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Deal and Opportunity Registration

~ PRACTICAL REAL WORLD TIPS ~

Over the last few years, deal registration programs have evolved from simple mechanisms for providing additional margins to partners to closed loop systems that are designed to influence partner behavior that impacts key business objectives. Also, deal registration programs that were targeted primarily where the price point was high and the sales cycle was complex are now increasingly aimed at products that have lower price points and shorter sales cycles. In response to the changing landscape of channel programs, many companies have re-thought and re-launched their deal and opportunity management initiatives. This article summarizes the key lessons learned and offers practical tips to deal with the challenges, both internal and external, in deploying successful deal registration systems.

WHAT WORKS

> Keeping things simple
> Developing internal consensus before deployment
> Deploying quickly with a well researched core feature set
> Leveraging system and human resources to create and deliver sustainable benefits
> Educating and communicating program benefits
> Solving conflict quickly

WHAT DOES NOT WORK

> Confusing program guidelines
> Data gathering creep
> Lack of communication

KEEP THINGS SIMPLE

Keeping things simple is the single most important ingredient for success. Simplicity and ease of use should be a bedrock design and implementation principle. It should guide day-to-day decisions on how to approach and whether to implement requested enhancements and additional features. Pay particular attention to the ease of use and simplicity factor of the system from the partners' point of view. How long does it take to register a deal? Is the information you are asking for used for a critical purpose or is it just convenient to have?

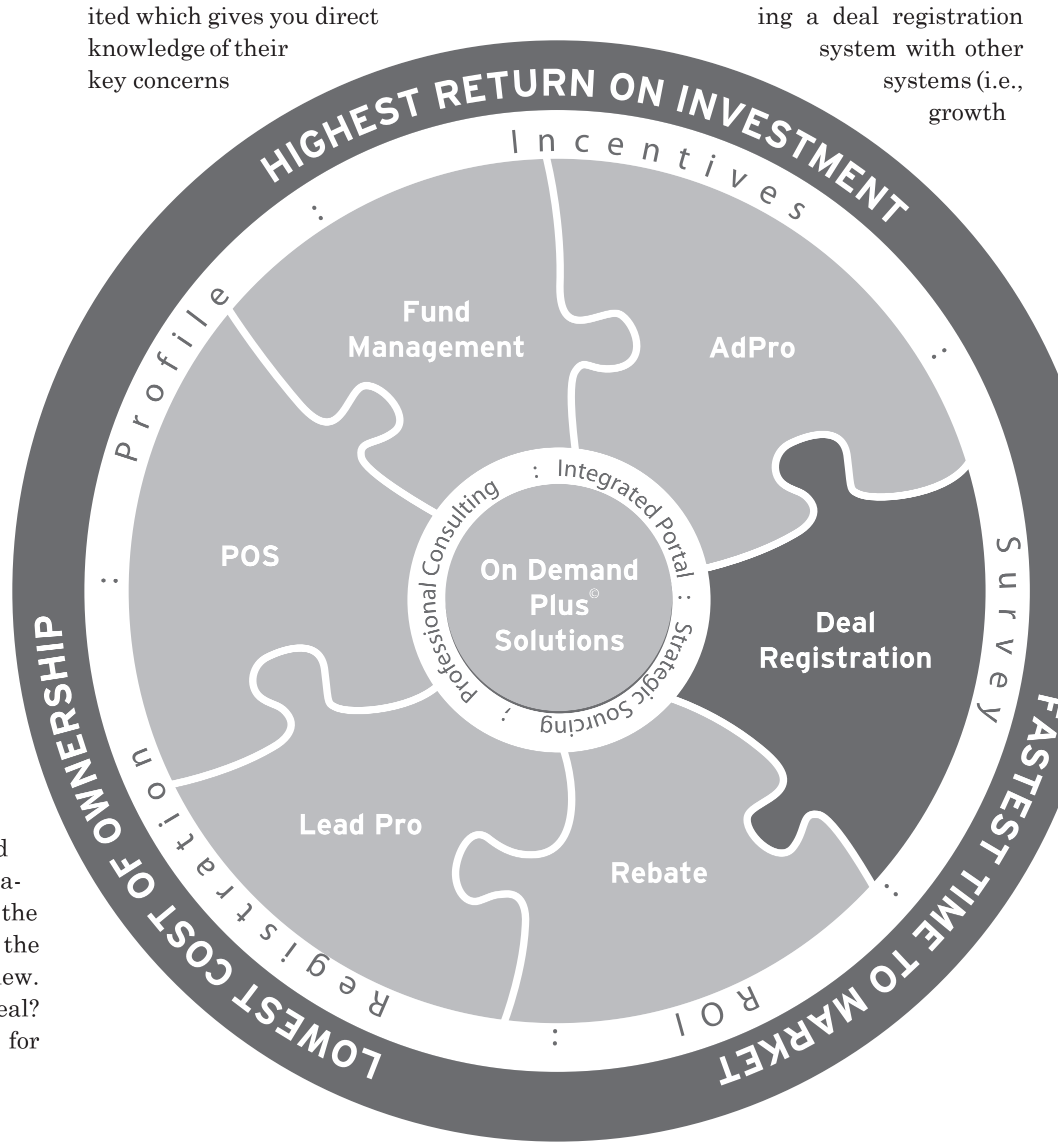
Also, create easy to understand program guidelines, terms and conditions, and rules of engagement. This should include clear criteria on what constitutes a legitimate deal and your definition of each stage of the sales cycle. Programs that are easy to understand are also simple to manage and track, and result in higher participation rates.

DEVELOP INTERNAL CONSENSUS PRIOR TO DEPLOYMENT

The objective and goals of the deal and opportunity management system should be clear and measurable, with all internal stakeholders in agreement. Consensus with key stakeholders is an important pre-requisite for success as is setting realistic expectations. Also, it is important that partner input is solicited which gives you direct knowledge of their key concerns and perceived benefits — a mutually beneficial business objective must be established before any other work on the program starts.

DEPLOY QUICKLY WITH A WELL-RESEARCHED CORE FEATURE SET

Once an objective has been established and ideas and approaches have been validated, a strategy that allows for quick deployment and delivers immediate benefits should be developed. The strategy should map back to the objective and act as a roadmap for future program development. For instance, it may be most prudent to deploy the deal registration application for one division or region, obtain real world feedback, make modifications and then deploy to other divisions and regions. Also, it might be advisable to develop an initial program in which only top tier partners participate. You may even decide that integrating a deal registration system with other systems (i.e., growth incentive rebates and co-op program management) will increase the likelihood of partner adoption and utilization. Start with a well bounded definition of system capabilities, set reasonable expectations and over deliver.



LEVERAGE SYSTEM AND HUMAN RESOURCES TO CREATE AND DELIVER SUSTAINABLE BENEFITS

Allocate adequate resources to serve partners and resolve issues. It is not reasonable to expect the system software to do everything or almost everything. Client or partner support teams working in tandem with a robust deal registration tool can best serve the strategic and tactical interests of the company and partner. This approach also provides valuable feedback in defining improvements and enhancements to the application. Don't try to manage it all in-house. As with most channel and trade promotion programs, the total costs of developing, implementing, executing and managing a program oneself can be prohibitive. Outsourcing to experienced and reliable experts can mitigate risk, reduce the total cost of the program, and produce highly favorable results.

EDUCATION AND COMMUNICATION

Communicating, educating and training channel partners and internal constituents on the nuts and bolts of the program and also on why the program was conceived is a critical step in both the development and ongoing management of any channel program. In the case of new or additional programs these steps are even more important in an attempt to overcome skepticism and distrust and to create opportunities for learning and retaining important information.

RESOLVE CONFLICT QUICKLY

Assure confidentiality and a "no conflict" policy by including territorial restrictions and non-compete clauses, and by providing view-only access to registered deals, as applicable. For instance, if you have a direct sales force that can compete with as well as collaborate with partners, it may be advisable

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The way I see it…

Bill Kelly is EVP for CCI and helps companies define objectives, evaluate strategies and implement programs that achieve measurable results

Partner Engagement Portals

Marketing portals provide an effective mechanism to optimize interaction with partners. They are also a key way to differentiate and positively position your company. Well-designed Partner Engagement Portals ensure partners receive and perceive benefits that go above and beyond the operational support they get from most portals. Companies require and insist that partners submit a variety of data on a timely basis. Over time this reporting and data submission requirement is viewed as onerous and one sided with partners perceiving little or no benefit from the information they submit to the manufacturer. A Partner Engagement Portal can address this situation by making key performance benchmarks and metrics available on a timely basis – in addition to the operational information partners require to work with their suppliers. The CCI Client Engagement Portal is a central entry point for all CCI applications as well as other pertinent client Web sites. In addition to providing centralized access, the portal also offers "dashboard" type capabilities that are configured for each client based on their system permissions.

The CCI Partner Engagement Portal provides two key functional areas

- A menu bar that takes the user into the native CCI applications that they are subscribed to: Fund Management, AdPro, POS etc.
- A second menu bar that gives partners key "dashboard" information on each of the application areas that they want. For example, the Fund Management tab would give partners a choice to click on different product groups and get pertinent information by product group.

In addition, "home" tab presents an aggregation of the customized information from all applications that partners are currently utilizing.

Partner engagement portals are

USER-FRIENDLY
A well-researched interface makes it easy for users to manage all aspects of their projects. Site wizards, help icons, and an intuitive user interface enable universal ease-of-operation.

SECURE AND PROTECT CONTENT
Allow for definition and assignment of roles for different user groups and geos that mirror CCI security and access level permissions.

CONSTANTLY EVOLVING THROUGH REAL WORLD TRIAL
Capability to evolve the software at a rapid pace. End-user suggestions should result in quick improvements and enhancements to the portal.

FULLY CONFIGURABLE - MODULES AND CLIENT SPECIFIC REPORTS AND GRAPHICS
These might include relevant CCI user reports, key performance indicators (KPI's), chat applications, contact managers, events calendars etc. Changes can be made to portals at all levels – from basic style-sheet elements like font type, color, and bullet points, to overall site appearance. New skins and module containers can be easily applied to the site with no repercussion on content.

END-USER MANAGEABLE
This tool should allow administrators the ability to upload files directly from their computer to their portal. Any uploaded file becomes instantly available to be used on the portal or listed in a section that handles documents or file downloads.

FULLY LOCALIZED
Support multiple languages.

EASY TO SET-UP AND CONFIGURE
Built on up-to-date Microsoft ASP.NET technology.

For more information on best practices around partner engagement, please call us at 888.260.2667.

What's New @ CCI

CCI SPONSORS CHANNEL FOCUS NORTH AMERICA

Now in its tenth year, Channel Focus North America is the conference that defines the strategies and tactics that leading vendors and clients use to grow their businesses. The conference has earned a reputation for presenting the finest speakers who share how they use proven strategies to successfully open up new and re-define existing channels.

The 2007 Channel Focus North America Conference will be held in La Jolla on April 24th and 25th. CCI is a sponsor of this annual event, and Bill Kelly, CCI's Executive Vice President, will be presenting a session titled, "Deal Registration Management – Version 2"

Visit www.baptie.com for conference and registration details.

Deal Registration

CONTINUED FROM A1, COLUMN 4

to require direct salespeople to register specific types of deals, change their commission structure, or limit their approval and view access into registered deals.

WHAT DOES NOT WORK

We have focused in detail on some of the critical success factors in developing and deploying the next generation of deal registration systems. The key reasons systems either fail quickly or die a slow death can be attributed to confusing program guidelines, data gathering creep, lack of communication, and non-enforcement of the rules and guidelines.

The new generation of deal and opportunity management systems delivers a rich set of business benefits to companies that have mastered the full scope of deployment and maintenance challenges. For more information on best practices around channel programs or to find out more about CCI's Deal Registration Application, please visit www.CCIonline.biz or call us at 888.260.2667.