SOCIA LLY INEPT

BY JACQUI RAND
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Time to spice up your channel communications with a blended program of social interaction to make channel partnerships more engaging and profitable.

Acknowledgements.

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CHAPTER ONE - WHY BE SOCIAL

Tracking Social

After years of working in the ICT channel, I want to test the behaviour of channel partners to social interactions. I want to take a measured look at their reactions and attitudes to the social communications of the vendors (or distributors) to see what actions the vendor can take that will have a direct and positive effect on channel performance. We all know that increased margins, financial incentives and operational efficiency can drive positive change with your channel partners, but what about the other, softer aspects such as social conversations and exchanges?

What are these, how can you “scale” them and how can they be tracked?

Tracking requires a scientific approach and my aim is to provide just that. Science being the process of analysing predictions that, through systematic testing, can become knowledge. So, if a reaction to an action can be tracked and explained it can be built into a catalogue of truths.

There are, of course, the exceptions that prove the rule and human behaviour, although predictable, is not guaranteed to be repeatable time and again – but the majority of instances will form the basis of a strong reason to follow a systematic approach towards developing a template for social rules of engagement within your channel.

The phrase “Rules of Engagement” from a channel perspective, often applies to the resolution of channel conflict. But here I encompass all the ways in which you engage or “socialise” with your channel.

The basic premise is that, if you can observe it, it is tangible, and so you can measure it. Therefore, what social levers can you use to drive the desired behaviour in your channel and how do you build that into the everyday channel process? Social levers cover a wide range of activities which will be detailed later, but in essence they are both online and offline exchanges that prompt a response – everything from a text message, a phone call or notification, through to a request for information, a survey or seeking
opinions and feedback.

Doing these things is not hard, they are already part of our daily lives and, with the addition of some technology tools, this can be scaled across all your channel partners. These activities are already having an effect, but the hard part is measuring the effectiveness.

The objective is to show you how to build your own list of “the social things I can do that will have a positive effect on my channel”, and that will complement the more traditional levers, such as partner programs, incentives and efficient processes. To demonstrate that adding “social” to the everyday process of managing a channel will build a more successful channel. For this, I will walk you through the scientific approach to social interactions to yield results. My objective is that anyone with channel targets will see that it makes absolute sense that they add a social dimension to their daily activities to drive better performance.

When defining social in this context it is all about “relationship-building” not really the one-to-many mass-push of public social sites (like twitter, LinkedIn, etc.), which are more about awareness and for which there are social measuring tools to track likes, comments, page views, clicks, etc. These marketing tools play an important part, particularly in lead generation and to increase awareness. But I am looking at the one-to-one or one-to-few engagements, when you know each other or have made a positive “connection”. These relationships can and should be supported by technology and they can happen online on public social sites (through direct messaging and direct engagements), or through private community sites or offline in more traditional formats.

They are direct, personal, targeted, individual and constitute a recognition of one another and build a relationship between, not just the individuals, but the businesses; so, between a vendor (or distributor) and their channel partners.

If you have a trading partner who has an account manager assigned, they are most likely to be successful – it’s that level of 1:1 contact that enables interaction; questions and answers, relationship building, trust and
understanding. However, as you grow and extend your channel strategy it is unlikely you will be able to assign an account manager to each and every partner and this is where the disassociation begins; relationships break down, partnerships wither and die.

**To truly scale your channel and build partnerships with all possible trading partners, you need to find new social ways to interact, using technology to minimise the workload, but keeping it personal. This is the challenge we are meeting head on.**

**Clear Definitions**

Note that we are not looking to measure what many companies term “Social on demand” which enables channel partners to use vendor content, posted on a portal, to push to potential customers. In this instance it is termed “through-partner marketing” in so far as the content belongs to the vendor and is intended to be seen by customers and potential customers and the scale of impact is amplified by going through channel partners. These are B2C (business to consumer) tools, whereas this study is focused on the B2B (business to business) interaction of vendor and channel partners and so focuses on social levers to and with partners, not through-partner to customer.

And although my experience and background centres around the ICT industry, the theory is not restricted to the technology industry as some 75% of global trade flows through a channel and so this study could assist any number of other industries where building trading partners, dealers or downstream resellers involves building relationships with other companies.

The approach I take to measure this B2B interaction is to be as systematic, objective and as scientific as possible with a little bit of art and subjectivity thrown in for good measure. I aim to provide you with a template that can be applied to your specific industry and partner ecosystem; understanding that there is no one-size-fits-all, but an approach or guideline you can follow.

On the “Science” side, you need to define four things.
• First, define your specific channel challenges and prioritise them. This will lead you to identify which type of partners or trading businesses are your priority for improvement.

• Secondly, outline the desired behaviours of those partners – what do you want to achieve? These behaviours will be dependent on who you have identified as your priority partners and vary according to the relationship you have with them now. These will generally fall into three distinct categories; partner recruitment, active partners or latent and inactive partners.

• Thirdly, identify the influencing factors such as partner programs, competition, pricing and all the physical and subliminal occurrences that contribute to their existing or historical behaviour.

• Fourth and finally, you need to build a list of the levers which can be applied, or changes that can be made, to influence or change those behaviours.

Sounds a lot, but it’s just a systematic way of doing things.

There are four main elements to this flow, but each practical example will be different as each company’s circumstance is different. I will be creating suggestions and a long-list from which you can cherry-pick what you need and what is appropriate.

In contrast, on the “Art” side there will be human contradictions, errors, nuances and darn right bloody mindedness not to conform to a scientific process. Understanding that “Art” will be the exceptions that proves the rule.
In the beginning

I cut my channel teeth in the software industry back in the 1980’s when there was no internet, no mobile phones (I got my first Car Phone in 1988 which was beyond exciting) and even the term “VAR” was new and not understood. PC’s had just been invented and portables were more “luggable” than light.

There were dealers, distributors, software, hardware and networking companies (networking was where the techies hung out). Distribution would literally “stack it high and sell it cheap” and so my job as Product
Manager was to “stuff” the channel (i.e. sell as many into distribution as they could stomach with easy financial terms and buy-back options.) Then we would pitch up with cash, booze and sparklers at distributors’ offices and run internal promotions with the telesales teams to push that product out from the warehouse and into dealers.

We also ran road shows; going out to all the dealers with our projector and slides. Remembering that these were the old-fashioned wheel projectors with a box of transparencies to load up, preferably in the same order each time. Although, usually someone would have a deft hand and swap a few around to challenge the speaker, or just unplug a keyboard or two on the demo podium.

The computers would be on stage so that two of us could show how updating the old dBase database on one PC was then refreshed and could be seen on the other PC – WOW!! It was heady stuff. I remember early on at Ashton-Tate being given a “portable” to take home to learn the product with a bunch of floppy discs – only to discover that the lugging great thing didn’t have a hard drive, so I had to swap about 4 floppies in and out just to load the software. It was the days of the green screen and your day could be ruined by an inappropriate command prompt or c:delete*.*

And back in the day, every successful IT company had their drugs and rock ‘n’ roll stories. Meeting Ben Rosen in the bar at the Intercontinental at Hyde Park when I was working for Ashton-Tate; the rumour had it he had invented the Compaq PC on a napkin. And meeting Bill Gates in Cannes at the infamous SPA (Software Publishing Association), conference when I was working at Peter Norton Computing, to be told that every IT company grew from “… a family with a two-car garage and only one car…” (hence there was room in the garage to build a computer.)

And then there was Comdex where literally 100,000 computer nerds would show up for a week in Vegas, (I can say that as I was one of them, every year on year). Huge halls that had been dominated by the hardware giants such as IBM and Wang – now there was Lotus, Ashton-Tate, Wordstar, Symantec and Microsoft.
Marketing was still traditional with direct mail (as in, place it in an envelope and post it) and advertising in printed publications. I worked the phones, selling co-op advertising space to dealers who would all pay a small fee to be listed within a larger vendor advert. It was hard for the smaller vendor to be noticed because if you didn’t have budget to advertise or run PR campaigns and mailshots, there were limited ways to attract customers and dealers. One advert we placed in a major Sunday broadsheet, taking a huge risk and paying a huge amount for a small software company. There was a set of scales; on one side of the scales sat the Microsoft and Lotus products with their price tags (something in the region of about £399 back then) and on the other side of the scales was Migent’s Ability priced at just £99. It certainly caused a stir and got us noticed and for a while we did well; even getting a bundle deal with Amstrad. But we all know the outcome or conclusion of that story as the power and might of the larger vendor budgets won over.

The term VAR began to creep into the vocabulary around mid to late ‘80’s and soon there were a plethora of acronyms and phrases that began to litter my everyday conversation. At one of my earliest meetings in Microsoft in a room full of people in TVP (Thames Valley Park) and for the life of me I can’t remember what was being discussed but I was asked to “Contextualise” that? I wouldn’t even blink at that now, but back then, WTF? You had to learn to speak “Microsoft” and even now I still have Microsoft firmly printed on my forehead and will use their products in preference, maybe its familiarity or perhaps they are just better? Except for the episode with phones – but we all know how that went. The terminology has moved on at a pace and now we hear words like photolythology, t-cell receptors. Machine Learning (ML) and Artificial Intelligence (AI) are the new “black” – taking over from ERP, CRM and BI.

But what’s in a name?

A reseller simply doesn’t describe the complexities of the business model and a “Value Added Reseller” becomes a VAR which no-one understands outside our industry. More recently we have MSP (Managed Service Providers) and also the ISV (Independent Software Vendor) when in reality most ISV’s are anything but independent, as they are inextricably tied to
one platform. On a similar vein, a Vendor is described in Wikipedia as follows.

Vendor; a vendor or seller is an enterprise that contributes goods or services. Generally, a supply chain vendor manufactures inventory / stock items and sells them to the next link in the chain. Today these terms refer to a supplier of any good or service.

This includes both products and services which is already a muddle in the ICT industry and implies an inventory of products which is negated with cloud these days and predominantly where the serious compute power lies. Using a clothing analogy, this leaves the hardware and software to be value-add or accessories to the main garment.

I’d like to adopt some new terms; the reseller or VAR is to become the **IT Broker** and the ISV or vendor is to become the **Accessory** (software accessory or hardware accessory). In fact, I’d like the industry to accept these are far more ubiquitous and a sensible descriptives for those businesses (in my opinion from my kitchen in the English countryside). I think I might rule the day with IT Broker, but not sure “accessory” will catch on.

When working at a vendor you talk about “Partners” but I didn’t consider myself in the “IT Channel” per se until I was consulting; apparently, it’s more of a consulting term. However, with nearly four decades of experience in the industry, primarily in channel roles, coupled with a bias towards scientific and logical processes and you have this theory; putting science into social channel engagements.

**Current Industry Influences**

There has been much written about the flux and change in our IT industry which is worth examining as it throws a light on why social is going to continue to grow in importance.

In just a few years; cloud, mobility, AI and IoT (Internet of Things) has contributed to the general prevalence of new solutions as well as the
diversity of new routes to market.

In terms of routes to market; the dealer grew into a reseller, then into a value-added reseller and now more recently an MSP (Managed Service Provider) simply by virtue of bending to market needs and trends. To be successfully selling to customers, that IT Broker of products and services needs to manage the services and provide a “solution” not just a product.

I recently researched vendors and partners on the subject of “Partner Loyalty is a Myth.” The bottom line is that the job of engaging with partners is harder now than ever before and current trends are set to exacerbate this further.

More Tech - most vendors agreed that they are under increasing pressure to keep partners loyal due to the number of start-ups with new and innovative technology, all vying for partners’ mind share.

When questioning partners there was a marked difference to the product review cycle of software portfolios (reviewed annually or even continuously), whereas hardware portfolios tended to be stickier. This is particularly evident in areas like cyber security where solution advantage is changing so rapidly but a speciality in this field can dramatically increase margins. Partners with more complex combined solutions, where both partner and vendor are both invested, trained and working cooperatively in a joint relationship, remain more loyal and stick to that portfolio.

The shorter time for products to reach market, in terms of development time and even “low-code” platforms, the pervasiveness of mobile and the accessibility provided by the internet creates a landscape where there are more solutions clamouring for mindshare, increasing the pressure to stay competitive in a noisy industry.

More Routes to Market with online purchasing direct from the vendors and the trend towards partner mergers and acquisitions so that VARs who are thriving tend to be larger and therefore harder for a small vendor to engage. Temper that with the growth of the so-called “shadow” channel (Forrester: https://go.forrester.com/blogs/author/jay_mcbain/ ) and influencers and the
result is there being far more advisors and suppliers in the market. All this makes it is harder for vendors to find and engage the right channel partners and routes to market.

**Age or Experience** - the more traditional “trusted advisors” are still in evidence although rapidly aging. Referring to Forrester research, the management team in an average reseller is now well over 40 (Forrester: https://go.forrester.com/blogs/author/jay_mcbain/ ), but that can be a good thing. It is a well-known fact that most people become more agreeable with age; more stable, considerate, kind and mellow and therefore a little more pragmatic about the rapidly changing business landscape. In theory that should make me very agreeable.

However, this attitude amongst owners of reseller businesses (not the born in the cloud newbies), may have accounted for a slower adoption of cloud and managed services at some of those organisations.

Also, these businesses are just not the sort to be passed down from father to son and so many resellers are effectively up for sale, if not overtly, certainly open to offers. Many of these businesses have become more lifestyle business, if not by choice, but certainly by habit and they have valiantly sustained an office and staff and have a value.

This is verified by the huge number of acquisitions and mergers, certainly apparent in Europe, as larger VAR businesses acquire companies with the skills or specialisations that meet their growth plans and market need. And recent global Forrester research underpins this stating that 70% of MSPs are looking for an exit in the next 5 years and with 96% of them unable to scale their business past 20 years. The net result will be that the big will continue to get bigger.

What has become apparent is the off-balance sheet assets in these smaller VAR businesses; they have a healthy client list ready to move to the cloud or with cross and upsell opportunities, they often have niche skills and assets needed in today’s shifting technology market.

**Hats off to the ladies** - another key trend to note is that both vendors
and VARS have millennials in the marketing department and this is one area where “women in technology” are more than finding their feet and excelling. Many of the key marketing roles are held by the ladies. At the recent Channel Meet Up Conferences in the UK and the US attendee numbers verify this with over 75% being women.

These millennial women use social platforms; they are used to the immediacy and short, instant nature of such interactions. Millennials have grown up with mobile phones and the internet and are comfortable using technology. These ladies are also ambitious and tend to have a good eye for graphics and design so appreciate a well ordered and aesthetically pleasing website.

Worth bearing in mind when doing user acceptance testing for your partner portal.

Incidentally, women also excel as Partner Account Managers and Channel Account Managers which is no surprise as women are traditionally better at building relationships, as the “farmer” rather than the aggressive hunter-gatherer stereotype profile. Suffice to say, in this there are always exceptions that prove the rule.

Since marketing is invariably the “GO TO” department to liaise with vendors; to dig around in partner portals to obtain campaign information, sales and marketing resources or even technical documentation, vendors should bear in mind they are dealing with more and more graduate, millennial women who are used to working on social platforms to coordinate their lives. They wouldn’t dream of emailing all their friends to meet at the pub, they would just use a social App and it is these individuals who are crawling around your partner portal to find the appropriate content.

Customers are better informed having researched the solution options online and so they are asking for specific products and as a rule partners do not switch-sell to different brands.

Content Marketing - when it comes to content the industry statistics need
to be born in mind; some 47% of B2B buyers view three to five pieces of content before engaging with a salesperson and indeed 67% of the entire buying process is completed digitally before reaching out to a person (IDC: https://www.idc.com/). Partners are no different and partner recruitment is a buying process after all (more on that later). Yet we drive partners to dull and static websites where the buying experience can be shocking; the content is cleverly hidden and there is no ability to ask questions and engage with the supplier, vendor or distributor.

Content TO your partners needs to be valuable, relevant and consistent and address a clearly defined audience. Would you leave your customers and prospects to self-serve and struggle through? Sharpening up your partner UI is essential in 2019 and beyond.

When defining your “To Partner Marketing Strategy” these and other industry trends are making it harder to keep partners loyal to your brand.

Anonymous comments from vendors and partners on loyalty are recorded below during a recent market research survey I undertook. Individuals will invariably be more candid when they can be anonymous but feel their voice is being heard,

It comes down to products and proposition.

Partners can sell competitive products these days

You can only look after a certain number of partners.

A lot of this is out of our control as partners change hands

We are in cyber security and we are seeing an explosion of partner interest.

It is all about the marketing to ensure customers and partners are asking for our products

In summary, there is no shortage of biting, young and new technology out there with hundreds of thousands of new applications noisily trying
to outshine and grab the mindshare of customers and channel partners, influencers, advisors or brokers.

To recruit and keep a “partner” has become harder and harder so we need to find new ways to engage and hold the attention of partners and ensure that your product is chosen in preference.

**The Logical Steps**

**The Science Bit**

Now for a bit of creative plagiarism – to take the work of some learned professors of Behavioural Science and bend their theories to the world of Channels. Ref 1 Appendix 1

Firstly, you need to appreciate the status quo; within any company there will always be some level of *historical imprint* (the way they have always done things), and this needs to be shifted by adding a motivation and changing some other environmental factors such as making them aware of a new product, opening up lines of communication or simply posing a question that creates doubt or curiosity.

The effect of combining both physical levers (such as better margins), with social stimuli (exchanges, discussions, polls, interactions), should accumulate to *influence behaviour*. So, from a purely theoretical standpoint, we are aiming to shift the historical imprint by applying our channel levers.

For this, we will be using the basic law of repeat and reward – to affect and strengthen the new desired behaviour, it is all about reinforcement and repetition. In basic human psychology it means that desired behaviour is rewarded whereas undesired behaviour is punished. I am not suggesting for one minute that you “punish your partners” but the best outcome is to allow someone to excel and be rewarded on a personal level for a business decision.

It goes without saying that all the traditional levers must also be in place
such as finances, incentives and the systems to ensure you are easy to do business with. More on this later in Chapter 3, as I do not underestimate the challenges of ensuring your proposition stacks up, that it is properly verbalised and promoted and all your operational ducks are in a row. For now, I am going to assume that most of this has been done, so that you are looking at the nuances of improvements, rather than seeking a channel rethink or a new channel strategy (or a consultant to help you get the basics right).

Returning to the “Reward, repeat”, you will be familiar with the Pavlov’s dog experiment whereby a stimulus, such as light or sound was applied, then food placed in the dog’s mouth at that stimulus and after some time and multiple repetitions, the light and sound would cause the dog to salivate in anticipation. This is classic conditioning and I am not expecting your channel partners to start salivating at your product or service but, in essence, that is the desired result. It would be nice to think that they start to exhibit more positive behaviour with repetitive reinforcement.

Darwin’s theory of evolution suggested that human behaviour is just a slightly more complex version of behaviour displayed in other species and as such it is possible to control and predict behavioural responses in the same way.

Our more complex human version however means that it is also easier to get it wrong.

A recent example in the consumer space shows how superficial reinforcement (or a bad promotion), can affect loyalty. A friend “won” a prize at a 10K run race – only to find that to receive the prize involved having to show up, in person, at the shop location where they would then receive £10 off any spend over £60. Since the shop was a 50-mile round trip, the fuel alone, let alone the inconvenience, was enough of a deterrent. What should have been a positive experience left a sour taste.

Environmental aspects will always play a part and you need to know how the land lies within your partner ecosystem (has someone recently launched a new competitive product for instance). Canvassing your partners and
talking to your Partner Account Managers will help you identify the most likely blockers in your partner ecosystem.

Conflicts also arise and learning more about your channel can help avoid some of the most obvious skirmishes. For instance, a common situation that occurs is when sales and purchasing are at odds; sales may want to provide solution X for a customer but purchasing find there is only 3% margin on that solution and so that conflicts with a Finance Directive that looks for over 4% margin on any product and so this mitigates the desired result.

With the advances in computing power and AI there is a “big data” implication in the building of a large example to verify my suppositions. The understanding of behaviour using computer modelling, can and has been used to scale, with extensive computing power. I don’t have the computing power or the analytical training to build that model and will be looking at micro data only, but it would be interesting if someone performed this bigger study. There is a lot of research into behaviourism, underpinned by proper big data, and I would be fascinated to see the fruits of a social study for one of the big vendors – perhaps someone will get in touch and we can ask a suitable research organisation to perform the study with us.

To believe in your own study, (once you have pieced together the key elements based on this template and approach), you need to accept that a systematic approach to using levers to influence behaviour will change that behaviour. For those reading this who have changed a price or added an incentive this isn’t a hard pill to swallow as you have seen the results.

The objective is to ensure that every behavioural change in a person can be made more acute, predictable, faster and even permanent, in response to the right social stimulus.
The Application of Science

The Channel Challenge

The scientific process I pursue is to look at the challenges for vendors with a channel route to market. Then I describe the desired behaviours for partners with a view of devising ways to influence those behaviours with social interactions and exchanges. Finally, I plot a way to measure the actions and reactions that makes both business and logical sense.

The challenges will of course vary by vendor, country, solution set and all manner of variables, but the single underlying challenge is *I need more channel revenue.*

That may be interpreted as; I don’t have enough partners, my partners aren’t effective enough, only a few partners drive revenue, my costs of managing partners is too high, I don’t have enough PAMs to manage my partners, my partners don’t respond to promotions and incentives, I don’t know enough about my partners, my partnering experience isn’t perfect, my partners aren’t loyal, my partnering processes don’t seem to be working, my partner program is out of date, my partners don’t give me visibility of opportunities ….. the list goes on and on.

The social levers you can use and behaviour you are trying to influence will be dictated by the partner type you are addressing that is giving you the biggest headache, or the biggest challenge. These fall into three distinct categories: partners you are trying to *recruit*, those who are *active* and finally, those who are *inactive* or “occasional”. If you need to address all three types of partner, you will need three separate studies as the criteria you use for each will vary.

Many of the challenges can be met and moved using financial levers and increased efficiencies, but the assertion I make is that they can all be *significantly improved by adding a social layer to each of those levers.* And significantly that this can be done more easily and at scale with the right technology.
Just looking at the way Millennials and Generation X interact socially should give us a steer as to how communication and collaboration has moved forward recently. They don’t email but online chat, they don’t pick up the phone, they text – it is the immediacy, the instant, the short and the convenient that has changed the way they engage in a discussion with both personal and business colleagues.

Many have become attached to their phones and in some instances (and not always in a good way), online social interaction has taken over from personal interaction (which is not a behaviour I applaud), but the fact remains that increasingly the people you are dealing with in business are a generation who use social platforms. So, you need a blend.

The tech giants are rapidly jumping on this band-wagon with Facebook Workplace, Microsoft Teams, Slack and numerous other collaboration tools – but they are all focused around the individuals within an organisation, not the interaction between companies, (although LinkedIn does allow a basic company profile). Because, if you want to engage your channel partners or trading associates, you will want to be able to do so at both the individual and company level – adding a social layer that energises business relationships.
CHAPTER 2 - THE SOCIAL EXPERIMENT

Pick a Partner Type

Having identified your channel challenges and prioritised them will naturally lead you to identify and define your primary target partners to whom you need to apply this social study.

Pick your partner type; this will depend on your role in the business and the type of partners you want to influence and your biggest headache or challenge. The simple and distinct buckets are generally the same for all, no matter how big or small your company or even industry; recruitment, active partners and the rest.

The supposition is that the actions you take with each of these three buckets can be amplified and improved with some additional social communications and exchanges although the ways in which you can practically execute this will be different in each case.

We are looking to improve relationships, but the ways in which you can do that will differ. A simple example of a social stimuli is to pick up the phone, and if you are a Partner Account Manager with five partners that is perfectly possible once a week. However, when dealing with the dormant partners at a large vendor, there may be literally thousands of partners, making this impractical, so we have to find other ways to engage.
As a rule, the communications to all these partner types come under the umbrella of TO-Partner marketing.

**Partner Recruitment**

Partner Recruitment is a sales process, and, in most instances, you need to take the partner on a buying journey and nurture and educate them towards becoming active and generating revenue (for you and them) in partnership.

From a vendor or supplier perspective, the process starts with defining your ideal partner profile, then identifying and building a long list of potential partners. The most important job is to then nurture those partners along their sales journey, working with them so that they see the value in a partnership. There are then discrete phases of readiness and activation to revenue. Simples! Except it’s not.

For Partner recruitment, it is important to identify the key stakeholders or personas with whom you need to engage – targeting is key. As far as the study is concerned, with recruitment, you are looking to observe what
social interactions influences their decisions and propensity to choose your solution and what social levers you can exert to achieve that goal.

During partner recruitment the social levers will mostly be at the nurture and education stage, when you have opened up a dialogue but need to continue to nudge the partner along the sales cycle.

**Traditional partner recruitment dialogue**
Adding social provides far easier and more practical targeting of content, messaging and communicating that is relevant and valuable to the appropriate recipients. It’s a more pervasive approach to all of the individuals in the company you are looking to recruit. Social also provides a format for a dialogue so that the partner can better understand the opportunity, the solution and the supplying company. The partner needs to be nurtured across the business via multiple key persona or key “touch-points”.

Managed Partners

Active partners - usually the top 10 -20% that are regularly selling your product or solution, generating revenue and working with you on sales
engagements - are invariably PAM (Partner Account Manager) managed so one individual is directly responsible for communicating with the partner.

PAM managed partners already have a direct personal route of communication, but even that can be enhanced by offering easier access for more people within the partner. A mix of both formal and informal interaction is useful to test here as well as a mix of face-to-face and online.

In our research study, despite nuances, most vendors agreed that it was actually only the top 5–10% of partners who were PAM managed but these all benefitted greatly from having a direct relationship and Partner Account Manager and as a result were more loyal resulting in greater revenue earned – although it’s no surprise these are also invariably the larger partners. The direct relationship was driving collaboration, understanding and engagement.

In this segment of partners there is one unique social tool - the 1:1 business planning as this is an essential way to create dialogue and understanding. But don’t send a boy to do a man’s job and don’t let the discussion only revolve around pipeline but include true joint goals and business opportunity for both parties.

This is the easiest segment to track and usually the one that takes the lion’s share of the marketing budget and resources. Invariably this is to good effect as these partners are already well educated to your solution so additional attention can usually have an exponential effect on revenue.
Traditional active partner engagement structure

Sales  Marketing  Technical

PARTNER ACCOUNT MANAGER

ALLIANCE MANAGER

Sales  Marketing  Technical
Adding a social dialogue that is targeted, relevant and current enables far richer engagements and relationships to develop across the business. To do this easily and without creating additional workload, a suitable social platform that allows these private dialogues to take place is required. Ideally the platform or tool needs the facility to effectively group like-minded individuals together, in this way technical people across all your partners can be kept up to date about technical information and similarly marketing teams can share best practice and collaterals across all the marketing personnel.
The rest or “Long-Tail” of partners

The rest of your partners who are not directly managed are usually referred to as the “Long Tail” and these are partners who have sold your solution at some point, but not regularly. They may be inactive, they may be small, they may be lifestyle businesses – there could be any number of reasons, but the sad fact is that most vendors don’t know why they are the long-tail and not producing more business for the partnership.

The industry talks extensively about the 80/20% rule, but it was admitted by most vendors in our research that their unmanaged partners were probably nearer 90% and these partners were lower performing and often forgotten and neglected. As a rule, the long-tail is left to partner portals and marketing automation or, at best, distribution to manage. Vendors agreed that this was not good enough.

Some more anonymous quotes from vendors and partners about what drove a wedge between engagement of the long-tail;

*Channel conflict once experienced is never forgotten*

*The 90% long-tail is ignored – but in reality, it is more like 95%*

*Building personal relationships is good until someone leaves.*

*Joint marketing planning is good, but bad systems can ruin that*

*Vendors create lack of loyalty because they are not easy to do business with.*

*Joint goals are good, but usually it’s a one way “What’s your pipeline” discussion*

Managing the “long-tail” of partners for any vendor is invariably all about the systems that support them. Not having these in place, or slow unresponsive systems or processes can quickly sour the relationship. This includes systems that support every step of the sales cycle from marketing
and MDF programs through to deal registration and sales tracking.

There is a tendency to simply email blast the “great unwashed” (and yes, several vendors did actually use that term when describing dormant and unmanaged partners). Emails are not targeted but blasted out randomly to partners and individuals.

Distribution can and does play a vital role in managing the long-tail but beware that the vendor “attitude” towards their “long-tail” may be reflected in the distribution tactics. In so far as a vendor who has a lackadaisical approach to their “long-tail” partners won’t send the right message to distribution. There needs to be a collaborative approach between distribution and vendor as to how to run campaigns that educate and engage their partners.

Slick logistics at distribution can take away much of the system pressure and pain for a vendor, but focused, targeted information and education, coupled with a strong proposition and commercial incentives are still required. Campaigns to the long-tail need to be built in cooperation with distribution – not left to distribution.

From the partners’ perspective it is not always about getting leads but being allowed a seat at the table as many vendors exclude smaller partners from the advantages of Gold or Platinum status with costly barriers such as certifications and revenue goals. However smaller partners often have real tangible value with specialist skills or they may address a vertical niche market and vendors don’t facilitate communication and collaboration between partners which could make for a more cohesive and rich offering to market.

All partners recognize there is a market need for the large-scale partners with some corporations only buying from the “big-boys” but SMB focused partners feel strongly that small to mid-sized businesses still rely on their “Trusted Advisors” particularly around fast-moving on-trend products like security. From numerous conversations with partners their feeling is that vendors are not doing a great job of keeping this important swathe of partners informed, educated and engaged.
It goes without saying (but somehow, I still feel compelled to say it just in case…) that good margins, incentives, leads and joint sales engagements backed by good processes all help to ensure the vendor is easy and profitable to do business with. But good systems of communications are an area where there is often room for improvement to ensure messaging is targeted, webinars bring variety and networking events build a closer relationship. The variety in the marketing mix all needs to be supported by a good marketing automation system with both to and through partner marketing. Also, importantly there needs to be a way in which partners can interact with the vendor easily (that doesn’t tie up resources) and allows partners to interact with each other and build combined solutions to market. In this respect, partner advisory councils can be good but are often seen as elitist and excluding not inclusive.

I recently had coffee with a classic “long-tail” partner – a local reseller of some 14 people, selling managed services, support, some limited hardware and security solutions alongside some good IP of their own for data capture using any android device and cloud-EDI for useful data sharing into other systems or reports. However, the point is that when selling Lenovo, HP, Sophos and Apple from that sized business you are, by definition, the long-tail.

Interestingly, discussing this scenario to the owner; “..you are a long-tail partner”, the realisation and feeling was not one of frustration or disappointment but pragmatism and a desire for their suppliers to help them find a way to differentiate locally. New ways to attract footfall, new ways to educate their customers about new solutions, new ways to sell the ever-changing face of cyber security. Here there is a preference for unaffiliated accreditations (such as CompTIA and The Channel Institute rather than vendor specific), so that they can retain their trusted advisor status whilst gaining the recognition that their customers are in safe hands.

It really was all about education and information and help to ensure they can compete with the big boys or the cheap retail and online outlets. The vendor who can capitalise on this by putting an easily accessible, independent and agnostic training program together for partners about solution topics, (for free) which then guides them through their specific
product or solutions USP’s (unique selling propositions) and how it fits in the current landscape, might go a long way towards making themselves attractive to the long-tail.

The long-tail of partners in an average vendor often poses the biggest challenge in terms of resourcing, engagement and loyalty and so finding new, economic and innovative ways to bring this large ecosystem into the fold can bring significant results.

There is no single answer to the question of loyalty and no golden bullet to suddenly activate all inactive or “sleepy” partners as there are nuances to your solution, your offering, your partners and the market you address. But with limited partner marketing budgets and a headcount that simply can’t run to a PAM for every 5 partners, most vendors need to improve on the ways in which they wake up their sleepy partners.

There is always the nagging thought amongst vendors that a little more time and effort on the long-tail could be most cost-effective use of funds as you may convert some inactive partners into becoming active which would have a huge effect on channel revenue.

For this segment, a great deal can and should be done with social exchanges using an online platform to ease the load and scale.
Adding social provides valuable targeting so that content, messages and communications are relevant and interesting to the recipients. Marketing will most likely be the keeper of the keys to these communications, but a blanket newsletter with 20 pieces of content once a month in the hope that something sticks, won’t do the trick. Managing this process doesn’t need to
be a burden with a social platform and the tools to do it right.

Too Many Peas – Getting the basics right first

Having established which partner type you will be targeting, and before we start the modelling around new social levers and activities, there are some basic housekeeping duties that are required to sanity check your channel processes.

The single most influential reason a partner will leave a supplier is “ease of doing business” and so, first, you need to ensure your operational ducks are in a row, for which you need to go back to marketing basics and the four-classic marketing “Ps” of product, price, promotion and place. Once you have done your internal due diligence you can continue to the next stage of the modelling exercise.

These marketing principles are covered in detail in Chapter 3 for those who
need to reaffirm that they have the channel basics nailed on.

**Ready, Steady, Go!**

Let’s assume that your proposition to partners stacks up and all of your operational ducks are in a row. We want to influence partner decisions and behaviour so that they recommend and sell your products. We are going to build a system of examples of what social stimulus you need to apply when in recruitment mode or how to make active partners stronger or how to bring the long-tail partners to heel.

You have defined your channel challenges, you have prioritised them and understood which type of partners need your more immediate attention; recruitment, active or the rest.

Now we need to look at your partner personnel and consider which personas you need to influence. Large system integrators will look different to smaller resellers. You will know approximately the key functions you will need to have touched and convinced.

The next logical step is to describe the outcomes or the desired behaviour of each persona (or role model in your partners), as they move through the decision cycle or buyers’ journey and then we can finally pick the right social levers or communications and actions that will influence that journey towards the desired outcome.

- Current State - measure the status quo
- Top Challenge - define & prioritise your channel challenges
- Partner Profile - decide which partner segment you need to target
- Identify Key Personas - identify key personas in your average target partner
- Desired behaviour - describe the desired behaviour or combined target outcome
• Plot the journey - plot the buyers’ journey or decision-making process to arrive at the desired outcome

• Cherry pick the Social - pick the levers or actions you can take from the social spectrum to influence that decision.

In your specific environment or scenario there will be lots of environmental factors such as competition, choice, current promotions, financial incentives, FUD (fear, uncertainty, doubt), current trends, social visibility, endorsements and kudos. The possibilities are endless, but it boils down to 3 key things; risk, reward and satisfaction. Does your solution offer the least risk, the highest rewards and the best levels of satisfaction possible?

**Partner Recruitment**
The steps I am suggesting will give you a template from which you can evolve your own specific set of actions based upon your partner ecosystem. The “rinse and repeat” nature of your interactions with partners should provide the cognitive dissonance or reassurance to your partners that they have made the right decision. So, they make that decision again.

If your partners feel they have taken the correct path, earnt the most reward, avoided risk and their customers are satisfied with the results they will repeat that behaviour. You are aiming for a behavioural response that becomes pragmatic – we are asking someone to do something repeatedly to a given set of circumstances.

**Measure the status quo**

Prior to measuring the changes, you need to measure where you are, so that you have a clear picture of the current status quo. So far we have defined and prioritised the channel challenges and identified which partner segment is your biggest challenge. Now you can begin to shape the questions you will need to ask to set down your yardstick or to measure the status quo.

**Recruitment – your Status Quo**

You need to capture both the objective metrics as well as some subjective marketing activities that are important in your partner recruitment status quo. Some of these stages in your recruitment process will not be influenced by social levers (like “have you defined your ideal partner profile”). But I have included them to ensure you are looking at your whole recruitment process and then deciding what social levers you can apply to which stages in the process. This will also highlight what other areas might need attention, such as tracking the process – in which case some form of automation or system needs to be evaluated.

Below is just the start of a check list, one you can expand upon or limit to your situation.
Using social levers to influence the elements in green will affect those in blue.
These are the kinds of questions, and more, that you need to ask to establish your active partner status quo.

<table>
<thead>
<tr>
<th>Yes/No/How</th>
<th>Number</th>
<th>What social lever can I apply to improve this?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Active Partners</strong></td>
<td></td>
<td></td>
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<tr>
<td>How many partners are active</td>
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<td></td>
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<tr>
<td>What is the partner satisfaction score?</td>
<td></td>
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<tr>
<td>Do we run effective business planning?</td>
<td></td>
<td></td>
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<tr>
<td>What is the average revenue for an active partner?</td>
<td></td>
<td></td>
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<tr>
<td><strong>Activities to which I can apply social levers</strong></td>
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<td></td>
</tr>
<tr>
<td>Do marketing target communications to separate teams within partners</td>
<td></td>
<td></td>
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<tr>
<td>Can marketing increase online interactions?</td>
<td></td>
<td></td>
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<tr>
<td>How do cross company sales team collaborate?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Who influences Partner Satisfaction and are they included in targeted communications?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are all relevant teams within my partner aware of our proposition/promotions?</td>
<td></td>
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<tr>
<td>Can we track correlation between PSAT and revenue?</td>
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</tbody>
</table>
The Rest – status Quo

These questions will form the starting point as you define your status quo with the long-tail of less active partners.

<table>
<thead>
<tr>
<th>The Rest</th>
<th>Yes/No/How</th>
<th>Number</th>
<th>What social lever can I apply to improve this?</th>
</tr>
</thead>
<tbody>
<tr>
<td>How many partners are dormant</td>
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<tr>
<td>Do we know why they are dormant?</td>
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<tr>
<td>Is our marketing automation targeted and relevant to separate segments?</td>
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<tr>
<td>Do they sell competitive products?</td>
<td></td>
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<tr>
<td>Do we leave this group to distribution?</td>
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<td></td>
</tr>
<tr>
<td>Can we provide vertical or niche content?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can I run more partner events?</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Do we engage in discussions online?</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Can I run online partner events to engage?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can we help distribution run more effective campaigns?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do we know what these partners need to effectively sell our products?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>How can these partners ask questions?</td>
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</tbody>
</table>
Once you have a clear picture of your current state, then you can measure the actions and changes. Although every real-life situation will be different, my experimental guidelines below provide you with a consistent and prescriptive way to execute this, by customising the template to your environment, but with the same process flow. And I will repeat this process flow constantly because it is the scientific way to execute and achieve results.

The Process

In the way Pavlov’s dog learnt classic conditioning through repetition – I am using the same tactic.

- Measure the status quo
- Define and prioritise your channel challenges
- This will help you decide which partner segment you will target; recruitment, active or the rest
- Now list the kinds of people you want to influence – your target personas – this may be a single decision-maker or team of influencers throughout company
- Take the time to write down and describe the desired behaviour or target outcome. This may seem obvious, but there are nuances to every situation so think through the reactions you are trying to achieve, such as do more demos, visit the portal, call the sales team, place an order, etc.
- Understand the buying journey or decision-making process for your partners. This is not something we do naturally or in our everyday
working lives, as we think everyone will want to sell our solutions, but this is an important component of figuring out how you can influence and effect this journey for your described personas.

- Now provide a complementary list of effective interventions or actions. These are the social things that help them on the way and encourage them do the above, (desired behaviour); invite partners to join a discussion, asked them their opinion, suggest an interesting piece of content, congratulate them on an award, a sale win or promotion, etc.

- Monitor the results – is the desired effect reached or not? (Track it)

- Tweak, try again, rinse and repeat - who did I want to interact with, why did I want to interact with them and how did I go about it and has it made a difference?

The most effective way to assess behaviour is to think as your persona would think; “What is the result of me behaving in a certain way (purchasing a product or recommending it to a customer), what do I gain, how does it make me feel, what is the value to me and the business and how will it be perceived?”

I.E. What emotions does it invoke?

Importantly, how can you communicate the positivity of that effectively through a social interaction and also monitoring the flip; ensuring the behaviour will not have any negative connotations or effects.

Central Ethos

Anne and I have a saying at Channeliser; “Does it make the boat go faster” and our business beliefs and behaviour rests on what that implies. We were both lucky enough to have attended a “motivational talk” by Ben Hunt-Davies (MBE) way back in the 00’s when we were both at Microsoft – it was a truly inspirational talk and both Anne and I bought the book which describes the changes they made in their work ethic and the effect it had on
the GB Men's rowing eight, who went from winning nothing to winning the Gold at the Sydney Olympics in 2000.

The point is in the title – anything and everything you do has to map to a simple test – if I do that will it make the boat go faster? If I have that Gin and Tonic on a Friday evening – will it make the boat go faster? If I take a break now, will it make the boat go faster? You can easily see the analogy and how it has become a linchpin in many philosophies and Ben Hunt-Davies has made a lucrative career from motivational speaking and business coaching based on that simple ethic and that one line.

The context here in our study is will “that action” have the desired behavioural effect on my channel? Where “that” is the social action you take to positively stimulate your channel. You will see positive results if the answer is always a resounding “Yes”. Incidentally the book “Will it make the Boat Go Faster” is a sound recommendation as it will appeal to anyone, whatever your challenge, if you want to get your game face on.

Example Personas

Who to target is key and for this we need to borrow another hack marketing phrase “Personas.” Although overused when considering the end-customer it is rarely considered in the context of channel partners. The personas should relate to the individuals in the partner who impact or influence the sale, or the adoption or recruitment of your solution.

Personas need to be defined so that you can build your own personalised matrix for your business; giving you an understanding of who you need to influence to achieve the desired response so that you can then plot their journey to that decision and make a plan to influence that along the way.

Clearly, selling an ERP solution or selling a set of headphones will involve
an entirely different set of individuals and sales cycle. For some there may only be a single person, for others it may well touch sales, marketing, purchasing, technical, pre-sales, systems architects, operations and executives. Going through the process of defining your “partner personas” that have an influence is an extremely useful exercise in itself and in most instances will result in an immediate realisation that you are not doing all you can to correctly position and promote your solution, (See Chapter 3 for basic marketing principles).

Larger MSPs and VARs operate differently to the small, lifestyle reseller and VAR but if they sell your solution (or you want them to), you need to consider all the personas, so you can fully understand the effects your influence levers will have upon their behaviour. There has been extensive work done on Personas (example from Microsoft Microsoft Personas)

Your Partner Account Managers (PAMS and CAMS) are a great resource to help you work up the ones that matter to you.

<table>
<thead>
<tr>
<th>Partner Personas</th>
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<tbody>
<tr>
<td>Patricia Pre-sales</td>
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<tr>
<td>Dan the Distributor Product Manager</td>
</tr>
<tr>
<td>Ian the Influencer / Consultant</td>
</tr>
<tr>
<td>Sam Enterprise Sales</td>
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<tr>
<td>Margaret Marketing Executive</td>
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<tr>
<td>Sally System’s Architect</td>
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<tr>
<td>Charlie Chief Revenue Officer</td>
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<tr>
<td>Mark Marketing Director</td>
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<tr>
<td>Chan the Chief Executive</td>
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<tr>
<td>Mandy the Managing Director</td>
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</table>

Once you have defined your target personas, you need to build a list of desired behaviours or the target outcome for each persona, even if it’s as simple as knowing you exist. Ultimately, the objective is for each persona to feel more positive about your solution and brand after each interaction.
The more prescriptive and granular you can be the greater the value of this exercise. Below is a system of charts with examples, but the list is not exhaustive so knock yourself out and be creative.

**Desired Behaviours**

Following the logical steps, you now need to state what behaviours you want to drive in your channel businesses as a vendor or distributor. Once again these will vary dependent upon the partner type you are seeking to affect.

<table>
<thead>
<tr>
<th>Recruitment</th>
<th>How can I influence that</th>
<th>Did it work</th>
<th>What social lever can I apply to improve this?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visit your partner portal</td>
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<tr>
<td>Take certifications</td>
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<tr>
<td>Request a demo</td>
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<tr>
<td>Test the product</td>
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<tr>
<td>Involve all the key stakeholders</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Active Partners</th>
<th>How can I influence that</th>
<th>Did it work</th>
<th>What social lever can I apply to improve this?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make more sales</td>
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<tr>
<td>Sell more add-on services</td>
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<tr>
<td>Shorten the sales cycle</td>
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<tr>
<td>Generate more leads</td>
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<tr>
<td>Manage and share the pipeline better</td>
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<tr>
<td>Get referrals</td>
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<td>-------------------------</td>
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<td></td>
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<tr>
<td>Cross sell additional solutions</td>
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<tr>
<td>Make more phone calls</td>
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<tr>
<td>Make more appointments</td>
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<tr>
<td>Get through to more prospects</td>
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<tr>
<td>Do more demos</td>
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<tr>
<td>Send more emails</td>
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<tr>
<td>Pick up the phone</td>
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<tr>
<td>Answer more questions</td>
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<tr>
<td>Get results from surveys</td>
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<tr>
<td>Go visit a prospect more often</td>
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In most instances the desired behaviours of active partners and “the rest” are likely to be similar; ultimately you want partners to recommend your solution and sell it, in preference to all other competitive solutions.

You are aiming for partners to actively promote your solution and build it into their solution set.

When defining the desired behaviours, you need to take into consideration those for each of the personas or stakeholders. This may include any influencers, consultants, business professionals as well as technology, vertical, industry and specialists involved.

**Buying Journey**

The buying journey or decision-making process will be unique by partner type; recruitment active and the rest.
To construct the buyer-journey you need to see this from their perspective and using your PAMS and CAMs can help you build this picture or amend the chart below to fit more closely to your scenario.

**Buying Journey for Partner recruitment**

Research -> Interest -> Learning -> Evaluation -> Questions -> Endorsement -> Decision

<table>
<thead>
<tr>
<th>Role / Title</th>
<th>Research</th>
<th>Interest</th>
<th>Learning</th>
<th>Evaluation</th>
<th>Questions</th>
<th>References</th>
<th>Decisions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patricia Pre-sales</td>
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</table>

The content in the above table can be a simple yes/no (have they taken up references, were any questions asked?), or you can put a scale, perhaps one...
to five, of how thorough and positive the experience has been.

The partner recruitment journey should aim to take partners that little bit further, beyond a decision, towards loyalty and so that they not only **Know** about you and your proposition and any promotions but they have exhibited a level of **Interest** from which they have **Understood** the benefits of working in partnership with you and that both parties feel **Confident** in one another and finally there grows a level of **Loyalty**.

Here is a practical list of just some of the things you can do at each level of the journey.

**Research** – what sites, publications, influencing factors, distributors, exhibitions, conferences and social interaction play a role when looking for, or at, a new solution? What can you do socially to tap into their research cycle, remembering that most “research” is done in open public forums?

- Share survey statistics, industry facts and figures, quick tips.
- Suggest complementary solutions to investigate and combine.
- Point out recent analyst studies or media reports
- Finding a way to do this easily, personally and individually is more of a challenge but a combination of public social, collaboration tools, email, phone and text.
- Influencers can be helpful at expanding your reach on social platforms

The goal at this early stage is to ensure they know all about you and your proposition.

And critically, do you know if they know – do you have a marketing automation and track tool that shows what emails they have opened, what links they have clicked and what downloads about your solution have been downloaded?
If you don’t know what they know, how will you know what to still tell them?

<table>
<thead>
<tr>
<th>Know</th>
<th>You exist</th>
<th>Your company</th>
<th>Your solution</th>
<th>Your incentives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patricia Pre-sales</td>
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Once more, how you populate this table can depend on your solution; a simple YES/NO or a scale of one to ten.

**Interest** – Have they shown interest (by reading emails, downloading, visiting?) and importantly do you know what piqued their interest? Is it the latest and greatest technology, or financial incentives or maybe even playing it safe and how can you build this into your interaction with these individuals?

- If they have shown interest I am hopeful that you are tracking them using some form or CRM, PRM or Marketing Automation tool, this should give you information about which page they visited and from that you should be able to reach out personally – you do this for customer prospects, why do so few do this for partners?

- Your marketing automation tools should enable you to build a workflow that builds interest levels to help partners move to the next stage of learning.
• Sending out a quick poll (or asking the partner a few key questions), at this stage it is useful to understand what is motivating the interest, so you can react accordingly.

• When dealing with a large swathe of partners, it is always best to ensure you have covered the basics such as mitigating risk and maximising reward.

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<tr>
<th>Shown interest</th>
<th>Your company</th>
<th>Your solution</th>
<th>Your incentives</th>
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<td>Patricia Pre-sales</td>
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**Learning** – how do they like to build their knowledge, or do they delegate?

• This is persona dependent, but it needs to be easy. There needs to be a clear learning path so that nothing deviates them from making the time-investment to undergo a full evaluation (or delegate it).

• Vendors spend huge sums building videos for their customers, but what about partners? Short videos explaining the learning path, the incentives and how to work with the vendor are rarely seen and yet would provide a simple resource, you can send the link via email, share on LinkedIn messages and on collaboration platforms. Another helpful reason to stay in touch.

**Evaluation** – is it a demo, a site visit or would they benefit from an online chat?
• Again, demo videos are usually targeted at customers rather than showing the partner value proposition and how partners can effectively sell your solution.

**Questions** – how can they ask you questions? Do you have the ability to chat online or is a phone call required?

• A constant flow of interaction is feared by many PAMs who have to manage large numbers of partners, but you need to keep the door open for partners to ask questions. I am not suggesting you have a WhatApps group for all your partners, but you need to find ways to “chat” online easily. Partners need answers and they appreciate the social platforms that enable them to have instant immediate availability – it makes them feel included and valued.

• Don’t forget to respond.

Do you think they understand you, (have they asked the right questions) and have you reached out to understand them and their goals? This is where the real magic lies when you go beyond push marketing and to a true relationship where there is dialogue and interaction (online or in person). Social is an essential tool to leverage at this important nurture stage as potential partners move from just knowing you to understanding that a partnership is of value to both.

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<tr>
<th>Understand</th>
<th>Your company</th>
<th>Your solution</th>
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**Endorsements** – who are the important influencers?

- If possible, give them access to your customers or your other partners in a social manner. Allowing partner-to-partner engagement here is like the “TripAdvisor” effect whereby one partner can ask another “honestly” what the vendor is like to work with and how long it took to revenue? This is a rare and valued social interaction that really provides a unique level of insight into the company and is an innovative way to provide references. All this is facilitated by private social portals and collaboration tools. Alternatively, a two-way email introduction is acceptable but very formal and stiff.

Are you confident in them and are they confident about you and your solutions - have they attended training and certifications? Confidence can be broken by bad systems and processes as already explained but it can be built by peer reference-ability and social proof so more social interaction at this stage can really make a difference.

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<tr>
<th>Feel confident</th>
<th>Your company</th>
<th>Your solution</th>
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**Decisions** – are these taken alone or are all personas in a room together?

- Group discussions may appear unwieldy but with tools like Zoom and many others they are increasingly the way people like to hold
meetings, so if you can facilitate that for your partners with you placed centrally to answer questions then you are the one holding the cards.

Do you feel there is agreed mutual benefit, loyalty and the makings of a true partnership?

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<th>To recommend</th>
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**Complex Solutions and longer sales cycles**

If you have a more complex solution, it is likely that both the sales and recruitment process will be more convoluted and involve multiple personas, so you may want to build yourself a simple, graded or numeric system using 1 – 5 perhaps, where 5 is job done, or a popular and visible red, amber, green. A simple pivot table and graph can show this.
Active Partner

Research -> Interest -> Leaning -> Evaluation -> Questions -> Endorsement -> Decision

An existing partner will have already undergone stage one through four but remember that software undergoes a constant cycle of re-evaluation. Or maybe someone new joined your partner who’s brought new ideas of other solutions?

Being engaged with your partners on a social level will enable you to know more about them and see if they are going backwards.
Reactions or is it an Emoji 😊

The reactions you are trying to evoke range from awareness, through affirmation to decision and satisfaction. These reactions can be emotional, physical, subliminal and ancillary.

The following chart should give you the basics and what this is demonstrating are the stages and accumulation of reactions that you are hoping your partners will experience as they journey towards a behavioural change.

Finding a way to detect these sentiments is the holy grail.

Marketing Automation track the physical – we are looking to track the rest.

<table>
<thead>
<tr>
<th></th>
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<th>Physical</th>
<th>Subliminal</th>
<th>Ancillary</th>
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<td>Evaluate</td>
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<td>Judgement</td>
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<td>Choose</td>
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<td>Doubt</td>
<td>Conditions</td>
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You are not looking to use this table per se, but consider the contents and the emotional feelings you are looking to evoke – more a guiding principle than a working template.

Social prompts are the cue to elicit a response or to encourage the next desired behaviour. This builds into a chain of emotional feelings that lead to a physical response, (endorsed by subliminal and ancillary activities to ensure they are taking the right course of action).
Levers and actions

Finally, we are down to the important levers that you can press to impact behaviour.

Some of these actions will be blatantly obvious and others will be utterly impractical in your ecosystem; you may not be able to visit every partner in disparate locations. But in this world of social engagement and social platforms (both public and private), much of this can and should be done online.

Ultimately, this is where we are headed in today’s digital world in so far as connecting and interacting will be a digital touch. All activities are looking to drive the channel more effectively and exerting social levers will add personality, frequency and momentum – you are exploring new digital ways to ring their proverbial doorbell. We all know, you can’t call 1,000 partners every week but equally you can’t send them an email every week and expect to get different results.

Stop doing what didn’t work last time and do something different.

These levers will create the behaviour that you want your personas to exhibit. How you apply them is up to you; you can do it all manually, hiring a vast team of PAMS and field sales executives (which somewhat negates the reason for using a channel to scale). Or you can find a way to use social levers in a digital, grown up and innovative way.

It is proven that PAM managed partners yield more revenue, partly because they tend to be bigger, but also because they have a direct relationship. So, interacting with the rest of your partners as if you are their PAM, in a direct and personal way, is what we are looking to achieve. And the only way to do this without an increase in headcount is using technical tools to help.

To go beyond the obvious range of interactions (Like meetings, calls and online conference tools), you need to segment your target. For PAM managed partners you need to identify and segment the other personas;
the sales or marketing teams, the technical or system architects. For partner recruitment and the “Long-tail” similarly there is a grouping and segmenting process that is so important now so that you can target your social dialogue. If you don’t know who the marketing manager or sales executives are in your partners – find out. This will enable you to ensure messaging, communications, encouragement and engagement is relevant and interesting.

Grouping your personas together increases efficiency and creates more effective discourse; you can simply do it more easily, to more people, but with a personal touch in an online community of like-minded professionals. If you are lucky enough to have the right tools your audience will self-profile; joining the interest group of their choice as they are in marketing or favour a particular vertical. This can save immeasurably on the workload and also engenders a feeling of belonging as the individual made the choice.

Social prompts can be direct and overt or subtle and understated, all are nudging the partner forward down a sales process in the friendliest possible way, or to borrow a phrase; “in the best possible taste”.

The Direct and Overt Social Tactics – the obvious

PAM Managed Partners

For PAM managed partners, by definition, there is an element of physical, face-to-face and one-to-one involvement that are self-evident such as regular meetings, conference calls, making yourself available for an open breakfast, meeting at a conference, exhibition or social event, visiting their offices or meeting for a coffee.

The most obvious of vocal contact is to make a phone call and everyone in the “partner team” should be doing this, not just the PAMs as it develops greater learning and understanding. Interestingly, this is becoming increasingly hard as partner offices no longer have reception and you are often discouraged from calling but driven to the website and chat tools. But don’t give up as an old-fashioned chat can really cut through as you simply
can’t go without the simple etiquette on a phone call, you have to say hello, which in my humble opinion, is so frequently amiss with digital exchanges.

The above is the classic remit of the PAM manager. However, the rest of the vendor team can build on this relationship by extending a social olive branch to others within the organisation via visual and text social prompts (see below for the full range of subtle and understated).

**Partner Recruitment**

When in partner recruitment mode there may be some face-to-face, one-to-one interaction, this will depend on the size of partner and the solution set, but most of the sales process will be enacted online so you need to make the experience as personal as possible. For virtual meetings using Zoom, Skype or other conferencing tool, they can be made more interesting with a theme, such as a virtual lunch or virtual breakfast – so at a set time each week or month that is slightly outside of hours to make it convenient to attend. Circulate the agenda prior to the meeting if possible, to enable partners to contribute to the agenda and turning on video can make a real difference, especially in a smaller group. And make time for an open Q&A session and record the session for distribution to those who didn’t make it.

Most of this is just good conference etiquette making up the direct and overt interactions.

**The Long Tail Direct**

Mostly this will be managed through a marketing automation system where emails are sent to all partners. In an ideal world this should be more targeted so that your Newsletters and information is sent to the relevant people, but in reality, it is a DM blast to all. And therein lies the problem. Below is how to avoid this common trap.

**The Subtle and understated social Levers – the meat and potatoes**

Let’s assume you have segmented your partners into persona groups (or
better yet they have self-profiled themselves by selecting what “Interest Groups” are relevant to them). You can now have more relevant exchanges with that community, bringing them together to share best practices and experiences that are interesting to that group.

The range of online community tools now available to you to stimulate and encourage that exchange is extensive and far more effective than a simple email push. Building a community of this type is inclusive and personal and brings a sense of belonging – something sadly missing in many partner program structures alone.

- **Online discussions** are an ideal way to seek the opinion of your community, to pose questions and gauge the market. Not everyone in your community will have a voice, but may just listen from the sidelines, but they will be learning and absorbing all the time.

- **Blogs or short content bites** are such a useful tool but are usually dispensed as noise. However, when shared in your highly targeted community they can be a valuable tool to share experiences and best practices within your partner community. Allowing a reaction to the blog, so a comment facility, adds more stickability to each soundbite.

- **Polls** are used infrequently but can be a great way to engage a much bigger community or audience as you are simply asking one or two questions. Perhaps; I am thinking of running two promotions – which would you prefer? Or I am going to launch this product, should it be green, or should it be blue? Simple, quick, direct and a useful way to get some quick feedback from partners. And make their opinion count.

- **Forums** are most commonly used for technical support or for a linear thread of discussion about a single topic. Some vendors dread the availability of this tools as they feel it will absorb too much time and effort to curate, but if your partners are asking that many questions, surely it is a necessary evil. Invariably, others will jump in and help with the answers, so this is where a community really comes into its own as it becomes self-serving amongst its members.
• **Online Events** are a powerful way to communicate one to many but can be such a demotivation if the speaker fails to interact with the audience. I know how hard it is to present in a room full of no one, where you can't see the whites of their eyes or reactions, we did these regularly to our Microsoft partners. If you are going to run webinars (recorded or live), they have to be alive! Allow Q&A and keep them short and sweet.

• **Survey your partners** as they are an amazing resource, plus it will correctly steer your partnering strategy and tactics. There are numerous online survey tools available and combining a “Partner Satisfaction Survey” with a few market questions can bring immense value. Then share that back as a short article to your community of partners adds still more value. Top that off with a series of interviews by an independent 3rd party and this can provide real insight into the competitive landscape and other market trends.

• **Community Manager** is the person in charge of making sure the members are involved and their questions are being answered, they are the intermediary and the curator to ensure content is relevant and up to date. Your community manager is most likely a millennial who is social-savvy (although there are exceptions as I am over 50) and often a lady as they are just great at this and should manage these activities on public social sites or on your own private social community portal;

• **Comments** are a social must, but they need to be a two-way street. Responding to social posts shows interest and a level of engagement so if partners are commenting on your posts, you should reciprocate.

• **Likes** are in my opinion, social ego, but the easiest and quickest way to acknowledge activity. So, if your partners are posting your social content, showing a quick like lets them know you have seen it (you can set alerts or follow the appropriate companies or content keywords).

• **Shares** should be used sparingly otherwise you can be accused of
lacking creativity and originality but sharing your partner stories is right up there and scores you the highest points (especially when sharing the social posts of a smaller, long-tail partner). It shows you know them, you value what they have to say, and you underpin their proposition or content.

- **Direct Messages** can be an excellent way of having a chat that avoids the email inbox and they can be very personal. Something as simple as “…have you seen our latest information sheet – thought you might find it interesting?” can start an exchange which is, let’s face it, what this is all about. Although I believe there is a reticence (and I am not a great advocate), of mass mailing through tools like IM, WhatsApp and texts. Again, the non-targeted, scatter-gun approach sent to my personal phone is one of my pet hates; I resent my phone being cluttered by unrequested spam. But as a personal introduction to someone with whom I am connected, or within a community to which I belong, I am fine with that.

- **Notifications** can become a nuisance if not handled with care. You don’t want to receive multiple notifications into your inbox each and every day about a discussion to which you have not contributed or are not interested. This is where groups or segmenting is key as only those in marketing will receive marketing notifications of a new document or video uploaded. Or only those in your technical group will receive an important note about a product upgrade. It is all about targeted, relevance, current, short, informative.

- **Content** can be so easily lost on large partner portals and so being able to do a quick keyword search is vital. Content needs to be curated by the community manager to ensure it is always current and ideally there needs to be a proper marketing mix of documents, PPT, PDF, Video, pictures etc. Mix it up to keep it interesting as everyone engages with different types of content.

This is not an exhaustive list of prompts; the nature, number, and order of prompts are chosen to be the most effective for a particular persona.
The reactions to the above prompts need to be analysed to see if an actual change in behaviour has resulted. Ideally reactions need to be linked to a Task so a physical effort that can be tracked, such as placing an order, but initially it might be influencing marketing to run a campaign on your product. These smaller actions, or chains are the components of a task that can lead to the goal of placing an order. The chain-link from read, understood, asked, answered, calculated, assessed and decided are all the smaller chain-reactions that you can try to track by perhaps a site visit or an email or a phone call answered.

A few quick tips;

• Make sure your reason to communicate is a good reason
• Send a personal email rather than an automated one
• Pick up the phone more often, leave a VM, say hello.
• Call your partners to tell them about a new piece of collateral on the portal that will be of specific interest to them, then send it to them (even though it is available on the portal because it will still take 10 minutes for them to “look” for something when they could be selling).
• Canvass opinions and ask advice. Many of your partners and IT Brokers have been in business for many years and have valuable market knowledge that can give you the insight you need, you only need to ask.

The number one complaint from partners is management by dashboard and poor content management, so step away from the transactional and step up to building a relationship.

**The Maths**

What are you going to measure?

What new social prompts are you going to try out from the list provided that go beyond direct human interactions and how can you measure the results.
And significantly, what constitutes a positive or “important” change to you?

Clearly you can’t measure relief or contentment, but these are the emotions you are trying to drive so that they accumulate to effect a positive change in behaviour which you can measure.

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<tr>
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</table>

As mentioned earlier the above chart is a guiding principle, not a working template. This gives you the kinds of emotions you are hoping to attain.

The practical way to gather the results can be done in 3 ways for a full analysis.

First, using automation and tracking tools to report on physical results; so defined metrics such as revenue increase, product or collateral downloads, site hits and page views.

Secondly, using direct questioning of partners with a prescribed before and after assessment, this could be as simple as a rerun of the status quo questions.

Finally, there is indirect or descriptive assessments which can often be more effectively carried out by an independent 3rd party – but, it’s asking “how you feel about” the company and solutions, so more of an emotional state of change.

There are some formulaic ways to analyse this information so that you can deliver a scientific hypothesis on the results of your study where business
logic is applied to see what intervention or social prompt had the greatest effect for the least cost.

See below where the social actions lead to a response, which in turn lead to an emotional influence that leads to a behavioural change.

<table>
<thead>
<tr>
<th>RESPONSES</th>
<th>SOCIAL TOOLS</th>
<th>PROGRAMMATIC TOOLS</th>
</tr>
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<tbody>
<tr>
<td>Read</td>
<td>Discussions</td>
<td>Enablement</td>
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<tr>
<td>Comment</td>
<td>Blogs</td>
<td>Activation</td>
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<tr>
<td>Like</td>
<td>Online Events</td>
<td>Deal</td>
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<tr>
<td>Share</td>
<td>Articles</td>
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<tr>
<td>Message</td>
<td>Polls</td>
<td>Marketing</td>
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<tr>
<td>Open Notification</td>
<td>Forum</td>
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<td>Download content</td>
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<tr>
<td>Asked a question</td>
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<td>Joined a Webinar</td>
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<td>Registered</td>
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<table>
<thead>
<tr>
<th>EMOTION</th>
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<tr>
<td>More Positive</td>
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<tr>
<td>Neutral</td>
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<tr>
<td>Less Positive</td>
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<table>
<thead>
<tr>
<th>BEHAVIOUR</th>
<th></th>
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<tbody>
<tr>
<td>Book Revenue</td>
<td></td>
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</tr>
<tr>
<td>Book Demo</td>
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<tr>
<td>Refer a lead</td>
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<tr>
<td>Place an advert</td>
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<td></td>
</tr>
<tr>
<td>Pushed social content</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Used syndicated content</td>
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<td></td>
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<tr>
<td>Run a promotion</td>
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</tbody>
</table>
To explain, let’s use an example.

A discussion is started online in a private social community; how many partners read, commented, liked and shared this with a colleague (inviting someone else to join the discussion)? Who sent a direct message in response, how many opened a notification about that discussion, or downloaded the ancillary content or related article or promotion? Did anyone ask a question or join a webinar that was borne out of the discussion or did they register for the event it was promoting?

When you questioned partners about this discussion, were they aware of it and did it make them feel more or less positive about you and your solution and did it elicit a response that drove them closer to you and your solution, resulting in a behavioural change?

Rinse and repeat across your version of the matrix.

The interpretation of this information is where art takes over from science and most likely this final mile emotional decider will dictate your new social policy.
CHAPTER 3 - TRADITIONAL CHANNEL BEST PRACTICES

The traditional levers – getting your ducks in a row

The Classic Marketing Principles of “P”

In the meantime, it is worth mentally following this “Classic Marketing P” to validate your “TO-Partner” proposition. The basic premise of the classic “Ps” being that they all need to be just right to sell. These can be extended by three to include process, people and physical evidence.

You could keep going with this “P” analogy and include packaging and presentation.

More important, in our industry we add PROGRAMME and PARTNER which gives us a total of 9 important Ps all of which play a part in the 10th P = performance.

My suggestion would be that before you start to test your channel’s susceptibility to socialise, you take a fresh look at your business – just to check. Doing a proper naval gaze (or hiring an independent consultant to do this on your behalf), will ensure that you not only have your ducks lined up, but your Ps are as strong as they should be.

Product - working through these simple questions will help;

• Do you have a differentiating factor?

• Is it clear and well verbalised?

• Have you tested it with the market and your target?

Price - pricing has seen a massive shift in recent years, not only moving from a project model to a subscription model and from products to services, but also the visibility. You now expect to see “Pricing” listed on a vendor website and all prices to be clearly displayed. I know that I become
frustrated and will move away from a site where I can’t find pricing easily.

From a partner perspective this has made it harder for them to make money as visibility shrinks potential margins; capital purchases are pushed through the larger retail outlets who can operate on volume and the smallest of margin and smaller partners have to identify a niche or be able to capture their value in just a few words so customers “get it” and don’t just buy cheap because they can.

**Promotion** - the days of the holiday prizes and cash incentives is nearing an end; having attended the Channel Meet Up (LINK) event with more than 50 vendors, they all agreed that incentives need to be ever more highly tuned and targeted. There are tax implications, and sending all your top sales people on holiday on the same week may not be such a great idea.

But giving a personal reward for a business decision is still utterly valid, but finding the right reward, that works, is an art form. My suggestion would be to ask the experts and then test the incentive before going live on a larger scale.

**Place** - traditionally this stood for where in the shop your product was displayed so it was all about physical positioning. Taking this forward in today’s environment it would translate as the way in which products are displayed on websites and, in a channel route to market, this comes down to how a vendor can share product information with partners.

Content sharing (or content syndication), needs to go one step further so that partners can easily design and display multiple vendor information on their websites. There are some good tools available for vendors to help partners achieve this and research shows that partners value this as it saves them web development time.

**Process** - within our industry “process” takes on a significant emphasis and meaning, as we are used to using automation tools and systems and we expect them to lighten the load. It is important to review your “processes” and ask yourself honestly – is your partner user-experience as good as it should be? Does it match the user experience for customers? Invariably the
answer is “no” as partners are pushed to a dull static partner portal where they struggle to find the information they need, something on which I will expand later.

There is nothing more frustrating to a partner than struggling to log a support call or being effectively given the brush-off when their question is not given a priority. It may be a simple question but sometimes getting hold of a “person” is virtually impossible. The world of AI comes powering in with predicted answers and FAQ lists when a simple dialogue could do the trick. I am a big fan of automation but not at the expense of efficiency.

How to guard against poor partnering perception; test your partner “experience” as you would your customer facing website.

**People** - is your passion for the business reflected in the culture and the leadership and does this flow right down to details like email signatures and the speed of response to email questions and, most importantly in this context, does your company truly believe they are channel centric?

If you walk into a busy restaurant or pub, you only need an acknowledgement to say; “I’ll be with you in a moment…” The fact that you have been noticed, your custom is important to them and you are valued is acknowledged in that simple gesture. Do all your people have that same attitude to your partners?

There is an old phrase; “Business would be great if it wasn’t for the customers” and sometimes that is magnified with partners especially if the culture has been a direct sales model that is in flux moving to a channel model, or you have a mixed model.

The channel culture needs to come from the top.

**Physical Evidence** - references are increasingly important as a small start-up with a new solution can “appear” as solid, stable and convincing on their website as a proven solution that has been in market for years. In some instances, new and “leading-edge” is good, but are customers prepared to take the risk with “Bleeding edge”?
I have learnt to my cost; taking up references only takes time, not money. But where do partners take up references? This is where a true social community can have a hugely positive effect as partners can gain that “TripAdvisor” effect of learning from other partners what the vendor is truly like to work with and how long it took them to go through accreditation or reach revenue?

This could and should be a powerful tool when doing partner recruitment.

**Packaging** - cloud has removed some of the need for physical packaging which still holds much sway in the world of FMCG (fast moving consumer goods). We rarely see a product displayed, in a box, on the shelf. Pictures of Peter Norton are no longer de rigour. Shame really.

**Presentation** - luckily there has been a huge leap forward in the way in which all IT companies present themselves on their websites. However, test, test again and then test once more. Perhaps ask your 10-year-old and your grandmother to take a look and tell you what they think the company does simply based on the website? It may sound extreme, but if they just get it, you have succeeded where many others have failed.

Perhaps more importantly, as a vendor you need to educate your partners on how to present your solutions. Web page and content sharing is one step, but helping them to differentiate themselves, with your solution, is a game changer.

**Program** - partner programs invariably follow a tried and tested formula of “Gives” and “Gets” with greater rewards for the partner as their sales increase. The danger is they can become unwieldy and complex, back-end loaded, system dependent and thus prohibitive for all but the largest partner who can allocate a dedicated resource.

There are the obvious elements within a partner program that most vendors know are a “Must Have” although partners have reported in our discussions that some of the newer technologies, who are new to partnering, didn’t always include even the basic partner program elements. For these vendors who recognize they have immature partner programs or a channel in its infancy, we strongly recommend working with a Channel Consulting
This can really accelerate your time to market – the money spent will be money saved in recruitment, readiness, enablement and activation if done right the first time.

Programs need to strive to stay as simple as possible, while supporting and educating partners. That’s the important bit; support and education.

**Partner** - if you have chosen a channel route to market, remember that it is a partnership, the clue is in the name. The relationship needs to work for both.

As an aside, using third party researchers can give you some excellent insight into your channel business. As already mentioned, partners talk much more freely when they are part of an anonymous group of contributors and if you use channel specialists to execute the study, they can engage the partners with intelligent repartee (I should know, we have done a lot of this over the years), and this dialogue usually reveals some interesting anecdotal evidence of what they are up against and how you, as the vendor or distributor, can help.

**Automate IT**

Using the right tool for the job is key, so look closely at the automation of your channel processes. There are multiple technology solutions available to help automate some of the channel processes and to increase efficiencies. Being “easy to do business with” is essential and so picking the right experience for partners, alongside increased efficiency for you the vendor, is a vital component for success, especially if you have limited budgets.

To give you the full range of solutions out there, Forrester produce an exhaustive work on the >100 “Channel Technology Stack” ([Forrester:](https://go.forrester.com/blogs/channel-software-tech-stack-2019-infographic/)), which tend to fall into two main categories; the Channel Suite (those that cover most if not all aspects currently considered to be the technical needs of channel centric companies, provided conveniently by one supplier) and the Best of Breed (those who provide the latest and greatest solution to one issue of channel management). My personal preference is
always best of breed.

Note however that the Forrester study only includes companies with more than 100 customers and so excludes some great start-ups and quite a few that have been around for some time too.

If you think about it, best of breed is emerging triumphant in the ICT channel as well. With so many solutions in market no single IT company can work in total isolation and provide all the technology solutions required by an average mid to large customer. Mostly, the channel needs to “Partner-up” to find complementary technology, skills or other specialists to produce a combined solution that is best for the customer. So too in Channel Tech.

Traditional systems for channel technology businesses emerged with PRM and Learning Management Solutions, born from CRM solutions and customer learning tools. The Suite Solutions have predominantly been built through acquisition and integration of these early tools, (or more bluntly some are an amalgamation of multiple purchased systems cobbled together). Most were not “born” to work together and in some cases, they are relatively old base technology if you dig under the covers and in a few instances, they can even be rather cumbersome. More fundamentally, they rarely address the real issue of maintaining and growing partner relationships but deal with the tracking of historical transactions.

For distribution tracking transactions is essential and slick logistics are a must, but increasingly, as competition hots up, distributors need to add value to keep the latest hot vendors and the biggest VARs on their books.

On the whole, the channel technology stack solves the transactional needs of the IT Vendors and distributors, such as deal registration, order tracking and channel data analysis. Marketing automation is now added as an efficiency but mostly systems still focus on the management aspect of partnerships; managing communications and managing transactions, before, during and after the sales cycle, but not actually driving the relationships themselves.

Best of breed solutions are not only newer, born in the cloud,
surrounded by API’s so tend to offer, in my opinion, the better solution. But also, they go beyond the money and help to drive the relationship as some of these systems can add modules that incorporate social interaction which is vital to driving relationships; it is that all important final mile.

**Partner portal technology**

While at Microsoft as product manager for the retail products in the Microsoft Dynamics team, I was effectively a PAM for retail – looking after the retail partners selling Microsoft Retail Management System and Dynamics ERP NAV and AX into retail customers. One of the most common complaints was the lack of easy access to information on the partner portal – everything was buried in layers of complexity.

Partner portals have improved immeasurably since then but even now it can take perseverance and time to find what you are looking for unless you know where to look. With today’s advances in technology you would have thought this issue had been resolved, but some still believe that, since they are a technology company, they can build it themselves. In my experience, these vendors are not in the businesses of building partner portals and so should choose best of breed and outsource, rather than limp along with clunky and cumbersome portals (not that I am accusing anyone of having a clunky and cumbersome portal, honest!).

Many of the larger vendors have invested heavily in new portals but some still divert their own development resources to build it themselves, bending their own products in some instances. Please know that there are some great systems out there that have been built from the ground up specifically for this purpose.

Research from The Channel Company, ([https://www.thechannelco.com/](https://www.thechannelco.com/)) endorse this stating that some **66% of partners are not happy with their vendors’ portals** and the industry average is that just **17% of partners visit traditional partner portals**. Naturally this will have a negative impact on loyalty and engagement if unnecessary time is wasted just trying to access information to be able to sell the solutions.
There simply has to be a better way.

**Nuances of testing**

There are some additional science bits here for those who want to go deeper analytically, but for those that don’t, just skip the next page or so, to the section heading “Example Personas”

When measuring behaviour there are two elements; quantifiable (did they / didn’t they?) and dimensions (by how much?). There is also the question of repeatability – did the respondent exhibit the same behaviour again and if so, how often and with or without additional stimulus?

Then there is the similar question of response lapse – so how long it takes until the desired behaviour starts or stops happening. All these measurements are important as they correlate to things like; how often should I call my partner, how often should I send information emails, run promotions or engage in some predefined way?

There is also secondary reinforcement. This means that adding more data or stimuli that also hopes to achieve the desired behaviour, (such as communicating an incentive or circulating a white paper or case study) will help to influence the right outcome. At this point marketing automation can assist as it tracks downloads, visits, clicks, etc. To ensure that the additional data or stimuli has been seen and action taken.

From an analytical perspective, there are numerous levels of measuring behaviour, I am limiting this to just two for simplicity, but importantly adding the 2nd here as “influencers” within other companies are so frequently forgotten. Interestingly, they are clearly signposted in any sales training – make sure you know who holds the budget / what is the chain of decision-making / who ultimately makes the decision / etc. But we rarely think this process through in partnering organisations but it is a linchpin to social which allows you to spread the net beyond a direct 1:1 person to person engagement.

- Direct functional analysis - when conditional responses or
consequences are assessed in the behaviour of the intended recipient. So, did your partner vendor manager receive and respond to that promotion, email, survey, question, etc.?

- Ancillary, descriptive and indirect assessment - which could be the effect on a different department within the business. Results can be gained by interviewing those associated to the decision-maker and this forms an important part of the due diligence. Once again, I am a strong advocate of using a 3rd party to conduct this research as people are more candid with researchers when their responses can be made anonymously. This research can give you more information and perhaps the backdrop for the key persona’s decisions. It can also identify key environmental issues you may not have been aware of such as new competitive promotions or product launches.

**A quick example to demonstrate how you can perform a simple test**

This example follows the process in its barest form, to demonstrate how easy it is to build a real-life scenario. If you have a genuine desire to measure the positive impact of socialising with your channel it doesn’t need to be a monster exercise – keeping it simple will prove the point, then you can expand the experiment.

**Company CloudyRay** - have a low-code development platform that equips the user with the tools they need to build business, web and mobile applications easily with the minimum of coding. Their solution accelerates the speed to market of software design and the migration of existing solutions.

**Current state** - CloudyRay have 30 partners who are using the CloudyRay platform to build solutions or migrate their customers to a modern cloud solution. These partners are a mixture of larger system integration companies, smaller development businesses and digital marketing agencies. The size and complexity of their partners varies immeasurably from the large SI with thousands of employees to small digital agencies and CloudyRay needs to ensure they increase their knowledge footprint in the
larger partners while supporting the smaller partners into the larger deals.

**The challenge** - is to spread their resources appropriately and effectively by ensuring that everyone involved in the deals have reached a knowledge bar or can attain that without extensive hand-holding. The smaller companies are more agile and can aggressively go after new business but need the weight and gravitas of perhaps partnering with an SI to deliver the project.

- Ensuring everyone has a knowledge level and can access the tools they need to sell, market and deliver the solution
- An ecosystem that fosters collaboration between the partners

**Personas** – within the partner types there are every conceivable job role and the aim is to spread the good word throughout the organisation, so easy access to the portal and information and push notifications will come into play, but focusing on two key personas who will have greatest influence;

- Creative lead and account managers in digital agencies who need to know the capabilities of the solution so they can identify and drive sales opportunities
- Solution architects in the big SI’s need to be made aware of the possibilities of a low-code solution rather than think traditional coding development cycles.
- Account managers (or the nearest title) in both organisations need to know there are resources available in the partner ecosystem so they can put a team together, a mix of partners, who can deliver greater value, faster, together.

**Desired behaviour** – the overarching wish is to drive more personnel from partner companies to the CloudyRay Portal so they are “sheep-dipped” in the learning of how to market, how to sell, how to enthuse and enlighten and how to help customers achieve their solution goals faster. To do this a drip-feed of prompts and information needs to flow to the influencers in
the partners.

- Visit the portal
- Spread the word

**Plot the journey** – the create leads, solution architects and account managers are going to be switched on by different messages (in terms of content and delivery), so rather than sending stock-standard emails and newsletters with 20 stories in the hope that the right one sticks, you need to tailor the content and target the outreach.

- Creative leads – quirky and different exchanges that pique their interest in a new way, with content that provides a dawning realisation that they can deliver in an innovative and new way to their clients, e.g. an Infographic.

- Solution architects – notifications and communications that point to content that builds their confidence; so they move in a systematic way from research through learning to endorsement e.g. a White Paper

- Account Managers – prompts that point to content that demonstrates the value in the partner ecosystem so they form a relationship with other businesses that will help deliver; such as an invitation to connect with another business online. Also, commercial content that endorses the value e.g. promotion

**Select the social levers**

This is not exhaustive but again, trying to pair things back so the mapping of results is easy to identify and attribute to the additional social activities.

Creative lead

- A push notification to a marketing best practice community.
- A poll to gauge opinion on a new piece of marketing collateral
Solution Architect

- A direct message and email pointing the way to a useful White Paper
- An invitation to join a forum for technical best practice discussions

Account Managers

- An invitation to connect with another company
- An invitation to join a collaboration group
- An email that points to a promotion and ROI case study

Now all that remains is to build the necessary content (which most self-respecting, channel-centric vendor will already own), so the tests can begin.
CONCLUSIONS

To influence the behaviour of your channel and trading partners, you need to have all of your operational processes and ducks in a row. Negativity over a bad process or system will overrule all of your positive social efforts.

Fundamental to science is that there is something tangible that can be measured. If you can observe it, you can track it. So, you need to measure where you are, make the changes and measure where you reach.

The art form of channel are the nuances of human inconsistency. You will need a blend of science and art and hard work to drive positive change in your channel.

This book aimed to provide you with the templates from which you can build all the elements you need to drive social communication tactics into your channel partners. If you observed the stages and cherry picked the appropriate elements, according to all the unique aspects of your business, then you should have challenges, desired behaviours, influencing factors, ecosystem considerations and nuances. Applying social communications should then be tracked to demonstrate an increased engagement and thereby increased channel performance.

Following this process of science and analysis formulaically, will then demonstrate how adjusting social levers can and will build a more effective and successful channel.

Social shapes behaviour gradually, modifying the existing behaviour into the desired behaviour and with continued reinforcement this shaping can become permanent.
Some Suggestions and Best Practices

Marketing Best Practice suggestions

- **To-Partner Value proposition** – have you verbalized and validated this recently, is it current, does it resonate with partners, have you tested it with partners?

- **Nurture the long-tail** - address the long-tail and don’t just make it a one-way email blast as there is a great opportunity to stand out and be different. There may be real breadth of experience and opportunity in this partner group and they will move away if not nurtured. Be responsive and ensure all partners’ questions are answered, (including the long-tail), this will go a long way to making smaller partners feel valued.

- **Partner-to-Partner** - find ways to help partners to work together. In most partner ecosystems partners strive to differentiate and they can benefit from understanding each other’s role and position to form a tapestry of complementary and non-competitive solutions. Facilitating collaboration between partners can bring real benefit to the ecosystem; they can find skills and resources and business opportunity.

- **Channel Data or channel profiling** - understanding your partner channel is like a jigsaw puzzle; you need to work with them to see what they need to add to be successful. Each partner is different, and a one-size-fits-all approach will not be successful. Have enough in your kit bag so you can offer a partner benefits that have value to them. Segment partners to reflect what they need to know and communicate to them via email and F2F with information and content that is relevant.

- **Communication and Collaboration**
• Be inclusive and stick to it.

• More tailored, targeted and personalized communications not DM blasts.

• Be a facilitator of better collaboration with and between partners

• Handle partners’ questions efficiently and effectively; make someone responsible.

• Use the full marketing mix; webinars, newsletters, F2F events and networking.

• Joint co-branded sales events work well.

• Social media helps drive partner engagement as well be a useful through-partner marketing tool as it shows partners how to use the vendor content and how to connect and generate opportunities with customers.

• Using a mobile app to push content and run loyalty programs can be effective but some individuals are resistant to constant push notifications on their personal mobile phone.

• Be aware of Corporate brand guidelines and ensure partners are informed.

**Sales Engagement**

• *Selling a solution* - rather than a product helps with loyalty as both vendor and partner are jointly invested. This can be initiated by the vendor to team up or bring in other vendors, so partners see the benefit of an all up solution-sale. Solution sales create loyalty as they are unlikely to swap out one component

• *Being open* - is an important factor to working with the partners and recognizing it’s not a hierarchy but a partnership; collaborating
and sharing and enabling a 2-way conversation, especially in sales engagements.

- **PAMS** – they know their partners so use the intelligence to help gain an understanding of the partner community and their needs

**Operational**

- **Being easy to do business with**, as a company, is key to looking after the long-tail.

- **Good systems and portals are key** – back up communication programs with a system to support the long-tail, where they can find the information they need and ask questions. Whilst appreciating that you can’t necessarily speak to and ask each partner what they want, being inclusive is important and so find systems that facilitate this and then ensure you resource that and stick to the plan to include all your partners.

- **Operational efficiency** - is something to strive for; capturing data and categorizing them is key and then using that intelligence to structure the right programs.

**References**

Ref 1


- *Skinner, BF (1976). About Behaviorism*