

The Case For Partner Business Plans, QBRs & ROI



**THE CASE FOR
PARTNER BUSINESS
PLANS, QBRs, & ROI**

INVICTUS
PARTNERSHIPS

Your Ecosystem
Needs Leaders.
You Can Give Them
Champion Partners.

INVICTUS (LATIN FOR UNCONQUERED) PARTNERSHIPS ARE ACTIVATED WITH BUSINESS PLANS, SCORECARDS,
AND QBRs. SUCCESSFUL CHANNELS PRODUCTIONS PRESENTS GARY MORRIS & BOB LAMKIN



Gary Morris

CEO / Founder

Gary.Morris@successfulchannels.com

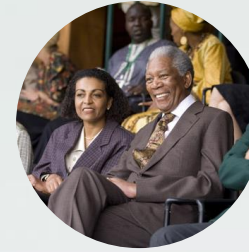


Bob Lamkin

VP of Business Development

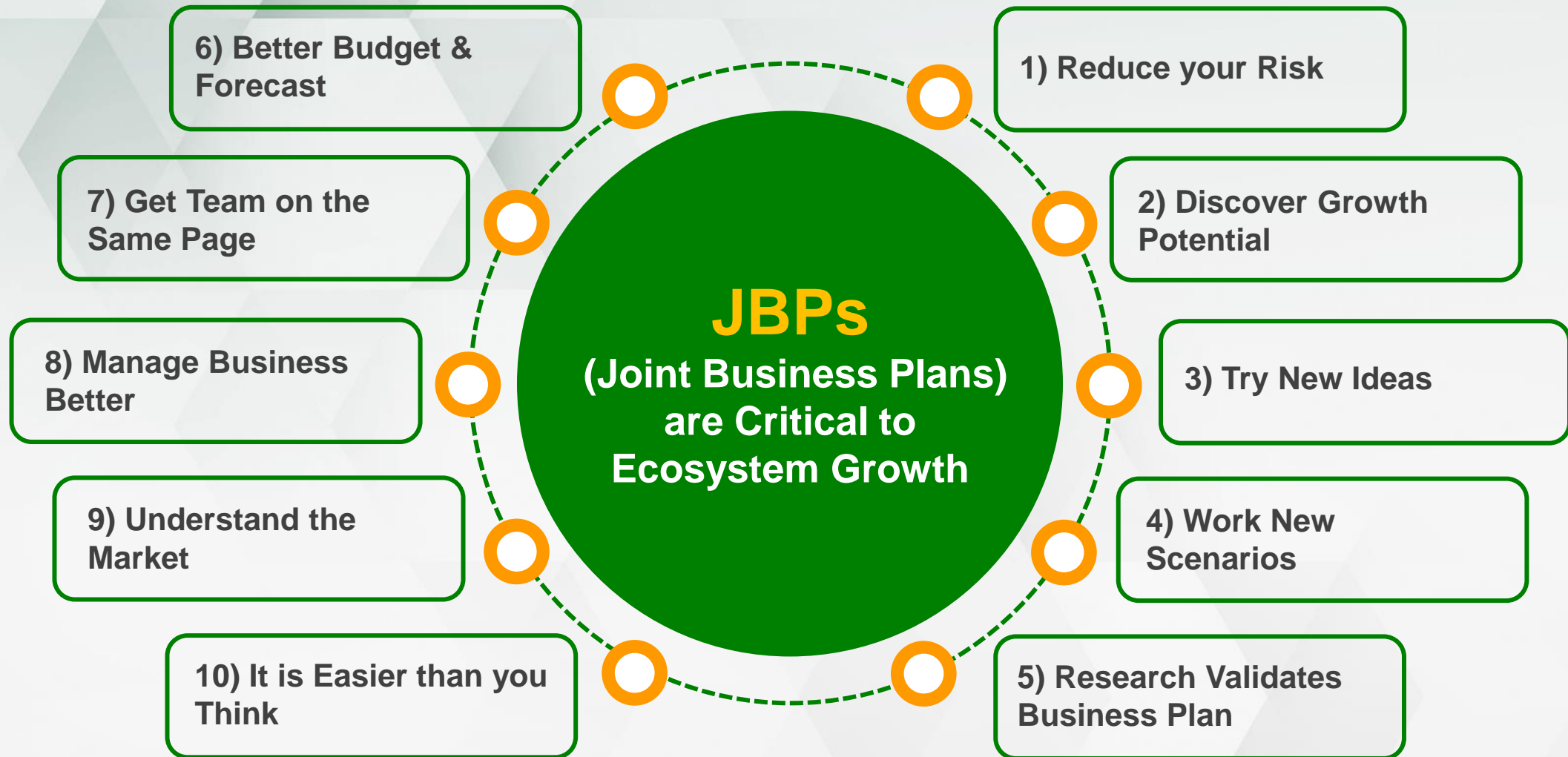
Bob.Lamkin@successfulchannels.com

10 Reasons to Implement JBPs with your Important Partnerships



After climbing a great hill, one only finds that there are many more hills to climb”

Nelson Mandela



10 Reasons to Implement JBPs with your Important Partnerships



“There is no passion to be found playing small – in settling for a life that is less than the one you are capable of living”

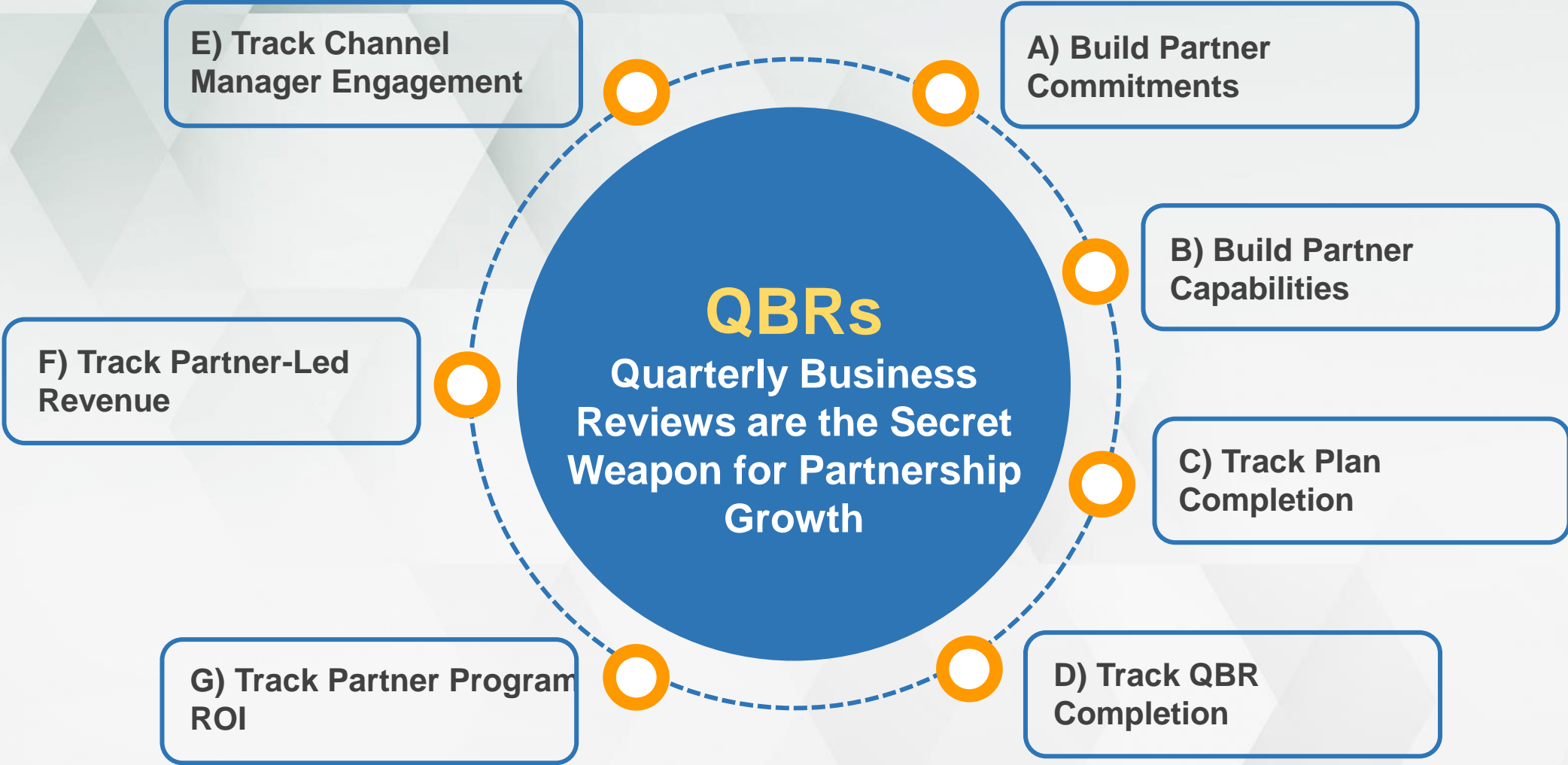
Nelson Mandela

Why do JBPs?	JBP Outcomes
1) Reduce your Risk	Add more certainty to the achievement of your partnership goals
2) Discover Growth Potential	Plan to identify new white spaces, vertical growth, alliance opportunities, or cross-sell / upsell strategies
3) Try New Ideas	Try new strategies that have worked for other brand partnerships
4) Work New Scenarios	Define new go-to-market schemes to develop enhanced growth opportunities
5) Research Validates Bus Plan	A large body of research has confirmed partnerships that are anchored by JBPs drive more growth
6) Better Budget & Forecast	JBPs assist in the development of joint budgets, plans, and outcome forecasts that are consistently more accurate
7) Get Team on Same Page	JBPs align the team on a common set of goals
8) Manage Business Better	Plan-your-work and work-your-plan with task assignments, reminders and completion tracking improves management and outcomes
9) Understand the Market	Helps define the market opportunities
10) It is Easier than you think	With automation, best practices, and guided workflow tools, it is a piece of cake

7 Reasons Why QBRs Build Superior Revenue-Producing Partners



"Money won't create success, the freedom to make it will"
Nelson Mandela



7 Reasons Why QBRs Build Superior Revenue-Producing Partners



"If you want to make peace with your enemy, you have to work with your enemy. Then he becomes your partner"

Nelson Mandela

Why QBRs are the Key

QBR Outcomes

1) Build Partner Commitments

Measure commitments by pipeline, revenue, # of customers, YoY growth, win rate, cycle time, certification achievement, and partner-led revenue

2) Build Partner Capabilities

Assess partners on a life-stage scorecard with sales, marketing, technical, services, renewal, support, growth, product, and market capabilities

3) Track Plan Task Completion

Track individually assigned and notified tasks by not-started, in-progress, and completed

4) Track QBR Completion

Track QBR execution by partner with a "QBR-Acceptance" feature for partner-verified reviews

5) Track Channel Manager Engagement

Track the levels of channel manager engagement by setting and tracking the # of goal / activity pairings developed, plan acceptance and approval, and QBR

6) Track Partner-Led Revenue

Track and report on revenue that is partner originated, partner assisted and partner referred

7) Track Partner Program ROI

Track the ROI of your partner-level and channel level investment

The Partnership Sales Cultivation Progression



“Education is the most powerful weapon which you can use to change the world “
Nelson Mandela



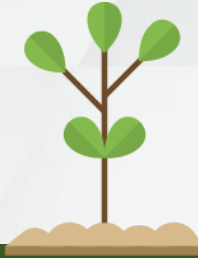
1.Targets

**SET
PARTNERSHIP
TARGETS**



2.Profile

**PROFILE
PARTNER
PRIORITIES**



3.Actions

**BUILD
ACTION
PLANS**



4.Tasks

**DEFINE
TASKS &
ASSIGN**



5.Remind

**TRACK &
REMIND
COMPLETION**



6.Assess

**ASSESS
CAPABILITIES
& PLAN**



7.Review

**MONTHLY/
QUARTERLY
REVIEWS**



8.Close









**MOTIVATE
TEAM &
CLOSE DEALS**

Work-Flow Automation Tools for Channel Sales Executives



"A good leader can engage in a debate frankly and thoroughly, knowing that at the end he and the other side must be closer and emerge stronger"

Nelson Mandela

Partner Manager Tasks	Exactly what Partner Sales Executives Need to Do	Supporting Modules	Partner Manager Tasks	Exactly what Partner Sales Executives Need to Do	Supporting Modules
 1) Targets	Define the sales, pipeline, and other business targets	Partner Performance Dashboard	 5) Remind	Assign these tasks to brand and partner team members	Task Assign, Notify, & Track
 2) Profile	Compile a business and strategy summary of your partner	Partner Profile	 6) Assess	Assess your partners Vs. your best practice	Capabilities Scorecard
 3) Actions	Develop action plans to build a growth business together	Business Action Plan	 7) Review	Conduct monthly and Quarterly (MBR/QBRs) reviews of performance and task completion	One-Click MBR / QBR to Motivate
 4) Tasks	Define tasks to achieve the business plan goals	Task Manager	 8) Close	Assist partners in closing deals to achieve targets	End Customer Account Planning

A Partnership Sales Cultivation Automated Toolset



"It is what difference we have made to the lives of others that will determine the significance of the life we lead."
Nelson Mandela



1.Targets

2.Profile

3.Actions

4.Tasks

5.Remind

6.Assess

7.Review

8.Close



Partner Performance Dashboard



Partner Profile



Business Action Plan



JBP Task Manager



JBP Task, Assign, Notify & Remind



Partner Life-Stage Scorecard



One-click MBR/QBR Export



Plan Work & Work-Your-Plan

A Partnership Cultivation Automated Toolset



1.Targets



2.Profile



3.Actions



4.Tasks



5.Remind



6.Assess



7.Review



8.Close



Partner Performance Dashboard



Partner Business Profile



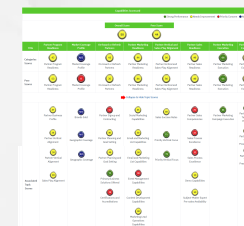
Business & End Customer Action Plan



JBP Task Manager



Automated Task Notify, Remind & Personal Dashboard



Partner Life-Stage Dashboard



One-Click QBR



Close Partner-Led Deals

Traditional Partner Sales Management Processes Don't Drive Revenue



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

An illustration showing a line of diverse people running along the edge of a cliff. They are carrying icons for PowerPoint (P), Excel (X), and Word (W). As they reach the edge, they begin to fall off the cliff, with some already in mid-air or on the ground below. The background is a bright blue sky with white clouds.

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

An illustration showing a city skyline at night. A trainwreck of blue train cars is derailed and falling. People are falling off the train cars, carrying software icons (P, X, W). The scene is chaotic and represents the failure of template-based processes.

The QBR Company

1) Partnership Targets: Four Metric Categories that Map Success



"As long as poverty, injustice and gross inequality persist in our world, none of us can truly rest."

Nelson Mandela



Metric Category Sample Metrics for a Partner Performance Dashboard

Metric Category	Sample Metrics for a Partner Performance Dashboard		
1) Revenue Metrics	Perf-to-Plan	This Year Vs. Last Year	% Change Q to Q
	Average Deal Size	\$ by Partner Role	Partner Led Vs. Brand Led
2) Pipeline Metrics	\$ & # Pipeline by Close Date Vs. Target	\$ & # Pipeline by Reg Date Vs. Target	\$ by sales Stage
	\$ Pipeline TY Vs. LY	Funnel Coverage	\$ Deal Registration Status
3) Sales Diagnostic Metrics	Win rate % by Quarter	Cycle Time Days by Quarter	Renewals Vs. Target
	New-to-Brand \$	Existing Vs. New Logo Vs. Renewal	Closed Won Vs. Closed Lost
4) Top 10 Metrics	Top 10 Customers by \$ Revenue YTD	Top 10 Customers by \$ Pipeline YTD	Top 10 Vertical \$ Revenue YTD
	Top 10 Products by \$ Revenue YTD	Top 10 \$ by Market Segment	\$ by Partner Role



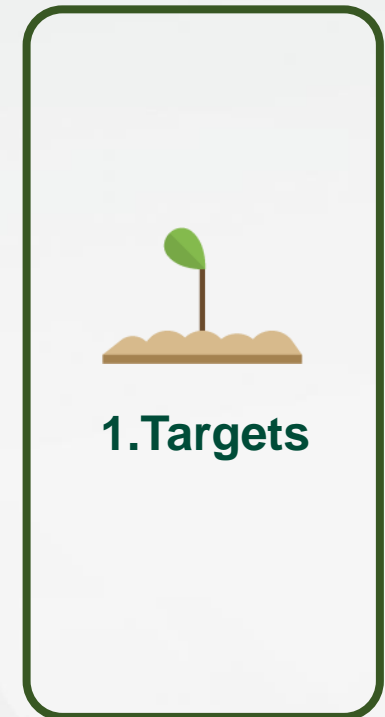
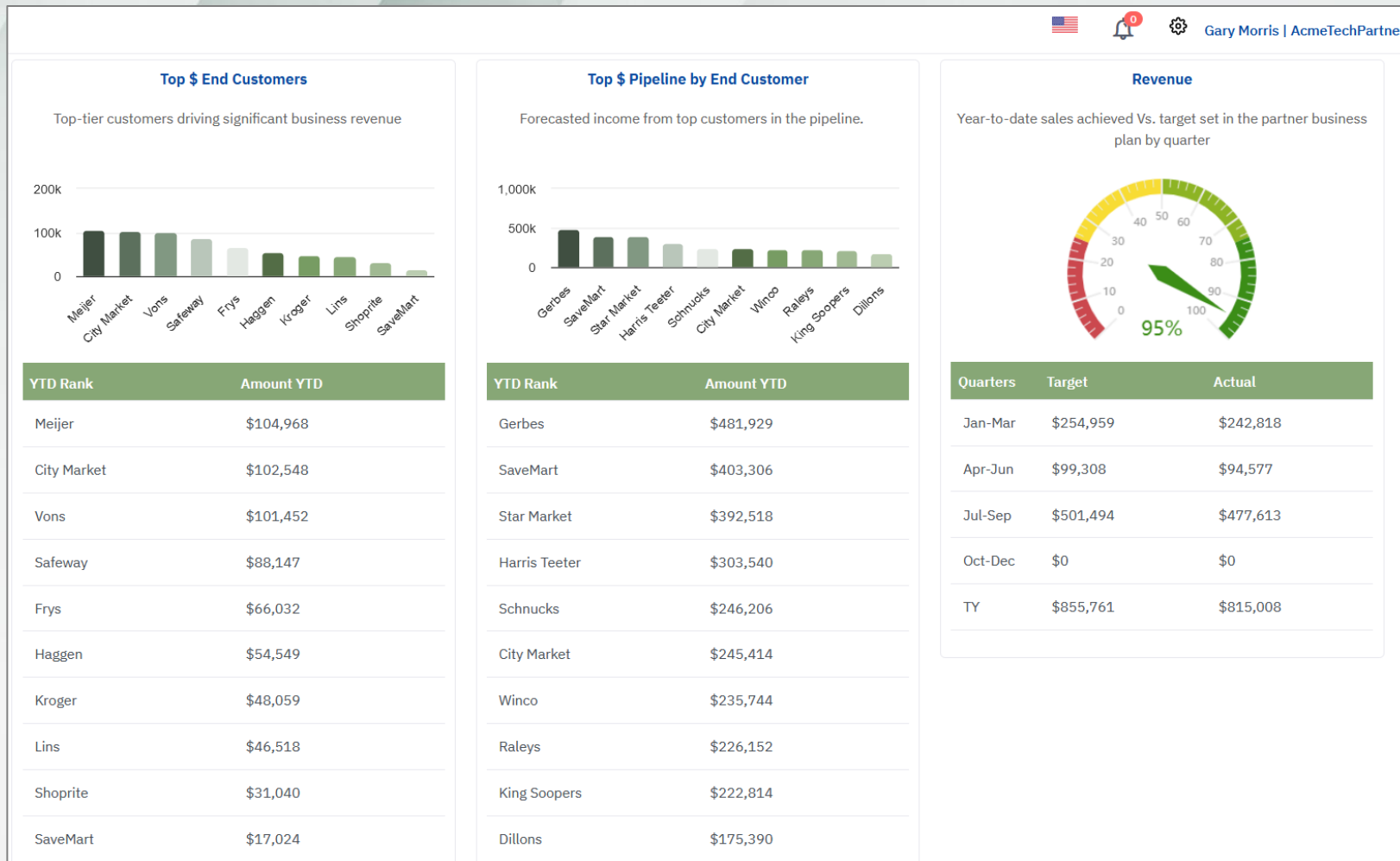
1.Targets

1) PPD: Guided Monthly Performance Discussion with Partners



"Never, never and never again shall it be that this beautiful land will again experience the oppression of one by another"

Nelson Mandela



2) Partner Business Profile Included in JBP and QBR



"A good head and good heart are always a formidable combination"

Nelson Mandela



Key Partner Executives

George Bailey	CEO
Mary Hatch	CSO
Clarence Odbody	CFO
Harry Bailey	Services Dir.

Partner Staff Profile

Sale Executives	3
Technical Services	4
Customer Service	2
Installers	4

Partner Business Priorities

1) Expand Services	Q2
2) Improve margin	Q4
3) Increase renewals	A4
4) Increase market penetration	Q2

Customer Business Profile

Healthcare	\$2.4M	11
Manufacturing	\$3.5M	14
Logistics	\$2.7M	8
Federal	\$4.4m	22



2.Profile

3) Part A: Guided Recommended Action Plans for More Partner-Led Revenue



"I stand here before you not as a prophet, but as a humble servant of you, the people"

Nelson Mandela

Typical Partner Action Plan Objectives:

- Acquire New Brand Logos
- **Execute Vertically-Focused Plays**
- Develop and Alliance Play
- Grow Non-Core Business
- Target Share Growth in Local Market
- Target Use Cases
- Enable to Generate More Partner-Led Deals
- Develop Partner Services Capabilities
- Develop New Pipeline
- Collaborative Value Proposition Development

- Automotive
- Education
- **Federal**
- Financial Services
- Healthcare
- Legal
- Manufacturing
- Media and Ent.
- Oil & Gas
- Pharma & Life S.
- Retail
- Svc. Providers
- State & Local

- **Develop Federal Target List of Accts.**
- **Execute Targeted Fed Demand Gen**
- **Federal Sales Training**
- **Overlap Fed Brand / Partner Accts.**



3.Actions

3) Part B: Guided Recommended Overlap End-Customer Account Planning Module



"I stand here before you not as a prophet, but as a humble servant of you, the people"

Nelson Mandela



Typical Partner / Brand Sales Stages:

- MQL
 - SQL
 - SAL
 - **Opportunity**
 - Demo – Solution Design
 - Proposal – SoW
 - Closed Won
- **Approve deal registration, pricing, and timing**
 - **Size the deal based on # of users and implement**
 - **Scope deal based on customer needs and training**
 - Report / update deal status on timing, approval steps, and implementation barriers



3.Actions

4) With Partner Business Planning and QBRs, All Roads Lead to Tasks



"It always seems impossible until it's done."

Nelson Mandela

Once action plans are created, tasks need to be managed:

- 1) Select and assign tasks
- 2) Send reminders
- 3) Manage your personal task dashboard
- 4) Review status in your MBRs and QBRs

Completion Status:

Completed

Not Started

In Progress

Completed



TASK SUMMARY DASHBOARD ● Not Started ● In Progress ● Completed ● Recommended

Total Tasks: 15 Task(s) Assigned to Gary Morris [Filter](#) [Export](#)

The below table shows the tasks that are assigned to you. You can manage the Task Completion from here.

Task Source	Partner Name	Task Title	Update Tasks Here	Actual Task Completion	Task Completion Logs	Hide Completed Tasks
	AcmeTechPartner	Virtual Event	14 of 14		Start Date: 01/24/2024 Last Updated Date: 04/06/2024 Planned Completion Date: 12/22/2023 Actual Completion Date: 01/24/2024	Hide Task
	AcmeTechPartner	Execute Targeted Federal Demand Gen Campaign	6 of 14		Start Date: - Last Updated Date: 04/06/2024 Planned Completion Date: 03/29/2024 Actual Completion Date: -	
	AcmeTechPartner	In-Person Event	13 of 14		Start Date: 04/06/2024 Last Updated Date: 04/06/2024 Planned Completion Date: 10/15/2023 Actual Completion Date: -	

5) Task Notifications and Reminders Get Plans, Actions and QBRs Done



"There can be no keener revelation of a society's soul than the way in which it treats its children."

Nelson Mandela

Gary Morris Personal Dashboard

[Task Summary](#) | [Acceptance and Approval](#)

Select Partner: AcmeTechP... | Select Fiscal Year: FY2024 (Jan 24 - Dec 24)

PARTNER PLAN APPROVAL FOR ACMETECHPARTNER

BUSINESS PLAN ACCEPT AND APPROVE ● Not Accepted / Not Approved ● Approved / Accepted ● Pending in Current Period ○ Pending in Future Period

Application	Period	Acceptance Status	Acceptor Name	Acceptor Signature	Acceptance Date	Approval Status	Approver Name	Approver Signature	Approval Date
Overall	FY (Jan 2024 - Dec 2024)	●	Alex Johnson	<i>Alex Johnson</i>	04/02/2024	●	Gary Morris	<i>Gary Morris</i>	04/05/2024

[Reverse Approval](#)

QBR ACCEPTANCE (PARTNER CONTACTS ONLY) ● Not Accepted / Not Approved ● Approved / Accepted ● Pending in Current Period ○ Pending in Future Period

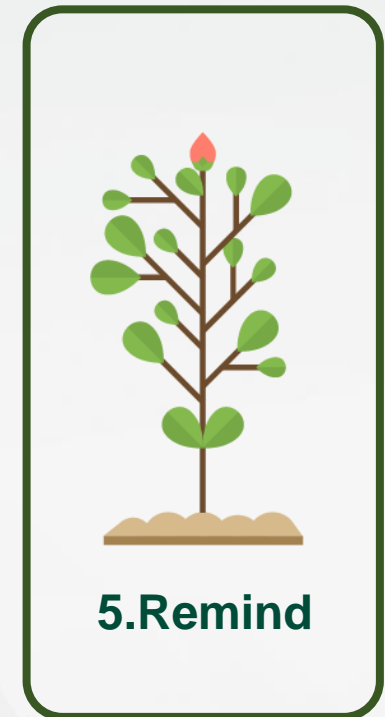
Application	Download QBR	Period	Click to Accept	Acceptor Name	Acceptor Signature	Acceptance Date
QBR		Q1 (Jan 2024 - Mar 2024)	●	Alex Johnson	<i>Alex Johnson</i>	04/10/2024
		Q2 (Apr 2024 - Jun 2024)	●	Alex Johnson	<i>Alex Johnson</i>	04/10/2024
		Q3 (Jul 2024 - Sep 2024)	○			
		Q4 (Oct 2024 - Dec 2024)	○			

ASK SUMMARY DASHBOARD

Total Tasks: 15

The below table shows the tasks th

Task Source	Partner Name	Task Title
	AcmeTechPartner	Virtual Event
	AcmeTechPartner	Execute Targeted Federal Demand Gen Campaign
	AcmeTechPartner	In-Person Event



6) How to Put your Life-Stage Scorecard into Action



“Real leaders must be ready to sacrifice all for the freedom of their people.”

Nelson Mandela

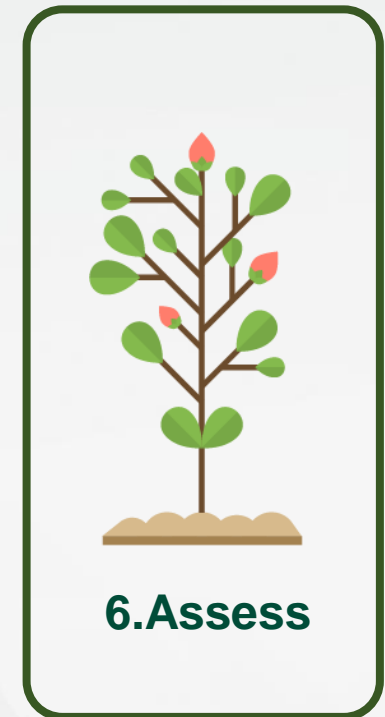
1
Questionnaire

2
Capabilities Scorecard

3
Set Goals

4
Action Plan

Capabilities Scorecard								
● Strong Performance ● Needs Improvement ● Priority Concern ● Non Scoring								
Overall Score				Peer Score				
50				44				
Title	Partner Program Readiness	Market Coverage Profile	On-board or Refresh Partners	Partner Marketing Readiness	Partner Vertical and Sales-Play Alignment	Partner Sales Readiness	Partner Marketing Execution	Partner Sales Execution
Categories Scores	42	N/S	41	44	56	40	66	63
Peer Scores	53	0	35	44	56	40	66	63
➔ Collapse to Hide Topic Scores								
Associated Topic Scores	47	N/S	33	45	40	25	66	82
	Partner Business Profile	Brands Sold	Partner Signup and Contracting	Social Marketing Capabilities	Sales Success Rates	Partner Sales Competencies	Partner Marketing Campaign Execution	Partner Sales Targeting Meeting
	38	N/S	40	50	71	33		43
	Partner Vertical Alignment	Geographic Coverage	Partner Planning and Goal Setting	Email and Marketing List Capabilities	Priority Vertical Focus	Sales Process Excellence	Partner Sales Target Presentations	
	38	N/S	40	50	71	33		43
	Partner Vertical Alignment	Geographic Coverage	Partner Planning and Goal Setting	Email and Marketing List Capabilities	Priority Vertical Focus	Sales Process Excellence	Partner Sales Target Presentations	
	40		71	30		50		
	Sales Play Alignment	Primary Business Solutions Offered	Event Management Capabilities	Content Development Capabilities	Demo Capabilities	Subject-Matter Expert Pre-sales Availability		
		20	50	40				
		Certifications and Accreditations	Marketing Lead Operations Capabilities					

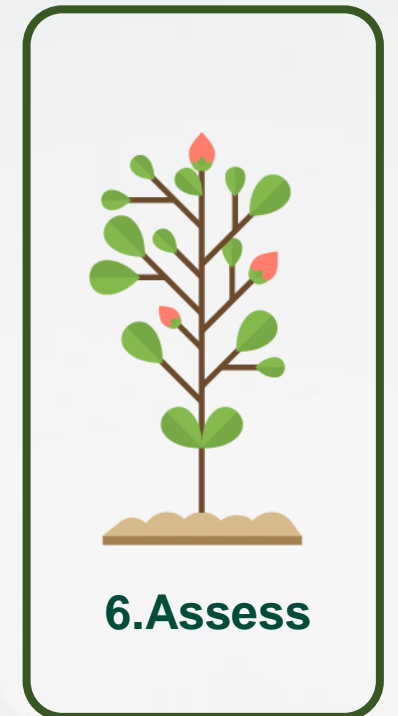


6) An Example of a Partner-Ready Best Practice Scorecard Taxonomy



"It is not our diversity which divides us; it is not our ethnicity, or religion or culture that divides us."
Nelson Mandela

Metric Category	Sample Metrics for a Partner Performance Dashboard		
Partner Fit	Vertical Expertise	Strategy Alignment	Strategy Focus
	Business Vision	Services Alignment	
Partner Onboarding	Contracting	Product briefing	Partner Planning
	Partner target setting	Partner action planning	
Partner Sales Enablement	Brand Sales Skills	Demo capabilities	Ability to pitch
	Deal progression	Deal registration	
Partner Marketing Enablement	Target list development	LinkedIn connection development	Content development
	Multi-touch campaigns	Digital marketing	Website marketing
Partner Technical Enablement	Product technical capabilities	Integration capabilities	Security capabilities
	Compliance capabilities	Install and repair / svc. capabilities	
Partner Service Enablement	Service practice	Service offerings	Services staff
	Services strategy alignment		
Partner Renewal Enablement	Renewal cadence management	Renewal forecasting	Renewal negotiation
	Renewal risk management	Win / loss analysis	
Partner Certifications	Sales certifications	Marketing certifications	Technical certifications
	Services certifications		



7) Every-Partnership Interaction is a Business Development Opportunity



"It is in the character of growth that we should learn from both pleasant and unpleasant experiences."

Nelson Mandela



Opportunity Mgmt.

Build Account Plans

Cover / Table of Contents

Partner Performance Dash

Opportunity Mgmt.

OVERLAP ACCOUNT PLANNING

Account Mapping Matrix

		ACME TO CHRYSLER		
		Customers	Open Opportunities	Prospects
INDUSTRIAL EQUIPMENT POPULATION	Customers	3 Overlap	32 Overlap	2 Overlap
	Open Opportunities	20 Overlap	340 Overlap	44 Overlap
	Prospects	3 Overlap	25 Overlap	1 Overlap

Build Account Plans

Account	Customer	Product	Opportunity	Lead	Next Step	Due Date	Status
...

Cover / Table of Contents

Section	Page
Executive Summary	1
Business Action Plan	2
Partner Performance	3
Channel / Partner Contacts	4
Capabilities Scorecard	5
Plan Accept / Approve	6



Opportunity Mgmt.

Opportunity ID	Customer	Product	Status	Value
...

Manage & Track Deal Progress

Manage & Track Deal Progress

Deal ID	Customer	Product	Value	Stage	Owner	Start Date	End Date	Status
...

Business Action Plan

Business Action Plan

Task	Priority	Due Date	Status
...

Partner Performance Dash



Channel / Partner Contacts

Channel / Partner Contacts

Channel	Partner	Contact	Role
...

Task Manager

Task Manager

Task	Priority	Due Date	Status
...

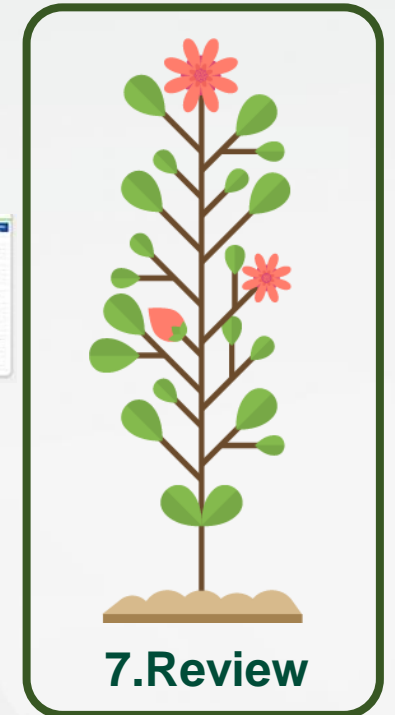
Capabilities Scorecard



Plan Accept / Approve

Plan Accept / Approve

Item	Value	Status
...



11 Attributes of JBP & QBR Systems that Drive Adoption



- Motivate Partners
- Excite Channel Team Members
- Propel Collaboration
- Spur Pipeline Growth
- Spark Revenue Contribution



8) JBPs and QBRs are Measured by Partnership Strength and Outcomes



"Since we have achieved our freedom, there can only be one division amongst us: between those who cherish democracy and those who do not."

Nelson Mandela

Direct JBP / QBR Outcomes:

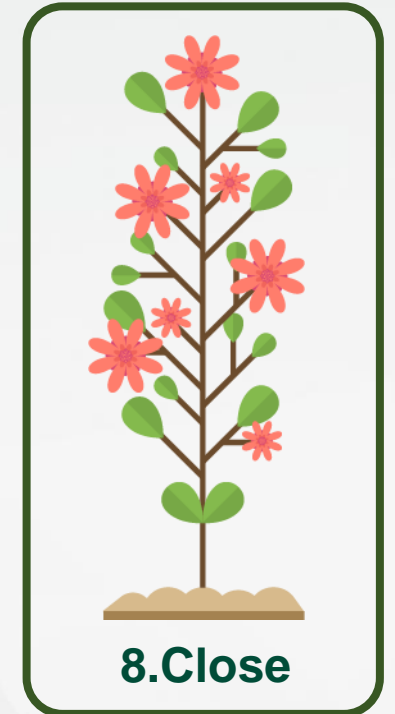


- Committed Partners
- Capable Partners
- Partners with Action Plans
- Tasks Assigned
- Task Notifications and Reminders Sent
- Partners Accept and Brand Team Approves Plans
- MBRs & QBRs completed

Derived JBP / QBR Outcomes:



- Opportunities generated
- Pipeline registered
- Revenue delivered
- Profits earned
- ROI achieved



8.Close

Key Planning System Engagement Reports to Monitor Your Team



"I like friends who have independent minds because they tend to make you see problems from all angles."

Nelson Mandela

Plan Creation

- Business Action Plan Completed
- Scorecard Completed
- Partner Profile Completion

Plan Acceptance / Approval

- Partner Plan Acceptance
- Brand Team Plan Approval

Channel Manager Plan Engagement

- Channel Manager Login tracker
- Channel Manager plan activity log
- Partner task completion

Partner Life-Stage Scorecard

- Partner scorecard completion
- Partner scorecard improvements

Account Activity and Profile

- Account Profile
- Account segmentation attributes
- Other account attributes

Partner Performance Dashboard

- Year over year:
- Revenue
- Pipeline
- Win rate
- Cycle time
- Partner-Led Revenue
- Other Custom metrics

Business Plan Activity **Report**

Partner plan & QBR Acceptance and Brand team plan approval **Report**

Log system activity and completion **Report**

Partner capabilities scorecard **Report**

Account profile data **Report**

Partner YoY Performance **Report**

A Partnership Cultivation Automated Toolset Fully-Deployed in Weeks



"It is in the character of growth that we should learn from both pleasant and unpleasant experiences."
Nelson Mandela

QUICK START (2-3 Weeks)

Pre-Integrated JBP & QBR Best Practices for Rapid (2-3 week) config. & deploy



FULLY CUSTOM (4-6 Weeks)

Pre-Config Best Practices + Consulting to Fully-Customize for your Brand Channel



Work-Flow Tools Combined with Best Practices allow for Simple Deployment



"There is nothing like returning to a place that remains unchanged to find the ways in which you yourself have altered."

Nelson Mandela



QUICK START (2-3 Weeks)

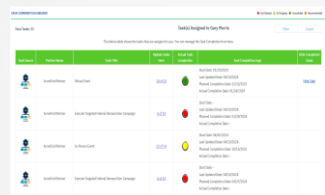
Recommended (proven) Metrics, actions, tasks and JBP & QBR formats can be configured and ready to implement



Partner Performance Dashboard



Business Action Plan



JBP Task Assign, Notify, & Remind



One-Click MBR / QBR Export



FULLY CUSTOM (4-6 Weeks)

Full-system customization / deploy led by Successful Channels



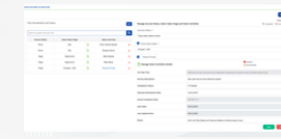
Partner Performance Dashboard



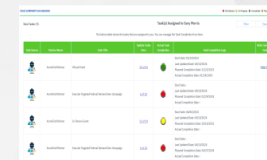
Partnership Life-Stage Scorecard



Business Action Plan



End-Customer Account Planning



JBP Task Assign, Notify, & Remind



One-Click MBR / QBR Export



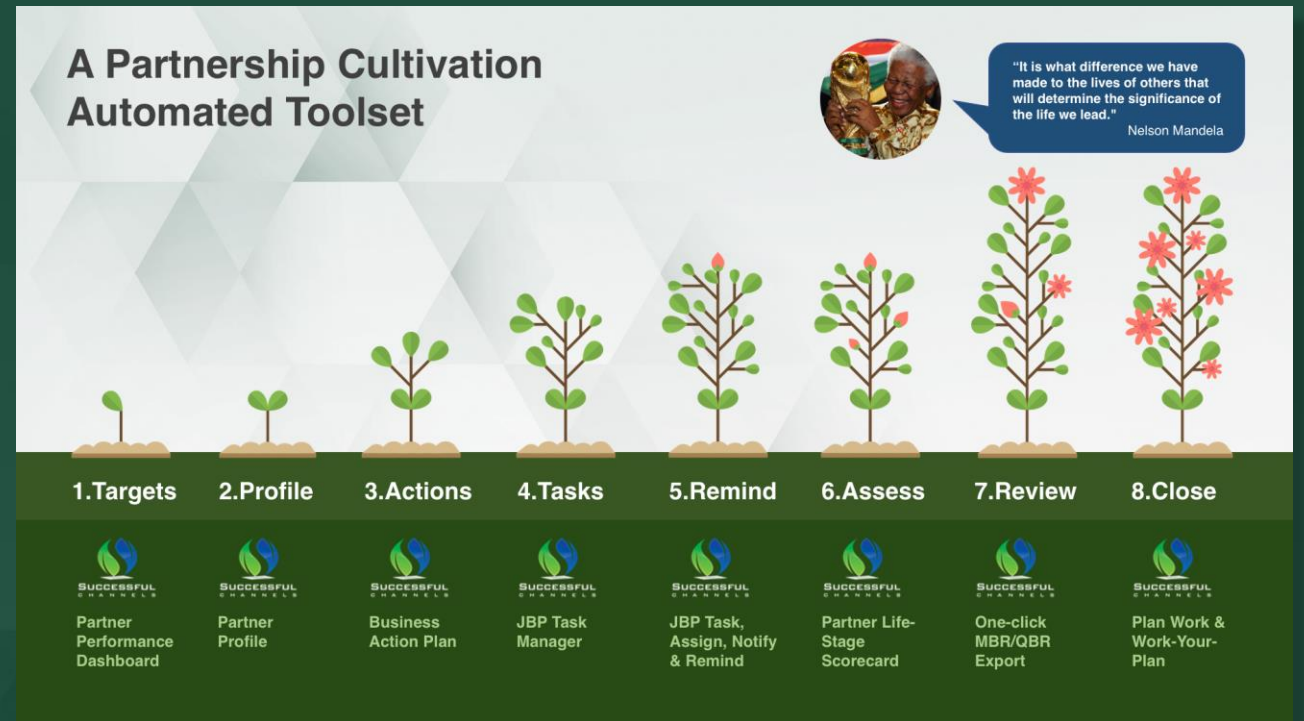
JBP Task Manager



Plan-Work & Work-Your-Plan

Contact Us: info@successfulchannels.com

A Partnership Sales Cultivation Automation Toolset



Gary Morris

CEO / Founder

Gary.Morris@successfulchannels.com



Bob Lamkin

VP of Business Development

Bob.Lamkin@successfulchannels.com