



Self-Guided Tours in Partnerland

Prescriptive, Tailored, Automated Journeys Are
Taking Partner Enablement to a New Level

By Jon Lavietes



We humans can be a fickle bunch, at least when we put on our customer hats. Whether in a B2B or consumer context, we've come to expect an easy, intuitive, user-friendly, and efficient experience when both shopping for and using a product or service. If we're forced to figure out complex details or sift through mountains of information, chances are we will move on to a competing option that doesn't require such labor. If time is indeed money, then the minutes it takes to get the full value of a purchase are as precious as the dollars we spent on it.

It turns out that partners today aren't so different from us, particularly in tech. Partner enablement, the process of getting stakeholders from various parts of your partner's organization up to speed on your solutions, is as old as the industry

itself. Companies have been tinkering with ways to get partner technical, sales, and marketing personnel intimately familiar with the offerings they will jointly sell and implement since the dawn of time—or at least the mainframe. But today this enablement is as detailed as it has ever been and evolving to be more partner-friendly than ever.

Hey Partner, Don't Stop Believin': It's All About the Journey

The buzzword of the day in partner enablement is "journey."

"We're shifting dramatically to creating an experience for the partner that is very natural—very focused on 'journey-based,' leading the horse to pasture, so to speak, in a way that is very much not only part of their sales motion or whatever their motion might be, but something that makes it just so brain-dead simple," said **Mark Rogers**, senior vice president of channels and strategic alliances at partner relationship management (PRM) software provider Impartner. "It's the idea of

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treating a partner like your own employee, or more importantly as a customer. You would never leave gaps or make it difficult for a customer to become self-sufficient or to get what they need when they need it.”

These journeys are prescriptive and oftentimes automated. From the first instance of a prospective partner poking around at your site to the ongoing maintenance of a successful collaboration, partners are prompted at every step with detailed instructions and information on how to sign up, onboard, initially train, and continually educate personnel, as well as how to sell and market products.

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In one Impartner workflow, a partner registers in a non-credentialed portal, and an autoresponder generates a thank-you and welcome notice promising more information the next business day. After the vendor’s channel or partner manager confirms that this prospective partner is a potential fit, the new partner’s information is integrated into relevant enterprise apps, such as Salesforce or SAP. A welcome link then prompts the partner to upload branding requirements and other marketing collateral into the portal so that the vendor has what it needs to market that partner.

The new ally is shepherd to the customer success portal and directed toward a series of sequenced training videos and

documents that are tailored to the types of solutions and services it plans to jointly develop or sell with the vendor. When they have completed the requisite certification and training exercises, the business planning process is initiated. A meeting with the respective sales teams is scheduled where the parties agree on key performance indicators (KPIs) and immediate objectives over a 60- or 90-day span, or another interval of the group’s choosing. The journey offers other options, such as press release assembly, and at various intervals along the way, partners earn badges, tchotchkes, and other incentives to continue down the path. Collect more badges and the vendor grants certain privileges like more visible placement or better search results on the partner portal. The partner moves through the process with not much more than several mouse clicks.

“The partner just keeps going. Keep clicking, man!” said Rogers.

Throwing Out the Manual

Partner enablement is also part of end-to-end alliance management life cycle software vendor allianceboard’s offering. **Louis Rinfret**, the company’s founder and CEO, outlined a similar case study of a client seeking to build a large ecosystem, in which prospective partners browsing the vendor’s site can virtually be taken by the hand on a path that includes application, verification, training, testing, certification, and eventually joint sales and marketing activities, such as product roadmap creation and joint sales and marketing planning. If there are questions at any time in this self-guided journey, the partner can communicate through a platform and receive answers to questions from the appropriate vendor executive.

“This was done purely manually before. At each stage, there’s a form that was filled, and an email comes to a person. After that it’s entered into a legacy system, and then it gets



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approved and the onboarding and activation gets done. Everything was tracked relatively manually,” Rinfret recalled. “The idea now is to digitize that and bring more discipline, efficiency, and transparency in the process, so that there is global visibility in the organization around what’s coming in the pipeline.”

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The old way required a lot of legwork on the partner’s end. There was a time when vendors patted themselves on the back for putting training courses, technical manuals, case studies, marketing and sales messaging, and other critical background documents online in self-service portals. The problem was that they left it to the customer to figure out which of the dozens of classes and thousands of documents applied to them.

“Maybe some people enjoy going through a 400-page manual online. Most people [couldn’t] care less, and they won’t do it,” said Rogers.

“Usually there is just so much on a portal, they don’t know what to do with all of that information, or understand what’s important right now. A guided journey sheds all of that,” said **Norma Watenpaugh**, CSAP, CEO of Phoenix Consulting Group and ASAP advisory board member.

Well-Suited: Custom-Tailored Journey Fits Your Partner’s Needs

These days it’s up to the company to match allies with programs and information that are tailored to their needs and desired outcomes.

“The sophistication of partner enablement programs has increased over time,” said **David Erlenborn**, managing director of alliance strategy at KPMG. “There’s no one-size-fits-all. Our alliance partners are increasingly customizing the enablement programs and benefits they offer to achieve more specific results than just ‘Let’s get people enabled.’”

This increased sophistication comes in many forms, including proactive “nudges” when a partner has stalled in the process. For example, an alert can inform a partner that they are several certifications short of maintaining their current partner status when they are 45 days out from their deadline.

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Customization efforts are arguably most apparent in the new training options.

“If someone wants to earn a certification in, say, machine learning, generally you have your LMS (Learning Management System) and your instructional design set up so that you know what that curriculum is, what that path is,” said Watenpaugh. “Someone can say, ‘Okay, I want to get certified in this.’ They get prompted along that path. It’s all by clicking a box online, which is sort of incredible. It’s that easy.”

In fact, this move toward increased specialization has played a role in prompting many vendors to move away from traditional gold-silver-bronze tiering systems, which have been devalued over time by the massive number of players that have achieved gold status.

“What customers really want from gold partner status is, ‘Oh, they’ve got a deeper discount, so I can get a deeper discount.’ Vendors are trying to move away from that into more of a value-based program. So if a customer is doing sophisticated AI in the financial markets, you want to match them up with a partner that has that expertise in that industry,” said Watenpaugh. “What becomes more valuable in the marketplace are these specialty certifications, these specialty recognitions.

“It’s not just ‘I know the technology.’ It’s ‘I know your business,’” she added.

From Foregone Conclusion to a New Chapter in Enablement: The Marketing Story

“We’re seeing an increasing shift to industry segmentation,” said Erlenborn. “When we engage with our alliances, our preference is to engage at the industry level, so we can work with somebody within our partner’s organization who understands the unique issues for that industry and how we can target that industry with joint solutions.”

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It isn't just technical- and industry-specific enablement that is getting more specialized. Enablement programs are targeting different horizontal functions in a focused manner, too.

For many years, technical and sales enablement have been core parts of enablement programs—"a foregone conclusion," as Watenpaugh characterized it. Marketing enablement wasn't always as fundamental. That has changed drastically in recent years.

"Marketing has become more important because of the buyer's journey. The buyer's journey is now mostly online, with no sales rep involved until very late in the sales process, and a lot of opinions have been formed before there is any engagement with the partner," said Watenpaugh. "Seventy percent of the sale is done by the time a customer contacts a sales rep."

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Partners now have access to prepackaged email, social media, and content marketing campaigns, replete with appropriate logos and messaging. The engagement workflows are equally advanced as the new technical and sales programs. Watenpaugh described an end-to-end package she worked on on behalf of a Global 100 company that starts with a social media campaign to generate leads at the front end of the funnel. The results of this activity are illuminated by analytics, which helps the vendor prioritize prospects and move to more targeted and multifaceted nurturing campaigns. Marketing leads are scored throughout these multitouch campaigns, and the higher point-getters are automatically referred to a tele-marketing agency for further qualification. Once sales has qualified them, prospects finally get connected to a partner rep, who initiates the actual sales campaign and cues up a requirements workshop.

Impartner acquired the through-channel marketing automation software business of TIE Kinetix last year to add similar capabilities to its broader solution set. Rogers said the company's customers are finding that enabling partners to drive their own leads has helped all parties "scale like no one's business."

Innovations—and Certifications—Come Fast and Furious

As the tech industry transitions to cloud technology, service enablement has become an essential competency. Since as-a-service solutions are subscription-based, the customer relationship continues well after the sale. A lot of recurring revenue is at stake if there are hiccups with the administration and ongoing maintenance of cloud services. Whether you classify service enablement as a subcategory of technical enablement or consider it a separate class, it is a different animal.

"Now, software vendors don't get paid up front. They have to rely on happy customers renewing their software. That means the partner has to be better at deploying the software, and then stay in contact with the customer over time and maintain that relationship. The dynamics based on how software is now sold and consumed naturally means that software companies have to care more about and invest more in enablement," said **Bill Thomas**, CA-AM, vice president of global strategic alliances at Adaptigent.

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New releases of cloud solutions come every few months, which puts the onus on vendors to help partners stay on top of new functionality that could be of use to joint customers.

"Innovation comes fast and furious. It's one thing to get a partner onboarded, but it's another to keep them truly proficient at your software as it evolves over time. You have to invest more in training. You have to invest more in tools and channels with which to reach the channel—internet-enabled content delivery and training delivery that can be done quickly and remotely," said Thomas.

He added that he has observed that salespeople involved in strategic alliance and reseller relationships have placed a higher priority on obtaining service delivery certifications in recent years.

"You have a whole new audience and a whole new certification path for a group that in the past needed awareness and understanding but not necessarily the in-depth ability to do a great job selling your software," said Thomas. "Customers

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care about that, because that gives them a higher level of confidence that you as a service provider understand the customer software, and it's reflected in the sales process. There's more differentiation in your partner program, but customers also on some level feel that a partner that comes to the table with a higher knowledge in the sales process probably also has a higher knowledge in the delivery process. The certification process is absolutely required for resell, but it is desired now more than it ever has been for the co-sell model."

Nothing Personal? Human Touch Still Required

All of this automation and self-service doesn't mean that the personal touch is lost. On the contrary, tech companies have always allocated market development funds (MDF) to their most strategic partners that drive more innovation and revenue. Erlernborn has seen large cloud providers offer hands-on, real-life training in the field around different types of implementations and selling motions, initiatives that he says help offset early client engagement costs. Like the self-guided virtual journeys, these partner enablement initiatives are tailored to the specific needs of the partner and the collaboration as a whole.

"It is prescriptive in that it's not just 'Here's some funds to support what you are doing.' It's 'Here are very specific programs for specific outcomes,'" said Erlernborn.

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Even though many of these campaigns are automated and intended for self-service, some partners still bring in other parties to help implement them. Rogers said Impartner has

partners on hand to help build out functionality, highlight appropriate capabilities the customer might not have discovered on its own, and optimize the investment in the Impartner solution as a whole.

The Holy Grail: Fewer Resources, Greater Success

Nevertheless, when done right, self-guided journeys help you reach that Holy Grail of getting the best possible outcomes from partners while investing fewer resources to do so. It's often the answer to the question, "How do I standardize this and how do I make it as low-touch as possible for my organization so that I can deal with as many partners as possible at the lowest possible cost, while enabling them to be efficient?" said Rinfrét.

And partner reps are freed up to concentrate on exceptions and higher-value activities.

"If you don't have any level of automation in place, then you are spending a lot more time and administrative [resources] than you are on strategy," said Thomas. "[With automation] you can spend more time on the ideation process with your partners—thinking about new markets to attack, new solutions to create. Winners do a better job leading innovation around solutions and market strategy and how to go to market with partners.

"That's the Holy Grail for all of us," he added.

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“There is a trend to automate the joint sales and marketing, but in parallel to this, it’s important to have that strategic perspective,” said Rinfret.

And while the industry has been deemphasizing in-person training and certification for quite some time, the pandemic combined with the success of partner journeys may have accelerated this trend.

“If we do it right with social media campaigns, webinars, and targeting the right personas with the right messages, we could approximate the results we would get in the old world where there was a lot of face-to-face interaction,” said Thomas. “The ROI on some of these more targeted methods that we have for engaging customers in the marketplace seems so much better. Why would you abandon them 100 percent? You probably say, ‘In the future I’m going to do both.’ I’m going to do a lot more of the virtual stuff than I did pre-pandemic for now.”

Focus and Click: Prompts, Attaboys, and Collaborative Opportunity

Of course, as easy as these partner journeys are for end users, a tremendous amount of labor and painstaking detail goes into developing them.

“There’s a lot of work that goes behind the scenes to it. Designing the curriculum is the easy part, then you have to figure out what is the series of communications and triggers and prompts and attaboys. And at what point do you send someone a tchotchke for their efforts? Or, at what point do you want to schedule a conversation with a human advisor?” said Watenpugh.

One of the greatest challenges is finding that right balance of creating a focused journey without limiting the collaboration’s possibilities. After all, partners may not look at the resources on your portal beyond what you prescribe, so you have to be sure you have given them every tool that can help turn over every stone and look under every rock. Rogers recommended that vendors and their partners reevaluate journeys every so often.

“Do [your communications processes] liberate free thinking, so to speak, and allow the partner and us to creatively assess new opportunities, not stick to the same old thing over and over again? Flexibility is always a critical component, especially when you’re automating a journey. Journeys are always open-ended.”

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And as much as you want to free up your partner managers to focus on value-creating activities by creating repeatable and scalable processes, you still need to have humans available to roll up their sleeves when partners encounter obstacles.

“You don’t want to be too rigid and say, ‘Just talk to the chatbox,’” said Rinfret.

Very Much Alive: Journeys Result in Greater ROI

Some platform vendors have measured the effectiveness of partner journeys in hard numbers. Watenpugh relayed a story of one that compared the results of partners that participated in a journey with others that were onboarded the traditional way.

“The partners that got put into that journey were driving 50 percent more revenue in the first year. TLC works,” she said. “That first 90 days of the partner’s experience with you can determine their lifetime value.”

“[Partners] who can step in and represent us well take care of the customers. The next thing you know those customers are not only renewing, they’re upselling and getting more.”

More than just hard numbers, more efficient and effective enablement instills in partners that “do-or-die mentality” of taking care of joint clients “like it’s the last thing on Earth,” said Rogers. “Those who can step in and represent us well take care of the customers. The next thing you know those customers are not only renewing, they’re upselling and getting more.”

A good journey determines whether partners faithfully receive your value proposition with open arms or go their separate ways. ■

