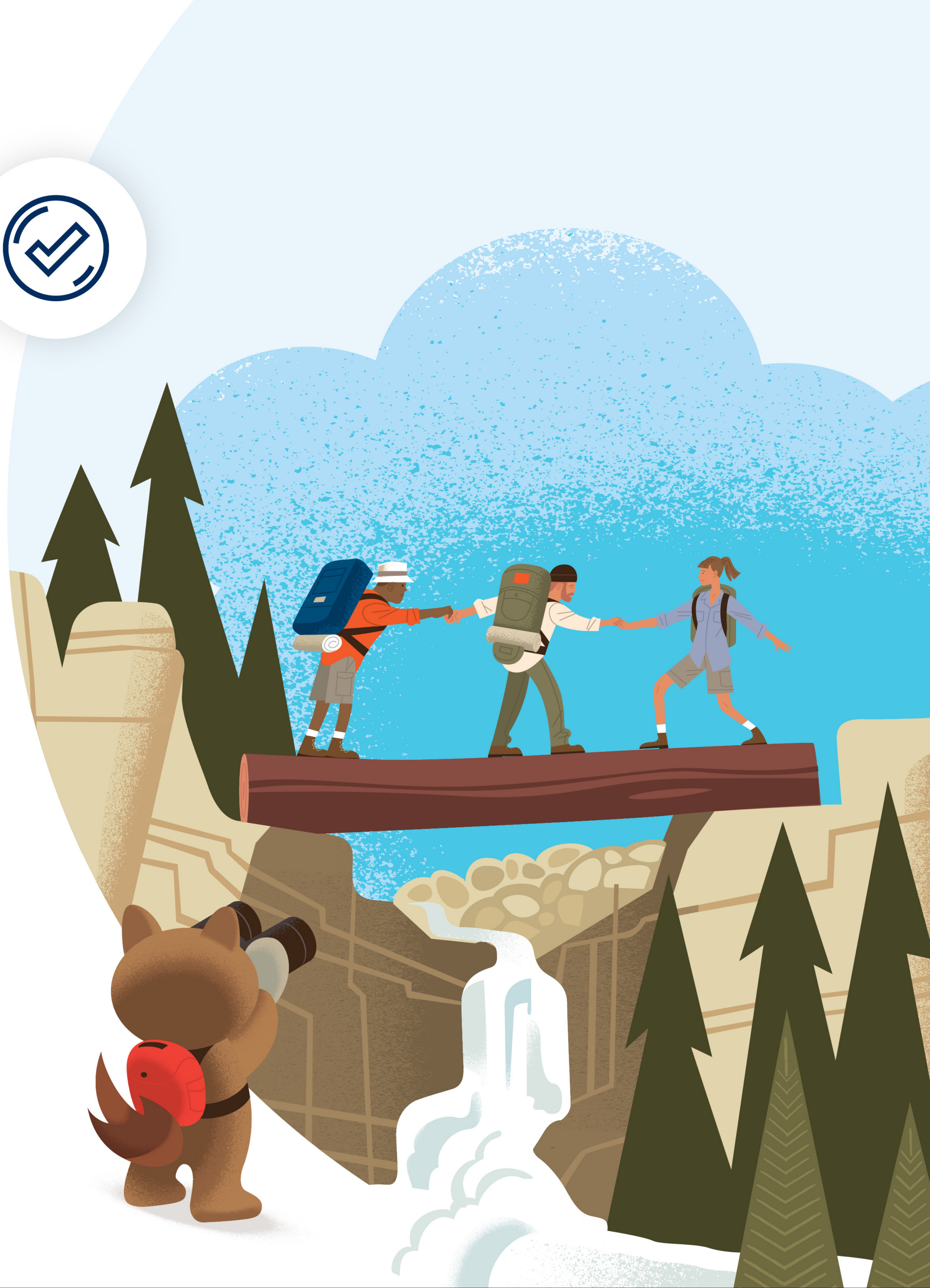
Channel Sales Guided Workbook



Created by Salesforce

Learn how to optimize your indirect sales channel with our partner relationship management solution.

Welcome!

This tool is intended to help you develop your company's channel sales strategy. Use the templates and prompts below to guide you as you formulate your vision and action plan. Simply print or make a copy of this document and populate your own company's information, getting input from stakeholders along the way. Having a North Star will set you up for internal alignment, partner engagement, and overall channel success.

Contents:

Channel Sales Mission and Vision

What it is:

First, articulate your company's overarching vision and mission. Then, create a vision and mission statement specifically related to your channel sales program.

Why it matters:

It's important to align on why you're building an indirect sales channel, and how that fits into your broader corporate strategy. Your mission and vision play a pivotal part in your strategic planning process. They give you a sense of purpose and direction, and will help with decision-making down the road.

A vision statement looks far into the future, is aspirational, and focuses on the ***why*** behind your work.

For the channel vision, consider moving from what you can do to or for your partners to what you can accomplish with your partners. Better together!

A mission statement has a medium-term horizon (think 3–5 years), is quantifiable with goals and objectives, and focuses on the ***what*** and the ***how***.

Company's Vision Statement	
Company's Mission Statement	
Channel Vision Statement	
Channel Mission Statement	
How does the channel ladder up to the overall corporate strategy?	*Example: Regional partners in APAC will allow us to accelerate our global growth efforts given their familiarity with the market and customer base there.*

Channel Program Value Proposition

What it is:

Create a clear point of view on why partners would choose to do business with you. Communicate the value of your partner program by laying out what you intend to bring to the table.

Why it matters:

You've likely already thought through why a customer would buy your product – but why would a partner sell it? What's in it for them? This is your opportunity to plan and articulate what prospective partners stand to gain from working with you, and why working with you will be a valuable experience.

Tips and must-knows:

Creating your value proposition is a multi-step process that begins with evaluating your current position – in terms of both your company's competencies and your partner program.

To help differentiate your business for prospective partners, make your value proposition prominent on your website and in partner recruiting materials. You're setting yourself apart from competitors and other businesses.

STEP 1: Diagnose Your Competencies with a SWOT Analysis

KEY ANGLES TO CONSIDER:

- **Market momentum:** Are our products already in high demand by customers? What is our market share?
- **Reputation:** How do customers and partners perceive our brand?
- **Resources:** What unique resources can we draw on, and/or where do we have fewer resources than others?
- **Partner relationship:** How do we support and engage with partners? How easy is it to do business with us, and in what ways?
- **Economics:** How strong is the financial opportunity for partners doing business with us? What are the costs and benefits to them?

STRENGTHS

What do we do well as a company and as a partner program?

WEAKNESSES

Where do we need to improve as a company and as a partner program?

OPPORTUNITIES

What trends or conditions could we take advantage of as a company and as a partner program?

THREATS

What obstacles do we face as a company and as a partner program?

STEP 2: Build Your Value Proposition to Partners

AUDIENCE Who is the target partner/persona?

NEEDS What are their key challenges?

OUTCOMES What are the opportunities for partners in doing business with you?

ALTERNATIVES What other alternatives might partners consider? Alternatives can mean your competitors!

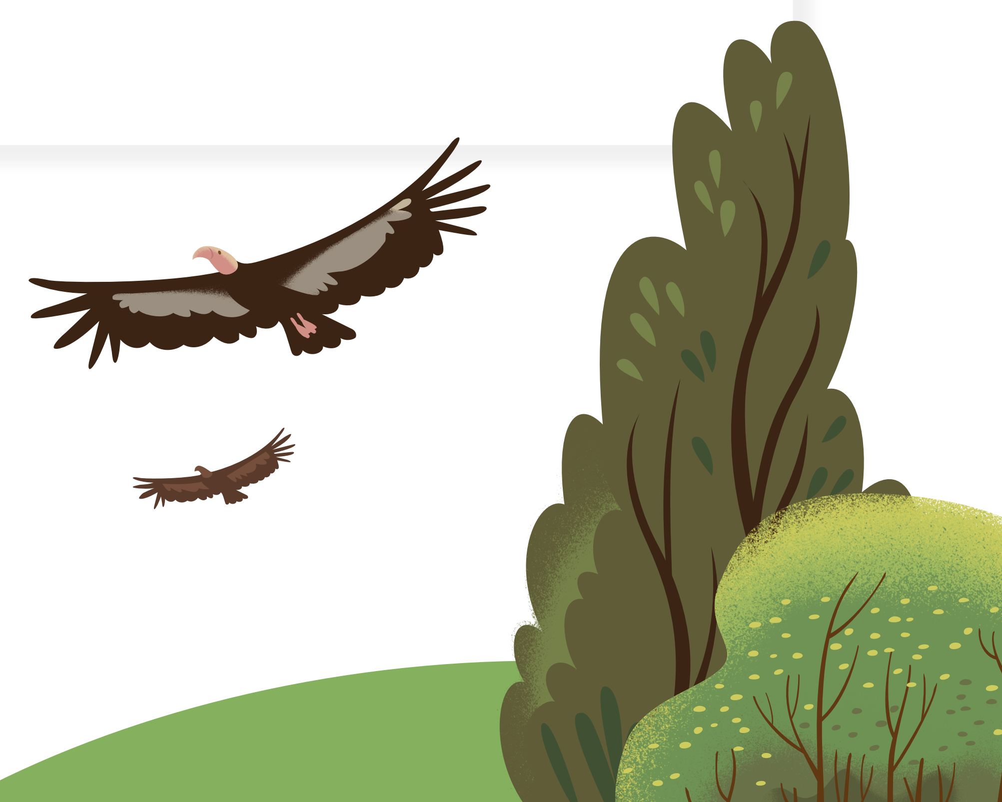
DIFFERENTIATORS Why is your solution better than alternatives? (Hint: Use SWOT above!)

EVIDENCE What is the proof that you'll deliver these outcomes? Use cases help develop trust.

STEP 3: Articulate Your Value Proposition to Partners

Put it all together:
For [target partner/partner] who [needs help with challenges you address], our solution [leads to outcomes]. Unlike [alternatives], our solution [describes benefits/why solution is best choice] because [reasons to believe].

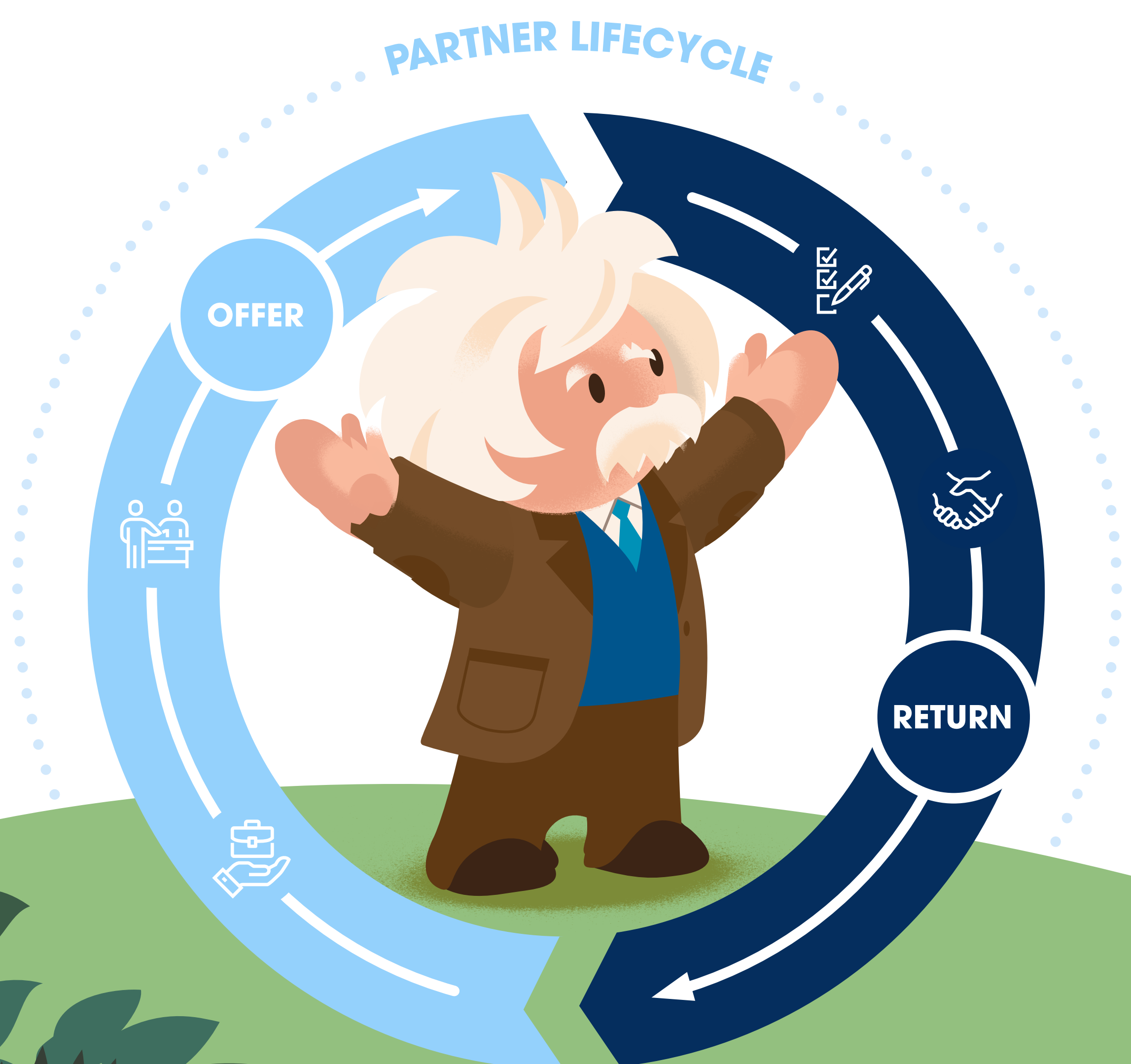
In just a few words, how do you want your program to be known by partners?
e.g., collaborative, simple, lucrative



Channel Program Elements

What it is:

Once you've laid out your overarching value proposition, get even more specific about what you can offer your partners (what they ***get***) and what you expect in return (what they ***give***). For easy organization, map along the partner lifecycle.



Why it matters:

Establishing the details of your partner program is important – but don't mistake completeness for complexity. The goal is to make your program simple, clear, and easy to understand. Being upfront about expectations can mean the difference between a successful partner program and an unsuccessful one.

Tips and must-knows:

- Be realistic about your commitment of resources: people, finance, training and certification, and support for partners.
- Don't forget to jot down what success looks like at each one of these stages in the partner lifecycle. What metrics or measures do you care about?
- In the spirit of "give more, get more," consider building out partner tiers. A tiered program incentivizes partner loyalty, engagement, and sales in exchange for benefits like discounted pricing or access to more dedicated support.
- Regularly assess partners' progress toward these requirements in quarterly business reviews and joint account plans.

	Partners Give (Requirements):	Partners Get (Benefits):
Onboarding & Ongoing Education Measure of success:	1. 2. 3.	1. 2. 3.
Marketing Measure of success:	1. 2. 3.	1. 2. 3.
Sales Measure of success:	1. 2. 3.	1. 2. 3.
Support Measure of success:	1. 2. 3.	1. 2. 3.
Support Measure of success:	1. 2. 3.	1. 2. 3.

Channel Partner Persona Deep Dive

What it is:

Gain an in-depth understanding of the personas engaging with your channel program, including their needs, aspirations, habits, and challenges.

Why it matters:

To effectively design your partner program and/or the technology supporting it, you first have to know who you're designing *for*. Building out personas helps you develop a sense of empathy for your partners, and also informs your strategy to ensure you're serving their needs.

Tips and must-knows:

Consider building out multiple personas. For example, a partner sales rep accessing your partner portal will have different needs from a marketer or an executive.

The best way to build out a persona? Gather information from real people! Surveys, interviews, focus groups, or ride-alongs are all great research techniques. Even informal conversations can yield helpful insights.

PERSONA

[What role/persona you're profiling]
- 2–3 sentence summary description
- Common title and position on org chart

Functional Attributes

DAY IN THE LIFE

[What activities am I doing during a typical day?]

STAKEHOLDERS

[With whom do I interact? To whom am I responsible?]

PSYCHOGRAPHICS

[Attitudes, aspirations, and other psychological criteria?]

DEMOGRAPHICS

[Any common characteristics, including tenure in role?]

STAKEHOLDERS

[With whom do I interact? To whom am I responsible?]

SKILLS REQUIRED

[What do I need to do in this role?]

Emotive Attributes

INITIATIVES

[What are my top priorities?]

CHALLENGES/PAIN POINTS

[What are the obstacles that get in my way?]

GOALS

[What is my measure of success?]

MOTIVATIONS

[What type of reward or recognition motivates me?]

Behavioral Attributes

LEARNING

[How do I learn, and on what channels?]

COMMUNICATION

[How do I prefer to consume and share information?]

DECISION-MAKING

[What elements factor into my decision-making process?]

WATERING HOLES

[Where do I connect with others and stay informed on industry trends?]

Partner Portal Strategy

What it is:

Many companies create a web-based portal for their partners to easily access tools, resources, and sales data. Outline your portal use cases and prioritize them based on what's most important and feasible.

Why it matters:

Partner portals can significantly improve channel visibility and efficiency – and on top of that, they can improve partner experience, engagement, and success. Like any other product you'd build, a portal requires thoughtful planning and maintaining. Developing a portal strategy, roadmap, and go-to-market plan helps you maximize impact.

Tips and must-knows:

First, brainstorm the role your partner portal will play by reflecting on areas of opportunity in your program (Step 1). From there, generate a high-level characterization of portal use cases (Step 2), and map them out to help you prioritize (Step 3).

Crawl, walk, run! Roadmaps require tradeoffs, so as you scale, do one thing at a time and focus on doing it right.

Priorities may change as your portal evolves, so revisit this exercise as needed.

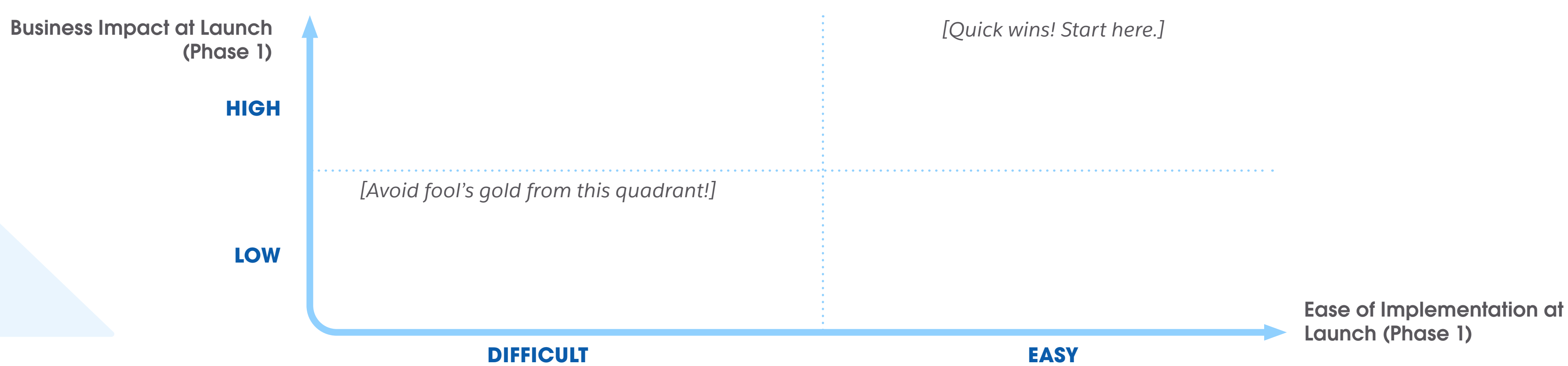
STEP 1: Brainstorm the Role Your Partner Portal Will Play

Consider these prompts:	Reflect on your current state:	Vision for your ideal state/ how your partner portal could help:
What processes do we routinely ask our partners to do? What stands out as being especially error-prone or manual?		
Where are we currently relying on email, spreadsheets, or phone calls?		
What does a new partner need as they are getting started?		
How does a partner access sales and marketing resources?		
Where does a partner turn for support if a question comes up?		
How do we prevent channel conflict?		
Where do we currently ask partners to switch between systems, and/or where is our own data disconnected?		
Where do partners repeatedly turn to channel account managers (CAMs), and is there an opportunity to improve self-service?		
How do we track partner performance? How do partners know the health of their own business?		

STEP 2: Define Use Cases for Your Partner Portal

Use Case Name	Description	Executive Sponsor	Impact (Low/Medium/High)	Ability to Implement (Low/Medium/High)	How to Measure in Portal
E.g., Partner onboarding	*Guide partners through a trackable sequence of onboarding activities to get them set up and bring them up to speed on our solution.*	*Susan Smith*	*High*	*High*	• *Guide partners through a trackable sequence of onboarding activities to get them set up and bring them up to speed on our solution.* • *% onboarding completion* • *average time of onboarding completion* • *# of questions deflected*
E.g., Deal registration					
E.g., Leaderboards/ Gamification					
E.g., MDF					

STEP 3: Map Out Use Cases to Prioritize



Next steps:

Thank you for accessing the Channel Sales Guided Workbook. We're happy to help as you develop your channel sales strategy. If you're ready to take the next step or would like to learn more, please schedule time to discuss channel sales for partners or a Sales Cloud Partner Relationship Management (PRM) time to discuss Partner Relationship Management solution.

- Trailhead: Channel Management and Partner Portal Strategy
- Trailhead: Channel Sales for Partners
- Trailhead: Partner Relationship Management with Sales Cloud PRM
- Salesforce for Indirect Sales Demo