

THE CHANNEL CATAclysm

The Failure of Template-Driven Partnership JBPs & QBRs

JBP / QBR Template Cliff Disaster:

PPT, Word, and Excel-based templates never work for effective partnership business plans




SUCCESSFUL
CHANNELS

The QBR
Company



THE CHANNEL CATAclysm

The Failure of Template-Driven Partnership JBPs & QBRs

JBP / QBR Template Trainwreck:

Template-based JBPs and QBRs are a trainwreck waiting to happen because they are disconnected, fragmented, and not scalable



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THE CHANNEL CATAclysm

The Failure of Template-Driven Partnership JBPs & QBRs

JBP / QBR Templates Belong in the Trash Bin:

Template-based JBPs and QBRs are a huge waste of time for channel managers and partners



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THE CHANNEL CATAclysm

The Failure of Template-Driven Partnership JBPs & QBRs

JBP / QBR Templates are Bad:

It is time to get away from desktop tools for managing global channels. Use automated, and guided tools for generating meaningful growth



BAD

Templates=



Too hard and not scalable or effective



The QBR
Company



GOOD

Automated, Integrated, and Guided
JBPs and QBRs Generate More
Partner-Led Revenue Growth and
Happier Channel Managers & Partners

A) Why Templates Fail: Current Standard for JBPs/QBRs

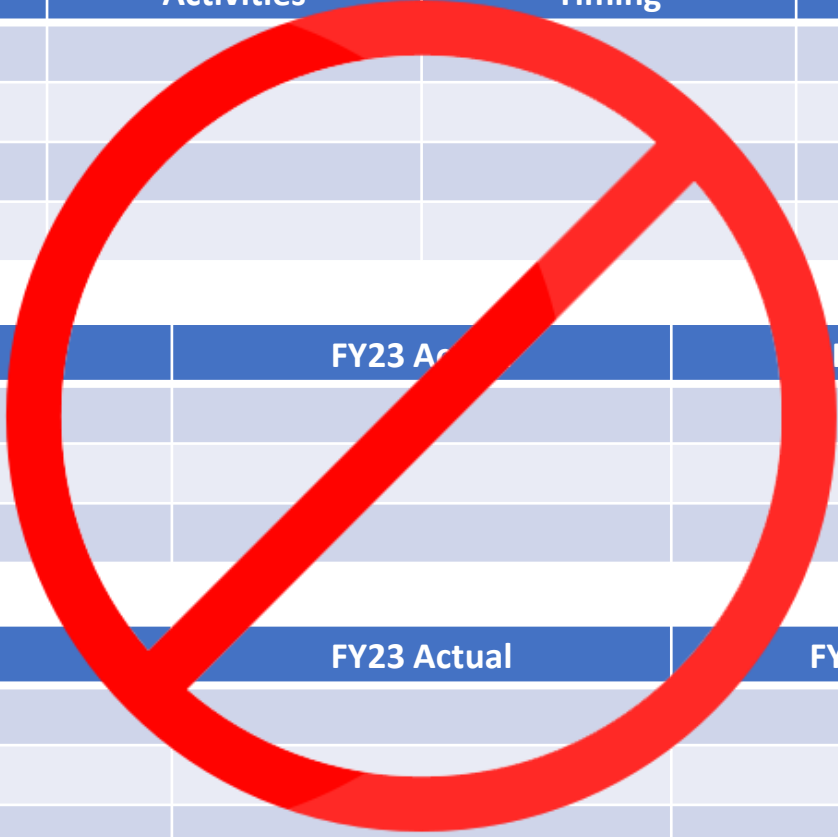
JBP = Joint Business Plans

MBR / QBR = (Monthly) Quarterly Business Reviews



Why Template JBPs & QBRs Fail

- Blank templates don't guide channel team or partners
- Not auto-populated w/ best practices
- Actual data not auto integrated
- Not guided with proven strategies
- Manual QBRs are too labor-intensive
- Result: completed for less than 10% of partners



Objectives	Activities	Timing	Owner
Goals	FY23 Actual	FY24 Target	
Budgets	FY23 Actual	FY24 Requests	

A) Why Templates Fail:

Channel Sales Still Utilizes Desktop Templates Vs. Adopt Productivity & Effectiveness Work-Flow Software

Operations

- Asset Management
- Task Management
- Collaboration
- File Management
- ERP
- Lifecycle Management
- Risk Management
- Inventory Management

Accounting

- Invoicing / billing
- Payroll
- Corporate accounting
- Forensic accounting
- Expense management
- Income & equity management

Direct Sales

- CRM
- Campaign management
- Referral management
- Lead management
- Proposal builders
- Pipeline management
- Contact management
- Account Planning
- Customer Experience Management
- Sales Intelligence
- Sales cycle management
- Sales productivity management
- Sales enablement
- Customer success management
- CPQ
- Sales Training

Channel Operations

- PRM
- LMS
- Incentive management
- MDF Management
- Rebate Management
- Channel data management
- TPMA
- Partner Finder

Channel Sales

(Last to Adopt Automation)



Partner Business Plans



Partner Scorecards



Partner Profiles



Partner Task / Action Plan Managers



MBRs / QBRs



**Automated JBP
& QBR Tools**

First Poll

What Factors Limit your Organization from Implementing Channel Sales Enablement Technology? *(Select all That Apply)*

- ☐ **Desktop Legacy:** A strong history of the use of desktop (Excel, PPT) to manage channel sales processes
- ☐ **Lack of IT Support:** Not enough IT resources to enable a fully-supported channel sales function
- ☐ **Data Quality Issues:** Data quality issues are taking a higher priority than new channel sales systems
- ☐ **Disconnected Systems:** Channel sales-related systems are disconnected making new technology even more difficult to implement
- ☐ **Not a Business Priority:** Implementation of new channel sales systems is not a business priority
- ☐ **Channel Operations Limitations:** Channel operations staffing and resources limit ability to implement new systems
- ☐ **None of the above**

A) Why Templates Fail:

How to Transform Partnership Management - Introduction of Automated JBPs & QBRs

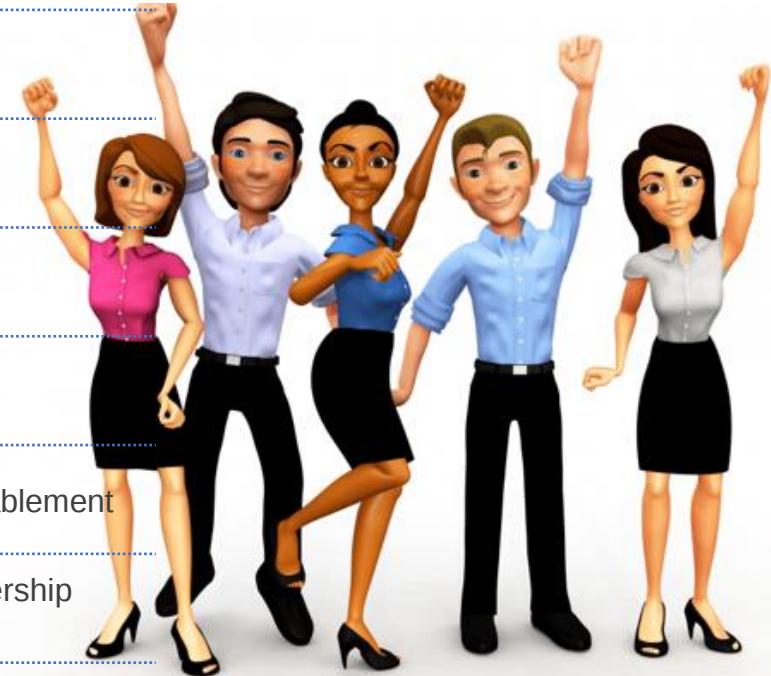
#	Masterclass Table of Contents	Summary Topic for Each Section
A	Why Templates Fail	Not guided, not scalable, not integrated, not QBR-able
B	How Channels Succeed	Simple-to-use, guided, best practices. Automated, integrated, scalable, reportable, and MBR / QBR-able
C	Why JBPs & QBRs Are a Must	Hub-of-the-wheel of partnering, build commitments, capabilities, and partner-led revenue
D	Automated JBPs & QBRs	Makes the impossible across many partners possible, efficient, and effective
E	Simple, Modest, Medium JBP/QBR Options	How to Achieve High Channel Manager and Partner adoption rates for all partner sizes / levels
F	How Long to Implement	Deployed for a brand in 30-60 days and 1-2 hours per partner and one-click MBR / QBRs
G	JBP / QBR Integration	Integrates with SFDC, PRM and other channel systems seamlessly (SSO, UI, and Data integration)
H	Why JBPs & QBRs in 2023	2023 Survey Results: The #1 priority for Sr. Channel Sales Executives
I	Q&A w Successful Channels	Discuss all attendee questions and comments on JBPs and QBRs

B) How Channels Succeed:

Automated JBP & QBR Tools to Drive Partner-Led Revenue

A Blueprint for Channel Team Enablement and Success

Provide Guidance	Assist with all phases of a best practice partner management process
Improve Professionalism	Enable channel team to deliver professional partnership management
Eliminate Administrative Work	Remove low value administrative work with automated data integration
Deliver Pre-Populated Reports	Pre-build partnership plans and blueprints with best practice planning inputs
Help Build Partner Commitments	Define plans that will generate committed partners investing in growth
Help Build Partner Capabilities	Build partnerships that are strong brand representatives
Help Execute Tasks	Coordinate many task areas for sales, marketing, service, and technical enablement
Drive Partner-Led Revenue	Execute consistent MBRs / QBRS to track and manage all aspects of partnership development



B) How Channels Succeed:

The 12 Attributes of Channel Executive Success

The 12 Pursuits of Highly Successful Channel Executives



1. Increase Partner-Led Revenue



2. Build Partner Commitment Levels



3. Improve Partner Capabilities



4. Improve Deal Registration Rates



5. Increase Deal Close Rates



6. Gain a Disproportionate Share of Partner's Time



7. Improve ROI on Channel Marketing



8. Improve Incentive Participation Rates



9. Consistent Partner Life-Stage Mgmt.



10. Improve CAM Productivity



11. Provide Quarterly Business Reviews



12. Comprehensive Performance Reports

[The 12 Pursuits of Highly Successful Channel Executives](#)

Second Poll

What Are The Top Priorities of Your Channel Sales Team? *(Select all That Apply)*

- ☐ Grow partner led revenue
- ☐ Build partner commitments
- ☐ Improve partner capabilities
- ☐ Improve partner deal registration rates
- ☐ Increase partner deal close rates
- ☐ Improve channel marketing ROI
- ☐ Consistent partner life-stage management
- ☐ Improve Channel Manager productivity
- ☐ Improve MBRs and QBRs
- ☐ None of the above

C) Why JBPs & QBRs are a Must:

Is There a Business Size that Requires or Would Benefit From JBPs & QBRs?

Best Fit Channels for JBPs & QBRs

Channel Attributes	Why JBPs and QBRs are Highly Valued
Channel Manager-Led Partner Management	Complex partnership management
Product is a Complex Sale	Sophisticated business model supported by JBPs
Products that require partner investment	Organize partner investments with confidence
Products that require partner enablement	Plan partner enablement and track progress
Products that require deal registration	Support and track pipeline progress
Partnerships that require a “business relationship”	JBPs and QBRs facilitate a professional partnership

Worst Fit Channels for JBPs & QBRs

Channel Attributes	Why JBPs and QBRs not Valued
Lesser Channel Manager Role	Simple ad hoc partner management is sufficient
Price-Driven Product	Price quoting (not plans) are most important partner management task (e.g., commodity segments)
Run-Rate / Transactional Products	Little value-add in partnerships
Partnerships that require only a simple vendor invoice relationship	Partnership does not require much business management

C) Why JBPs & QBRs are a Must:

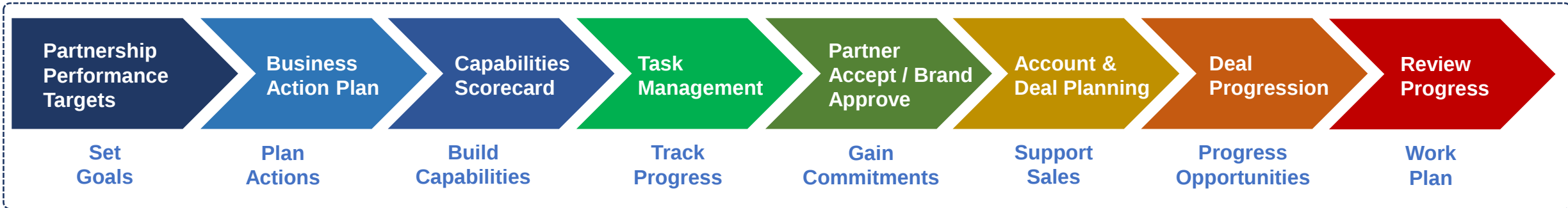
Do I Need to Do Formal, Automated Partnership JPBs and QBRs?

Select Your 2023 Channel Goals – See How JBPs & QBRs Enable Achievement

Yes	Channel Business Goals	How JBPs and QBRs Achieve These Goals
☐	Drive more partner-led revenue	Sets formalized targets and organized regular reviews for performance-to-plan
☐	Build strong brand representatives in market	Enables partner staff to provide competent deliver of brand-defined support
☐	Leverage partner relationships for growth	Access customers direct team does not access
☐	Grow without adding as much internal staff	Leverage partner staff investments
☐	Improve ROI on channel-invested funds	Plan, allocate and measure investment ROI
☐	Improve visibility of channel growth opportunities	Report on performance, capabilities, task completion and revenue delivery
☐	Extend product usage with partner-delivered end-customer services	Leverage partners desire to build value-added services around your brand
☐	Train and enable a more professional channel management staff	Guide channel team with a more professional partner management process

D) Automated JBPs & QBRs:

Tools that Support a Best Practice Partner-Management Process – with Ease



Automatic	Guided	Professional	Comprehensive	Accountable	Simple	Valued	Instant
- Metrics: Key performance metrics to manage partnerships - Data: Auto-populated with date for instant reporting	- Objectives & Activities: Guided process to select goals and strategies - Replicated: Business plans can be replicated year-to-year, partner-to-partner	- Scorecards: Stoplight scorecard assessment in minutes - Action Plans: Create partner action plans to turn reds into yellow and green scores	- Define Tasks: Stoplight scorecard assessment in minutes - Notifications: Select task owners, send notifications & reminders - Manage Status: Track and report on action plan progress	- Prepare Plan: Create first draft plan for partner - Partners Accept: Review plan with partners to accept - Channel Team Approves: Accepted plans are reviewed and approved by channel leaders	- Opportunity Management: Sort and managed active pipeline - Account Planning: Review top 10 accounts	- Marketing: Create marketing plans - MDR: Request and approve marketing funds - Lead Management: Review lead status	- MBRs: Generate one-click performance and task reviews - QBRs: Generate one-click comprehensive business reviews

D) Automated JPBs & QBRs:

Business Case for Automated JPBs and QBRs

March 28th, 2023:



View All QBR Masterclass Recordings @
<https://successfulchannels.com/qbr-webinar/>



Successful Channels Clients shared the business case impacts of their automated JBP and QBR System Implementation

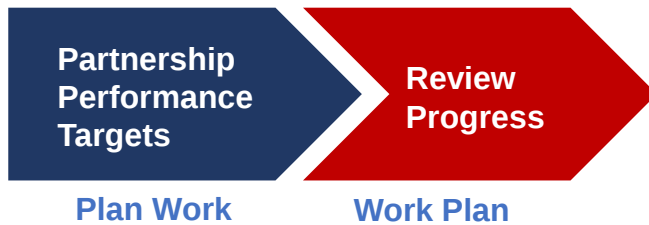
- **Committed Partners:** Partners organize team and resources to achieve program targets
- **Capable Partners:** Partner capabilities assessed, scored and action plans to develop stronger partner brand representatives
- **Supporting Action Plans:** Detailed action plans organized to support achievement of partner targets
- **Partner Task Completion:** Track tracking, reporting, and notifications enables greater completion rates
- **More Partner-Led Revenue:** Partners with JPBs and QBRs generate 10-35%+ growth Vs those that do not

E) Simple, Modest, & Medium JBP/QBR Options:

3-Levels of Partner Joint Partner Business Plan and QBR Processes



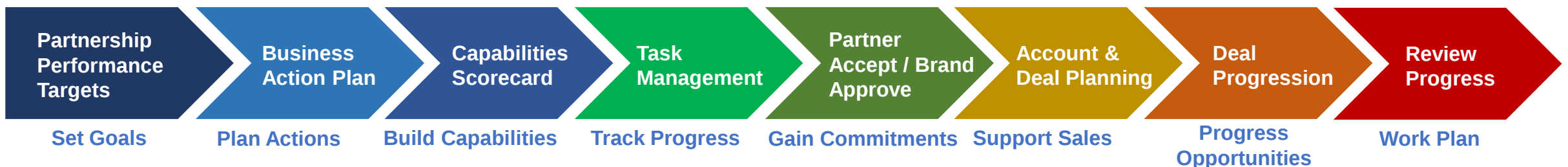
Level 1: Set Targets & Track Perf. Plans (Plan & Track For all Partners) (Easy Effort)



Level 2: Sales Development Plans and Reviews (Sales & Opp.-Focus For Many Partners) (Modest Effort)



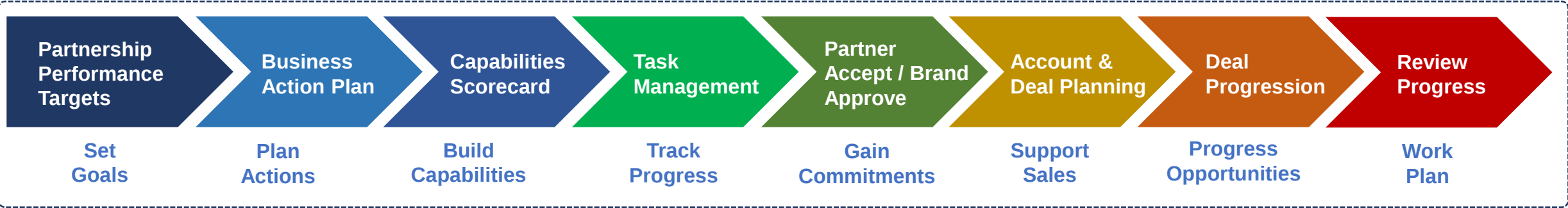
Level 3: Comprehensive Business Plans and Reviews (Sales, Marketing, Tech., & Services, For Top Partners) (Medium Effort)



E) Simple, Modest, & Medium JBP/QBR Options:

Less than 60 Minutes to Build an Annual Plan with each Partner

Time to Build Initial Plans with Each Partner



60-90 Min. Plan & Instant QBR

Why Channel Team Members and Partner Executives Love these JBP / QBR Tools

Ready to Use: (Instant) ▪ Easy to set targets ▪ Pre-build sales metrics ▪ Auto Populated ▪ One-Click PPT Export	Best Practices Integrated: (20 Min) ▪ Suggested plan values ▪ Guided process ▪ Created in minutes	Partner and CAM Friendly: (15 min) ▪ Guided assessment ▪ Partner life-stage scorecard ▪ 4 step easy-to-use action planner	All Tasks Consolidated: (Instant) ▪ Business tasks ▪ Capabilities tasks ▪ Marketing tasks ▪ Notify, manage and sort for higher completion	One-Click DocuSign: (3 Min) ▪ Partner's accept plan ▪ Channel team approves plan ▪ Instant rollup and tracking reports	Plan Integration of Deals: (Instant) ▪ View and sort all active deals ▪ Rank top 10 deals, customers, verticals, markets	Plan Integration of Deals: (30 Min) ▪ Create Marketing Plans ▪ Request Funds ▪ View Acceptance / Approval	One-Click MBR / QBR (Instant) ▪ Instant PDF (Portrait) MBR / QBR ▪ Instant PPT (Landscape) MBR / QBR ▪ Configurable formats and modules
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Note: Select only those planning modules that align with your channel's business priorities

E) Simple, Modest, & Medium JBP/QBR Options:

One-Click MBR / QBR PPT (Landscape) or PDF (Portrait) Available Anytime



One-Click MBR / QBR System: *Export, share, refine and update in 30- Minutes)*



- Review Task Status and Update: (10-min) Update task status for all channel manager-assigned tasks
- Export MBR Template and Share with Partner: (Instant) Export and send via email
- Review Perf & Task Status: (30-min) meeting and update
- Update Status, Save and Export: (10-Min) Based on partner meeting, update task status, save, export and share w Partner

E) Simple, Modest, & Medium JBP/QBR Options:

Select, by Partner, Which JBP & MBR / QBR Elements are Needed



Third Poll

What are the factors that prevent your channel managers to build JBPs and execute QBRs with their partners? *(Select all That Apply)*

- ☐ Too labor-intensive with existing processes in place
- ☐ Lack of real-time data integrated into the MBR / QBR system
- ☐ An ad hoc business process for managing partner business planning
- ☐ Too many partners to manage to execute JBPs
- ☐ Lack of systems to support MBRs and QBRs
- ☐ Lack of channel manager training to effectively manage a JBP and QBR process
- ☐ Not a priority for the channel sales team
- ☐ None of the above

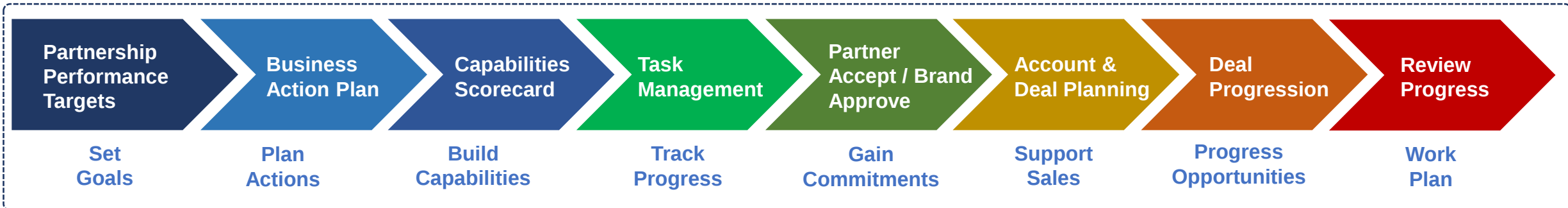
E) Simple, Modest, & Medium JBP/QBR Options:

Options for Building JBPs & QBRs for your Channel Organization

	Desktop Tools	Analytics Applications	Direct Sales Acct. Planning Tools	CRM	PRM	Purpose-Built JBP/QBR Channel Mgr. Tools
Examples	  	 	       	      	       	
Positives	- Flexible - Simple to design - No cost	- Data integrated - Dashboard-focused	- Maybe already purchased by company - Some forecasting capabilities	- Dashboard & Metric driven - Some data elements updated	- Template-based planning elements - Some dashboard elements	- Guided - Data-integrated - Best practices - Completed in minutes - One-click exports
Negatives	- Very hard to create JBPs & QBRs - Partners don't like - Channel team does not like	- Only 20-25% of plan - Requires analytics expert to create	- Not designed for JBPs & QBRs - Less than 25% of required JBP / QBR elements	- Require lots of configuration - Less than 25% of required JBP / QBR elements	- JBP / QBR "Light" - Not guided - Limited functionality	None
Adoption Rates for JBPs & QBRs						

E) Simple, Modest, & Medium JBP/QBR Options:

Built-in JBP / QBR Best Practices



Business Plan Metric Types: - Revenue targets - Pipeline targets - Certification targets - Marketing targets - Budgets - Account targets	Partner Growth Objectives: - New logos - Partner-Led Rev. - Vertical Focus - Alliance Focus - New services - Grow share - Use-case focus - Renewals	Enablement Types: - Onboarding - Sales enablement - Mktg. enablement - Tech enablement - Services enablement - Brand enablement - Cert. enablement - Renewal enablement - Vertical enablement - Use Case enable - Website enable	Three Types of Tasks: - Business Tasks - Capabilities Development Tasks - Marketing Tasks Manage Tasks - Assign tasks - Auto-notifications - Auto-reminders Track Status - Not-Started - In-Progress - Completed - Cancelled	Partner Mgmt. Process Channel Manager: - Channel Manager prepares plan and presents to partner - Refine together and partner accepts plan DocuSign Channel Mgr. Director: - Review plan with director - Director approves plan DocuSign	Opportunity Review - Review deals by close date - Review deals by registration date Account Review: - Review top accounts - Review top verticals - Review top product families - Develop account growth plans	Progression: - Collaborate on handling objections - Collaborate on pricing - Collaborate on proposals - Collaborate on close Demand Generation: - Define target audience - Develop offers - Execute campaigns - Capture MQLs and SQLs	MBR (Monthly Business Review): - Performance dashboard review - Task status review - Opportunities review QBR (Quarterly Business Review): - Performance dashboard review - Task status review - Opportunities review - Scorecard review - Bus plan review - Marketing plan review
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E) Simple, Modest, & Medium JBP/QBR Options

Level 1 (*Instant*): Set Targets & Track Perf. Plans (*Plan & Track For all Partners*)

Partnership Performance Targets

Plan Work

Choose from Hundreds of Pre-Configured Partner Metrics (Examples)

- Revenue Perf-to-Plan
- Pipeline by Close Perf-to-Plan
- Pipeline by Reg Perf-to-Plan
- Win Rate
- Cycle Time
- Reps Closing Deals
- Reps Selling Deals
- Rev TY Vs. LY
- Pipeline TY Vs. LY
- Partner Led Vs. Company Led
- Revenue by Partner type
- Top 10 Customers YTD
- Top 10 Verticals YTD
- Top 10 Products YTD
- Certifications achieved
- Specializations achieved
- Pipeline by sales stage
- Average \$ deal size
- # of deals by close date
- # of deals by reg date

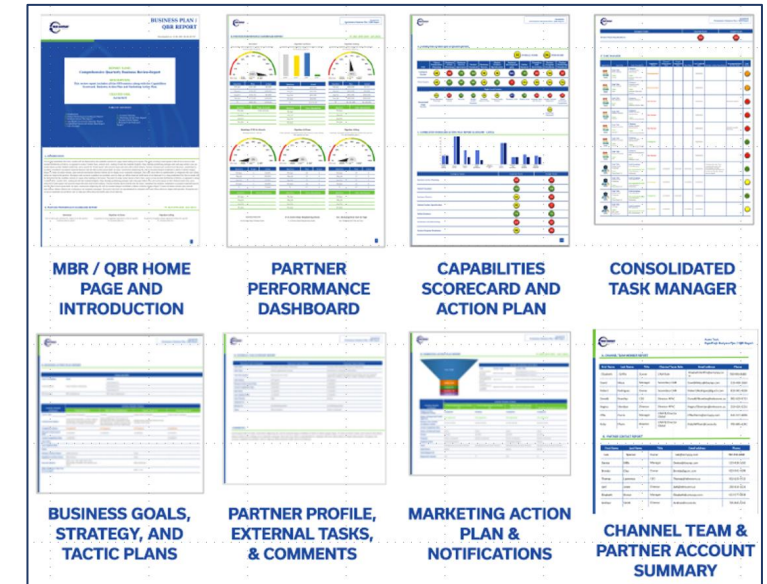
Example of a Partner Performance Dashboard Updated in Real Time



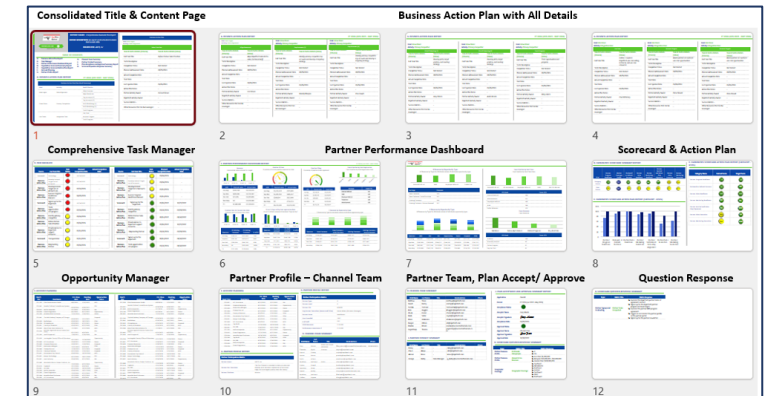
Review Progress

One-Click MBR / QBR

A. PDF Portrait Export



B. PPT Landscape Export



E) Simple, Modest, & Medium JBP/QBR Options

Level 2 (30-60 Minutes): Sales Development Plans and Reviews (Sales Focused Plans)

Partnership
Performance
Targets

Set Goals

Business
Action Plan

Plan Actions

Partner
Accept / Brand
Approve

Gain Commitments

Account &
Deal Planning

Support Sales

Review
Progress

Work Plan



Manage Goal, Activity and Task & Tactics

Recommend:

- Objectives
- Activities
- Tactics

Assign & Track Tasks:

In-Person Event, Direct Marketing Campaign

- ☐ Virtual Event
- ☒ In-Person Event
- ☒ Direct Marketing Campaign
- ☐ Industry Event

- Select task owner
- Send task notification
- Send reminder
- Personal Task URL
- Track task completion

A. Partner Accepts Plan

Period	Acceptance Status	Acceptance Date
FY(Jun 2022 - May 2023)		11/03/2022
Acceptor Name	Acceptor Signature	
Gary Morris		

B. Channel Approves Plan

Approval Status	Approver Name	Approver Signature	Approval Date
	George Bailey		04/19/2023

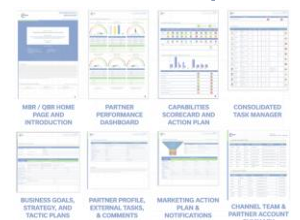
Opportunity Planning

1402 Open Opportunities • Sorted by Deal Registration Date

Deal Name	Deal ID#	Deal Registration Date	Estimated Close Date	Deal \$ Size
EW-Grand Saline Independen...	0062700001PqkQAB	04/18/2023	08/16/2023	\$15,986
EW-Greater Atlanta Christ...	0062700001PqkQAR	04/18/2023	09/15/2023	\$4,914
Johnstone WG - Est Antenn...	0062700001PqkQAR	04/18/2023	09/05/2023	\$156
Northrop Grumman - CDW - ...	0062700001PqkQAJ	04/18/2023	07/31/2023	\$0
CSS-GLACIERPOINT ENTERPRI...	0062700001PqkQAB	04/18/2023	04/23/2023	\$2,963
CSS-Acorn Distributors-CD...	0062700001PqkQAB	04/18/2023	04/18/2023	\$23
Reece Supply Company of D...	0062700001PqkQAR	04/18/2023	05/05/2023	\$473
City of Westland - CDW - ...	0062700001PqkQAR	04/18/2023	04/20/2023	\$60,764
CSS-Ruder Finn, Inc.-CDW...	0062700001PqkQAZ	04/18/2023	05/31/2023	\$2,149
Consumer Cellular - CDW - ...	0062700001PqkQAB	04/18/2023	04/26/2023	\$19,444
EW-Village of Lemont-CDW...	0062700001PqkQAR	04/17/2023	05/17/2023	\$712
Choate - AP305C/v - July	0062700001PqkQAB	04/17/2023	07/26/2023	\$69,023
LCPS - AP460C Mount	0062700001PqkQAB	04/17/2023	04/28/2023	\$18
EW-IQ MEDIA S-01602966 - ...	0062700001PqkQAB	04/17/2023	06/17/2023	\$35,406

Deal Name	Estimated Close Date
EW-Suncoast Credit Union ...	08/24/2023
Deal ID#	Deal \$ Size
0062700001PqkQAR	\$14,189
Deal Registration Date	Pipeline Level
04/17/2023	3: Making Decision

A. PDF Portrait Export



B. PPT Landscape Export



C. Real Time Online QBR



E) Simple, Modest, & Medium JBP/QBR Options

Level 3 (60-120 Minutes): Comprehensive Business Plans and Reviews (For Top Partners)

Partnership
Performance
Targets

Business
Action Plan

Capabilities
Scorecard

Task
Management

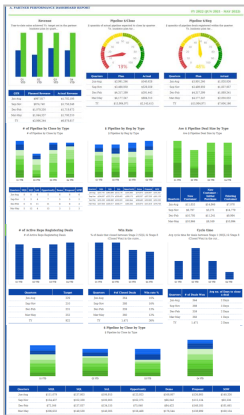
Partner
Accept / Brand
Approve

Account &
Deal Planning

Deal
Progression

Review
Progress

a. Perf. Dashboards



b. Business, Sales, Technical, & Services Action Plan

Plan Visualization and Status

Search by Task & Tactics Title

Goal	Activity	Task & Tactics
New Logos	Sales Alignment	Sales Priorities
		Align Resources
Grow Share	Primary Competitor	Top Accounts (1)
		Top Accounts (2)
		Pitch & Meeting (1)
		Pitch & Meeting (2)
Use Cases	Integration Case	Use Case
		Account Targets
		Track Progress

a. Life-Stage Scorecard

- Strong Performance
- Needs Improvement
- Priority Concern
- Non Scoring

Overall Score

75

Peer Score

44

b. Detailed Category & Topic Scores



Task Manager

- Not Started
- In Progress
- Completed
- Recommended

Task	Task Title	Task Status	Task Owner	Task Due Date
24 month partner business plan with goals, strategies, and action items by month by quarter	Not Started	Not Started		01/20/2023
Developing Alliance 3 Target List of Accounts	Not Started	Not Started		03/20/2023
Conduct Individual Account/Relationship work sessions (2)	Not Started	Not Started		01/20/2023
Launch & Learn	In Progress	In Progress		06/15/2023
Facilitate Targeted Relationship Development (on Campaign) (1)	In Progress	In Progress		06/20/2023
Transposition	In Progress	In Progress		02/20/2023
High Technology	In Progress	In Progress		03/20/2023
Direct Marketing Campaign	Completed	Completed		01/20/2023
Map Prospective Partner Accounts at Headquarters	Completed	Completed		06/20/2023
Track and update new family member identified opportunities	Completed	Completed		06/15/2023

a. Partner Accepts Plan

Period	Acceptance Status
FY(Jun 2022 - May 2023)	Strong Performance

Accepter Name	Accepter Signature
Gary Morris	Gary Morris

Acceptance Date
11/03/2022

b. Channel Approves Plan

Approval Status	Approver Name
Strong Performance	George Bailey

Approver Signature	Approval Date
George Bailey	04/19/2023

Opportunity Planning

Deal Name	Deal ID	Deal Registration Date	Estimated Close Date	Deal \$ Size	Pipeline Level
EW-Suncoast Credit Union ...	0062T00001PslrPQAR	04/17/2023	08/24/2023	\$14,189	3: Making Decision

Sample Deal

Deal Name
EW-Suncoast Credit Union ...
Deal ID#
0062T00001PslrPQAR
Deal Registration Date
04/17/2023
Estimated Close Date
08/24/2023
Deal \$ Size
\$14,189
Pipeline Level
3: Making Decision

Marketing Plan & MDF

A. Mktg. Plan Dashboard

Activity Type	Activity Description	Deal Name	Deal ID
Direct Marketing Campaign	Security and penetration testing solutions	Not Approved	Not Approved
Appointment Setting Campaign	Security and enhanced threat management	Approved	Approved
BANT Qualified Lead Campaign	Security and enhanced threat management	Not Approved	Not Approved
Start a Referral Program	Security and enhanced threat management	Not Approved	Not Approved
The Evolution Of Blockchain And Its Impact On Health Care	Security and enhanced threat management	Approved	Approved

B. Business Plan

Goal	Activity Type	Activity Title
Cross-Sell Security Solutions to existing customers	Direct Marketing Campaign	Security and penetration testing solutions
Grow Penetration in Healthcare	Appointment Setting Campaign	Security and enhanced threat management
	BANT Qualified Lead Campaign	Start a Referral Program
	Email Campaign	The Evolution Of Blockchain And Its Impact On Health Care

C. Select Funds & Programs

Activity Type

Activity Description

Deal Name

Deal ID

D. Build Forecast & Submit Request

Deal Name

Deal ID

Deal Registration Date

Estimated Close Date

Deal \$ Size

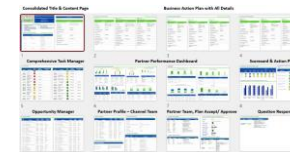
Pipeline Level

One-Click MBR / QBR

A. PDF Portrait Export



B. PPT Landscape Export



C. Real Time Online QBR



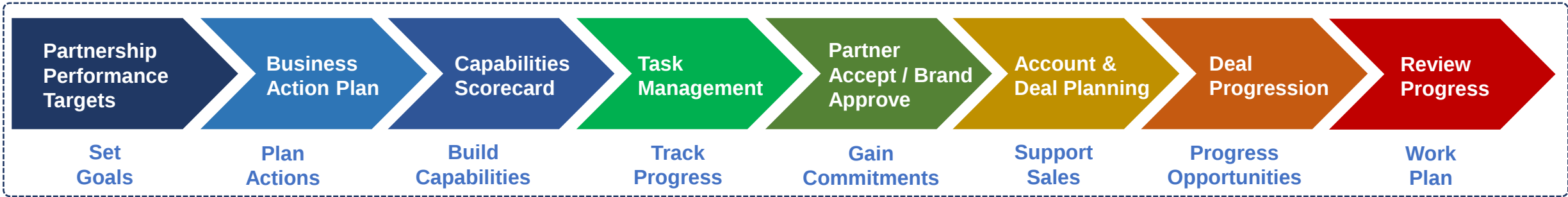
Fourth Poll

What are the reasons your organization is looking to improve your JBP and QBR Processes? *(Select all That Apply)*

- ☐ To build a partner commitment development process
- ☐ To enable a more professional partner management process
- ☐ To help enable a more professional partner management process
- ☐ To provide a more systematic way for managing partners
- ☐ Measure partner performance
- ☐ To provide a way to rollup partner performance
- ☐ To track partner progress
- ☐ None of the above

F) How Long to Implement:

How Planning System Setup in Less than 30 Days



Hosted Work-Session: (Best Practices)

- Pre-configured partnership dashboard
- Select from set metrics
- Sync or upload data
- Configured by second work-session

Hosted Work-Session: (Best Practices)

- Best practice partner objectives, w linked activities and tactics
- Best practice partner onboarding, sales, marketing, services, renewal and other capabilities metrics
- Select and / or customize
- Scoring systems tasks defined
- Setup in 2-3 work-sessions

Simple Configuration

- Activate Partner Acceptance
- Activate Channel team approval
- Track completion

Auto Data Sync

- Automatically sync or upload data
- Instantly sort, view and export opportunities, closed won, and excluded deals

Hosted Work-Session (Best Practices)

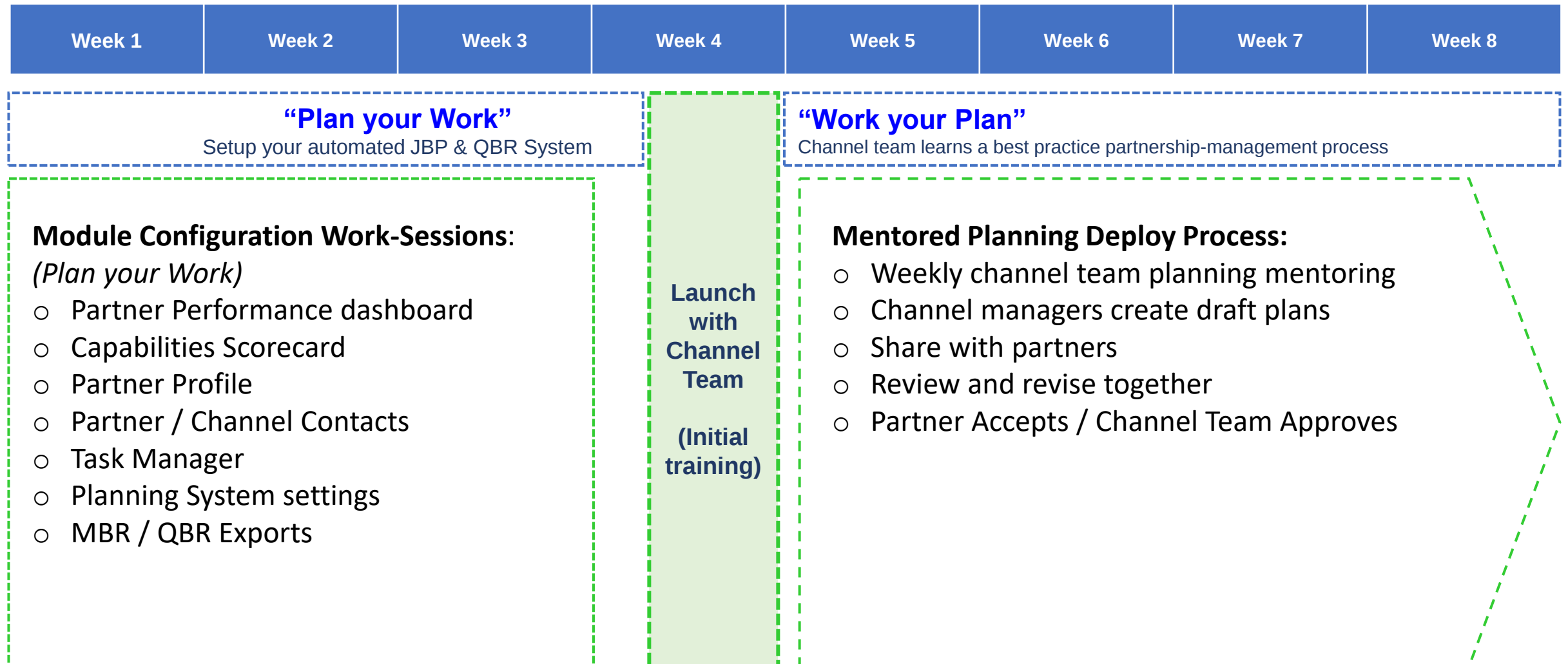
- Configure business plan
- Configure mktg. plan
- Configure tactics
- Configure lead waterfall
- Configure funds and programs

Hosted Work-Session (Best Practices)

- Name MBR / QBR
- Select Modules
- Select fields and metrics
- Configure format

F) How Long to Implement:

Setup in 30 days and Team & Partners Operational in another 30 days



G) JBP / QBR Integration:

How Integrations are Supported with Automated JBPs

Integration
and
Compliance is
a snap for
Automated
JBP and QBR
Systems

Single Sign On:



Serve Planning in
Current Systems



Integrate your Data



Compliance and
Performance



H) Why JBPs & QBRs in 2023?

What Role Do JBPs and QBRs Play with Managing your Overall Channel Ecosystem?

How to Build and Manage your
Brand Channel Ecosystem*



How JBP and QBR Tools
Enable Ecosystem
Mgmt. and “Orchestration”

Visualize and Recruit your Ecosystem
Partnerships

Market-to-Enable, and define Attribution Models

Ecosystem Data Map

Ecosystem Marketplace Development

Manage, orchestrate and measure your ecosystem



Jay McBain: Chief Analyst

Capabilities Scorecard



Business & Sales Action Plans



Opportunity Planning



Task Manager



One-Click MBR / QBR

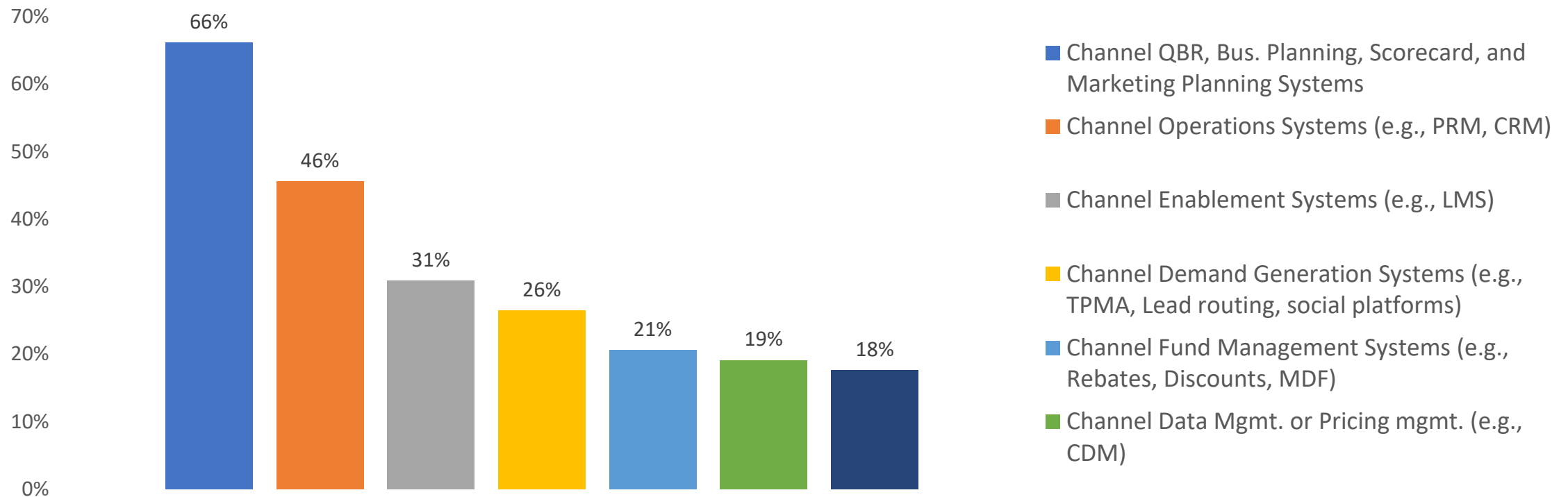


* Canalys 2022 Channels Ecosystem Landscape

H) Why JBPs & QBRs in 2023?

Findings from our Survey of Channel Sales Executive QBR Masterclass Participants:

What new channel systems are you looking to implement in 2023?



Conclusion:

66% of senior channel executives are looking to implement purpose-built planning and QBR tools for channel sales teams

End “The Channel Cataclysm” for your Brand



I) Q&A w/ Successful Channels: Automated JBP and QBR Tools



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