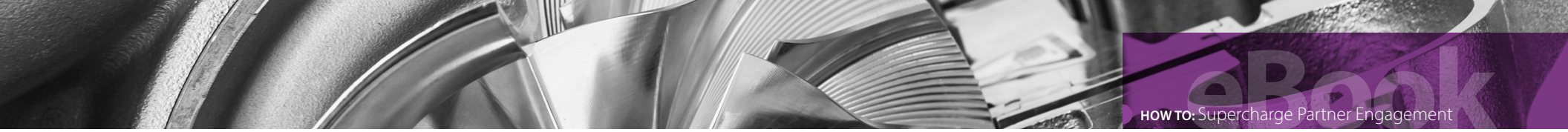

Engaging Existing Partners

They grow up so fast. Soon after the first 30 days of engagement, your partners will become seasoned members of your channel community, comfortable with their role in your partner ecosystem. **But engaging existing partners is a different beast altogether.**

Many of you probably have an entire channel partner program already in place. However, you may be frustrated by the lack of involvement, or simply seeking improved success rates and greater return. **These issues can plague even the most mature of channels.**

Steenburgh and Ahearne's work on motivating sales people applies as much to indirect channel partners as it does to direct sales people. The study found that:*

- B Level performers typically form the **largest channel group**.
- They're often **ignored in favor of A players** or "star performers".
- There is generally **less communication** with this group.
- There is **less consideration** for promotion and recognition within this group.

**Ahearne, Michael; Steenburgh, Thomas. "Motivating Salespeople: What Really Works," Harvard Business Review (July 2012). https://hbr.org/2012/07/motivating-salespeople-what-really-works/ar/4*



Focus on those channel partner professionals who are doing well, but not quite as well as the star performers to see improved success rates and greater return.

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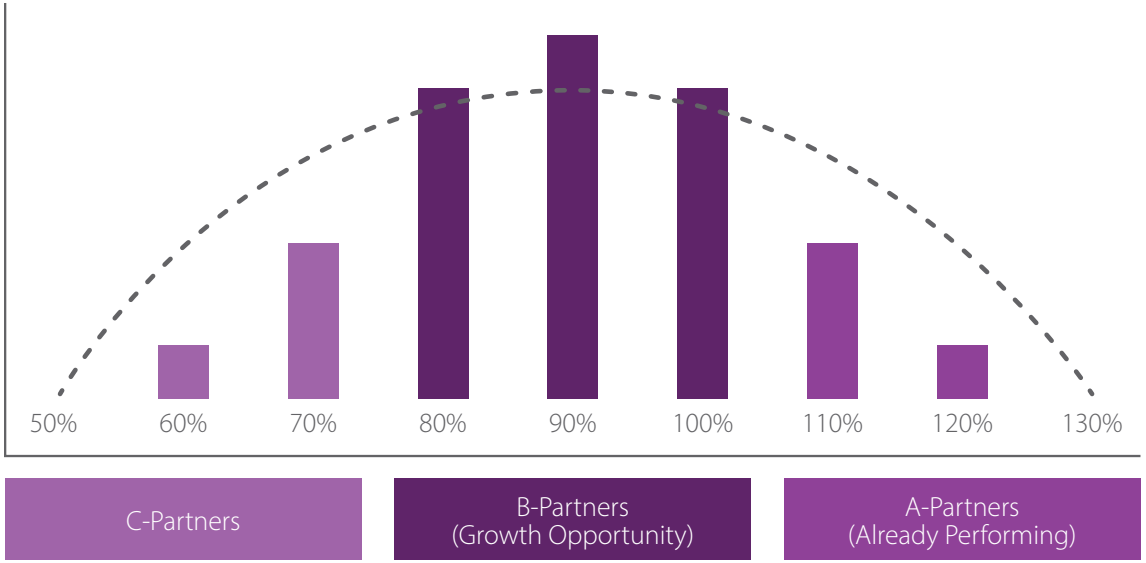
Typical Channel Partner Bell Curve



In order to move the needle, focus on those channel partner professionals who are doing well, but not quite as well as your superstars. These professionals need only a little nudge to be motivated to match your top performers.

Second, create incentives to motivate each category of performer—an incentive for your middle performers, a different incentive for those who are in the top 25%, and a different incentive still for your top 10%.

GROWTH OPPORTUNITY:

The fact is that your B Level performers are most likely to move the revenue needle if given proper attention and incentive.

If you find that your company is in a constant cycle of pruning its low performing partners only to replace them with more of the same, you are just treading water.

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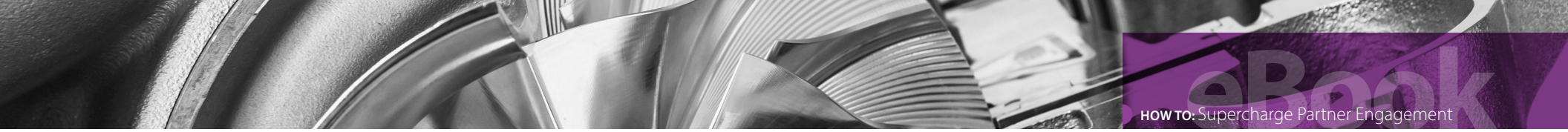

Ongoing Engagement Best Practices

People like doing business with people they know. Make every partner interaction like a visit with an old friend—filled with that feeling of "new things to talk about while maintaining familiarity."

Ongoing engagement can be as humble as a call to listen to your partners and let them know that they are valued. Also, make it easy for them to access channel content and contacts.

- **Make it easy for partners** to access their assigned channel account manager (CAM), including a portal homepage with CAM photos, credentials and contact information.
- Similarly, **empower partners** to access the information and tools they need on-demand through a Web-accessed partner portal.
- Remember more **traditional outreach initiatives**, such as calling partners and engaging with them voice-to-voice.
- Send **automated activity-triggered messages** at key junctures in the partner lifecycle. Examples include the promotion of continuing education or cross-selling opportunities.
- Leverage the **power of video** on your portal, whether on-demand or via live webinars.
- Existing partners will tire of hearing the same messages again and again. In order to maintain engagement, **content will need to remain fresh and relevant**.
- Engagement is bi-directional, both between partner and vendor, and partner and partner. **Employ techniques for partners to engage with you**, as well as with one another to share knowledge and experiences.

Finally, listen to your partners!

While anyone can recommend best practices, only your partners can tell you what they need to succeed, what works for them and what they would like to see changed, added or improved. **Engagement is a two-way dialogue, so make sure to listen.**

Once you have an engagement routine down for every phase of the partner lifecycle, automation makes it easy to continue creating conversations that are relevant, engaging and motivational years after your partners have first signed on.

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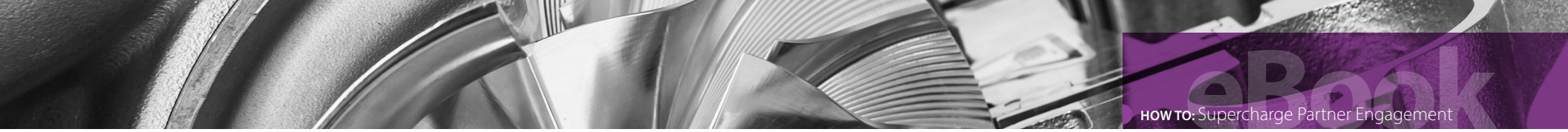

Engagement: A Worthwhile Pursuit

Partner engagement is critical in the first 90 days, but the real test of your mutual success takes place in the long term. **Continued engagement is an uphill battle, but it is certainly a worthwhile pursuit.** It is in the context of ongoing engagement that your investment in an integrated partner management system really pays off.

On average, customers who leverage partner automation with a multi-touch partner engagement process see the following:

Partners are
10x MORE ENGAGED
in the partner program.

Partners generate
2x THE REVENUE
compared with partners who did not go through the process.

Compressing the Time-to-Action

And that's not all. Done right, automation can **shrink the delay between "I will take care of it" and "Done."**

Does a particular partner professional need to take additional training? At just the right time, send an "enroll" button to enable the partner. Does one of your partners need to show examples of co-marketing collateral in order to claim MDF funds? Immediately send that partner a link to upload on the same page with the claim.

It's just-in-time partner engagement—**perfectly optimized to generate the targeted actions within your indirect channel**.

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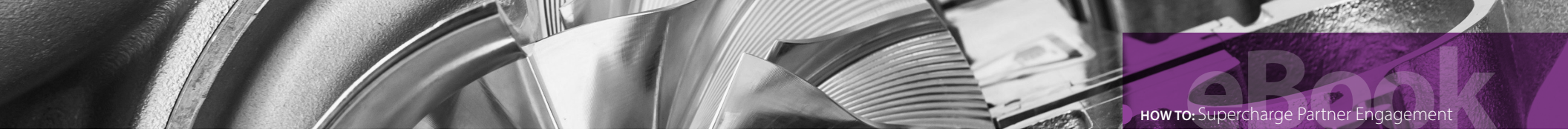

A Focus on Action is Central to Partner Automation

In fact, adding an **activity stream** on your partner profile is yet another way to keep your partner professionals in the groove and focused on driving positive action for your business.

As a cross between a social media feed and an activity log, the activity stream shows your partner professionals what they have done recently and what needs to be done in the future.

ACTIVITY STREAM

All | Following | Flagged | Actions | Messages

Automated Message Received — 6 days ago

Registration Successful
You have successfully registered for the certification, Support Certification.

Flag Like

Automated Message Received — 8 days ago

Certification Passed
Congratulations! You have successfully passed the Technical Certification, certification.

Flag Like

ACTIVITY STREAM

All | Following | Flagged | Actions | Messages

Automated Message Received — 5 days ago

Quiz Passed
Congratulations! You have successfully passed Skywalker Problem Diagnosis.

Flag Like

Automated Message Received — 6 days ago

Quiz Failed
Unfortunately you have not passed your recent attempt at Skywalker Problem Diagnosis.

Flag Like

ACTIVITY STREAM

All | Following | Flagged | Actions | Messages

Automated Message Received — 20 days ago

Support Case Submitted
Thanks for submitting a support case, ID41. To edit the case, click my title.

Flag Like

Automated Message Received — 22 days ago

Support Case Submitted
Thanks for submitting a support case, ID40, for review. To edit the case, click my title.

Flag Like

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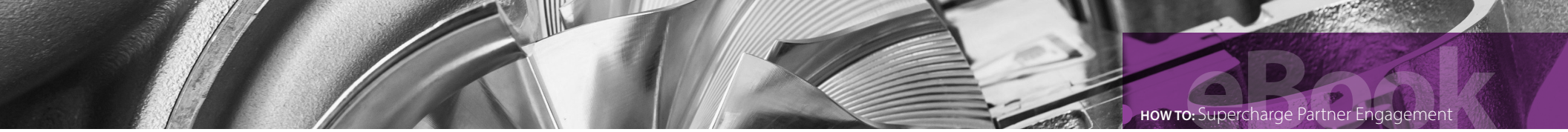

You Can't Manage What You Can't Measure

Many erroneously believe that engagement is unmeasurable, and therefore unmanageable. Any seasoned channel professional knows that engagement **can be difficult to measure, but it is possible to measure**—particularly with the right tools.

By adding powerful channel analytics to channel engagement initiatives to glean meaningful insights about how to increase partner performance, measure aggregate engagement and quantify the individual progress of each partner within your channel.

Let's start by establishing that engagement is a forward indicator of revenue. Partners who are more engaged are more likely to be loyal, and loyal partners are more likely to be active partners.

Active partners are more likely to drive revenue. Keep this in mind as we progress through this section, which will express how you can enhance engagement efforts within your channel through measurement.

ENGAGEMENT IS A FORWARD INDICATOR OF REVENUE:

Partners who are more engaged are more likely to be loyal, and loyal partners are more likely to be active partners. Active partners are more likely to drive revenue.



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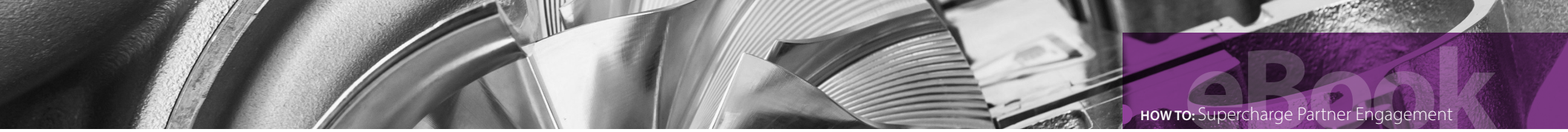

Charted Waters and the New Best Practice

The first use of measurement in the context of channel engagement can help answer the question, "How do I get more partners performing like my best ones?"

High performers tend to share common characteristics.

Automation's job is to help discern those characteristics, then apply them to groom more partners into high performers.

Applied to channel engagement, measurement empowers you to accumulate and compare partner history amongst top performers, **identify precisely what engages and motivates your best partners**, then extend these findings throughout the remainder of your channel.

- Are your top performers also the ones who always attend your **in-person events**?
- Do partners who have **attended webinars** sell more of the related product offerings?
- Are your engaged partners **cross-selling more** than your other partners?

The power of automation is its ability to identify meaningful patterns, and then create easy and actionable paths for your next best performers to replicate. **Engagement doesn't have to be a guessing game.**



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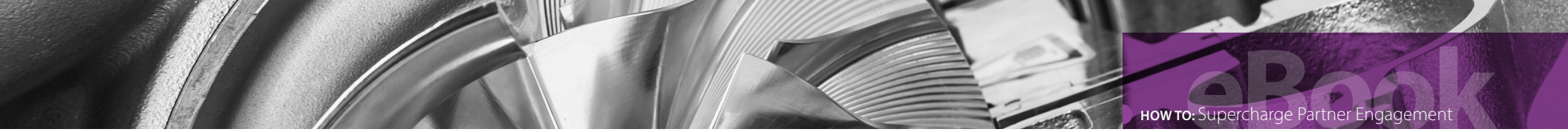

Quantifying Engagement: Not an Oxymoron

The second use of measurement when it comes to channel engagement can help answer the question, "How should engagement be measured?" This application of analytics focuses centrally on quantifying engagement outcomes and ROI.

We'll introduce **some key performance indicators**, but first, we'll have to note that measuring engagement should involve an examination across all stages of the partner lifecycle—not just the first 30 days.

The tendency of channel operations is to focus largely on onboarding. However, beginning with onboarding, on through enablement, motivation and growth, each stage of the partner lifecycle has a role or function loosely tied to it.

Partner automation takes a distinct lifecycle approach to channel management, tracking standard and advanced KPIs throughout the partner lifecycle.

Ultimately, the goal is to see more registered deals. When it comes to measuring engagement, however, you'll need to **focus on the correlation of sales and marketing**, and the waterfall metrics frequently seen in marketing automation.

Let's take a look at a few.

1. Marketing Qualified Leads

Marketing Qualified Leads (MQLs) are prospects that have shown your company interest by downloading a content piece, attending a webinar or taking some other marketing-driven action.

2. Sales Accepted Leads

A Sales Accepted Lead (SAL) is an MQL that has been reviewed and handed off to sales to advance the sales process.

3. Sales Qualified Leads

A Sales Qualified Lead (SQL) is a Sales Accepted Lead that has been pre-qualified and matches your minimum sales qualification criteria.

4. Qualified Sales Opportunities

Qualified Sales Opportunities (QSOs) have undergone more rigorous qualification, and have been deemed a compelling sales opportunity for your business.

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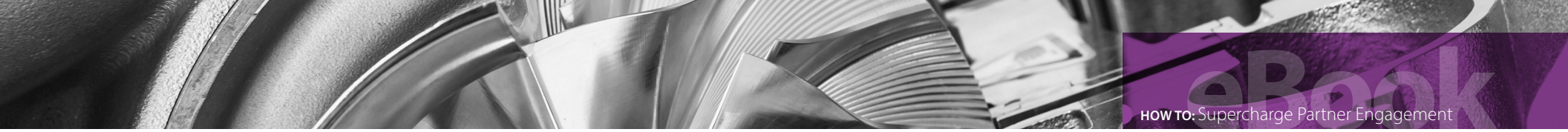

Channel Listening through the Partner Portal

Through automation, you are able to get a true and quantified understanding of partner needs at every stage of the lifecycle. The third application of measurement **empowers you to listen to your channel by measuring vendor-facing behaviors**, including portal usage, mobile app usage, LMS/training modules, deal registrations, incentives, co-branding and MDF modules.

How are partners using the portal? What content do they appear to be consulting in a single visit? What is the action you are trying to drive?

With a hearty understanding of portal activities and therefore, partner needs, the channel manager can **more effectively trigger automated responses** that serve up content to fill needs, deepen engagement and drive targeted behaviors.

E is for Engagement and Easy.

When it comes to engagement, the world is different, but the central premise remains the same: **successful, enduring engagement boils down to being easy to do business with**.

Think of the moments of truth along the partner journey.
While partners are living and demonstrating key behaviors, it is the role of the channel to be responsive in real time. In turn, **vendor responsiveness will be met with reciprocal partner responsiveness**.



Listen to your channel by measuring vendor-facing behaviors to more effectively trigger automated responses that serve up content to fill needs, deepen engagement and drive targeted behaviors.

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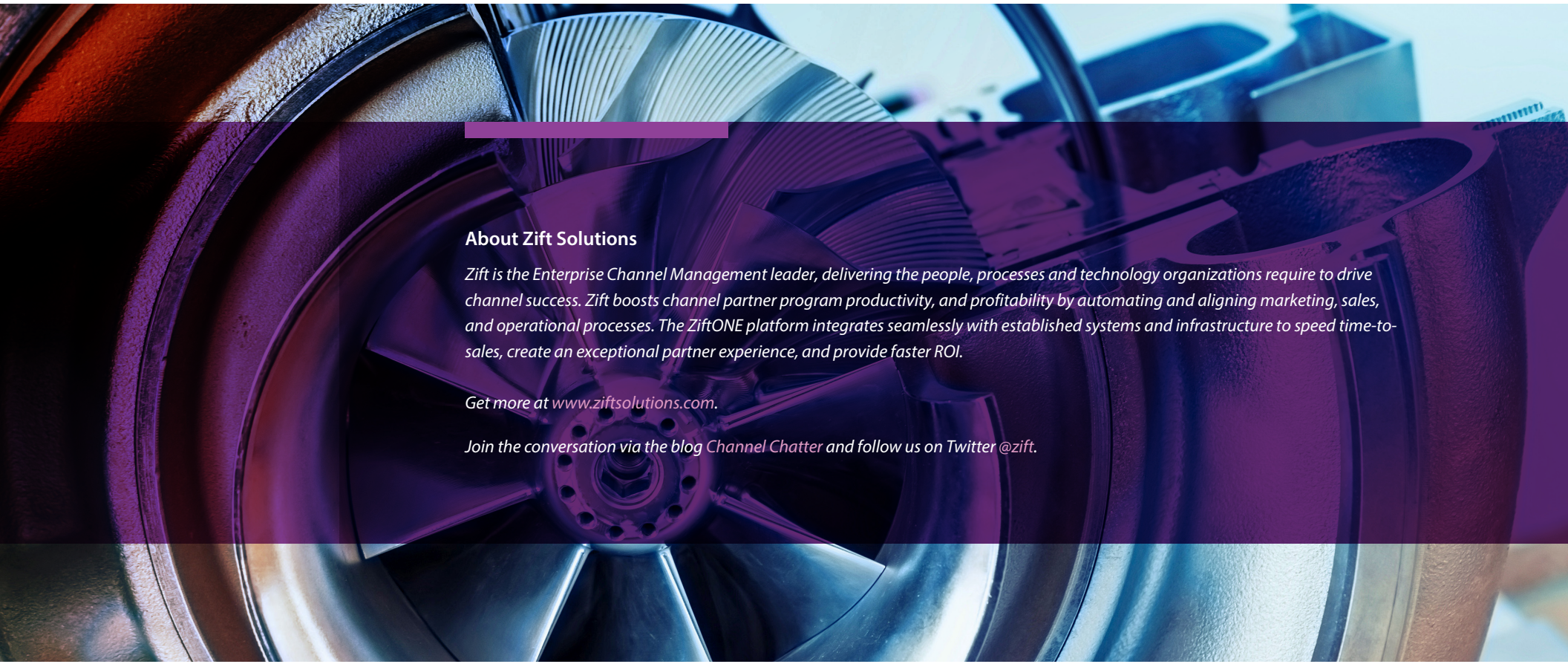

About Zift Solutions

Zift is the Enterprise Channel Management leader, delivering the people, processes and technology organizations require to drive channel success. Zift boosts channel partner program productivity, and profitability by automating and aligning marketing, sales, and operational processes. The ZiftONE platform integrates seamlessly with established systems and infrastructure to speed time-to-sales, create an exceptional partner experience, and provide faster ROI.

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