



A GUIDE TO MAXIMISING SUCCESS

The 6 stages of channel partner
development and the role of training

INTRODUCTION

The aim of channel partner training is to enhance the relationship between you and your partners, and by doing so, deliver your solutions to a wider and wider audience of end-users.

Training supports your partner programme throughout each phase. The key is to follow a clear and concise training programme that covers the following six stages:

1. **Recruit**
2. **Engage/Plan**
3. **Educate**
4. **Motivate**
5. **Sell/Promote**
6. **Monitor**

Your training programme leverages your expertise, knowledge and experience to deliver a comprehensive range of learning resources to help partners achieve the highest quality solutions. You will continually strive to attract and retain partners and strengthen existing partners to further engage, deepen, and lengthen the relationships.

Firstly, let's look at the types of partners and their roles in the selling ecosystem.



→ TYPES OF PARTNERS

Each partner type represents a different kind of relationship and each plays a different role in the sales pipeline:

INSTALLERS/RESELLERS

Local experts who understand the regional specifications that impact the solution. The training and certification programmes provide assurance that customers will receive consistent, reliable service.

INTEGRATORS

Organisations that integrate solutions with other technology to address the customers' complex issues.

CONSULTANTS

Consultants help ensure every aspect of the customer's network is designed for excellent quality and performance.

DISTRIBUTORS/RETAILERS

Distributors focus on the complex logistics of stocking and distributing solutions around the globe.

Now, let's take a closer look at each of the six areas of partner development and where training fits in.

**Without effective onboarding, channel partners take over a year to become fully productive, according to 24% of companies.
(CSO Insights)**



→ STAGE 1 - RECRUIT

This first stage focuses on **attracting the most beneficial partners** to the organisation. Not only must you identify the best potential partners, but you must also provide a compelling training offering to encourage them to invest in the development of the relationship.

Think of this stage as **partner recruitment and feedback**. Discover **what matters** most to your partners and **align your goals**. The consequences for doing it poorly are disastrous - a company that recruits the wrong partners wastes valuable time and resources.

By **clearly defining** and communicating the types of **relationships** you are looking to create and the training required, potential partners will **self-select** working with you.

By **simplifying** the levels and categories of relationships, potential partners can more **easily identify** where they fit into the overall partner programme.

Of course, the potential partner still has to fit the **target profile** and complete the training for the partnership to flourish.

“72% of Partners aren't able to connect offerings to buyer needs and challenges (360Insights 2018)”



→ STAGE 2 - ENGAGE/PLAN

The next stage is to move **beyond a handshake** into a **productive relationship** by engaging new partners in every facet of your organisation.

An **effective partner programme** requires creating a partner-centric, partner-friendly organisation **that supports partners** from all departments, including training, finance, marketing, sales, product management, and operations.

To engage a partner, you should **formalise a training plan** that clearly spells out the requirements, particularly the certification commitments of each side. At this early stage, simple is better. A long and arduous agreement can chill a relationship before it gets started.

In addition to the agreement, you **define 'rules of engagement'**. This should include more specific expectations of a partner. For example, a description of the partners training requirements and the training commitments of both sides.

You should further describe the **certification courses** and what resources you and the partner will commit to - and when - to help gain compliance.

“If a partner doesn't start to market and sell your offering within the first 90 days of recruitment, it's highly likely that they ever will.

(SiriusDecisions)



STAGE 3 - EDUCATE

It is important to **allocate resources** to educate partners on how to **position products** and services effectively to a target market, helping to ensure successful sales and happy customers. If partners are **poorly educated** on product capabilities, then customer expectations will be set incorrectly, which could lead to one of **three** outcomes:

- 1) a missed sales opportunity, the result of a partner underselling a value proposition; or
- 2) a dissatisfied customer, the result of a purchase decision based on incorrect information; or
- 3) increased support costs and damaged reputation due to lack of partner knowledge and incorrect installations.



While the first case of missing a sale is a problem, it is not as worrisome as the second and third cases. Unfortunately, dissatisfaction is directed at your product or service, not at the partner.

Many companies are good at delivering initial partner training but have trouble with ongoing updates. It's crucial to maintain your training programme and continually communicate new information with your partners.



Educating partners to accurately represent your products and your business as a whole is a critical stage in partner development.



STAGE 4 - MOTIVATE

Once you have successfully recruited, engaged, and educated your partners, you will have an army full of **highly trained sales teams and technical engineers**. So how do you motivate them to pick up the phone, pound the pavement, and promote your product?

Long-term motivation has to come from you **understanding your partner's strategic goals** and ensuring that you are aligned in helping to achieve them.

MOST SUCCESSFUL WAYS THE TRAINING CONTRIBUTES TO MOTIVATING YOUR PARTNERS

- Use website based **partner locators** that offer end-users the tools to view partners and their training statuses.
- Offer them the opportunity for **self-promotion** with certifications, badges and partner accreditations.
- Use **incentives** to reward the completion of training goals and KPIs.
- Link **certifications** achievement with partner tiers and statuses to encourage participation in additional training.
- Offer **discounts** for increased engagement with your training and brand.
- Create internal **competitiveness** by including gamification within your training courses.
- Promote and support **communication** within partners and with the wider community.



→ STAGE 5 - SELL/PROMOTE

The next stage is fully **supporting partners** throughout the collaborative sales process.

This begins with providing the **marketing and sales** support needed for a partner to promote your product or service and continues with complete **partner and customer** support after the sale.

The training aims to **enrich the sales** process, from purchase to installation and servicing. However, a collaborative **training plan** is only effective when it is documented and regularly reviewed. Plan components should have **measurable goals**, assignment of responsibilities and timelines for actions.

Regular **reviews** allow for making **adjustments** before mistakes happen, results are missed, and relationships get cold.

Training for this stage includes:

Technical training

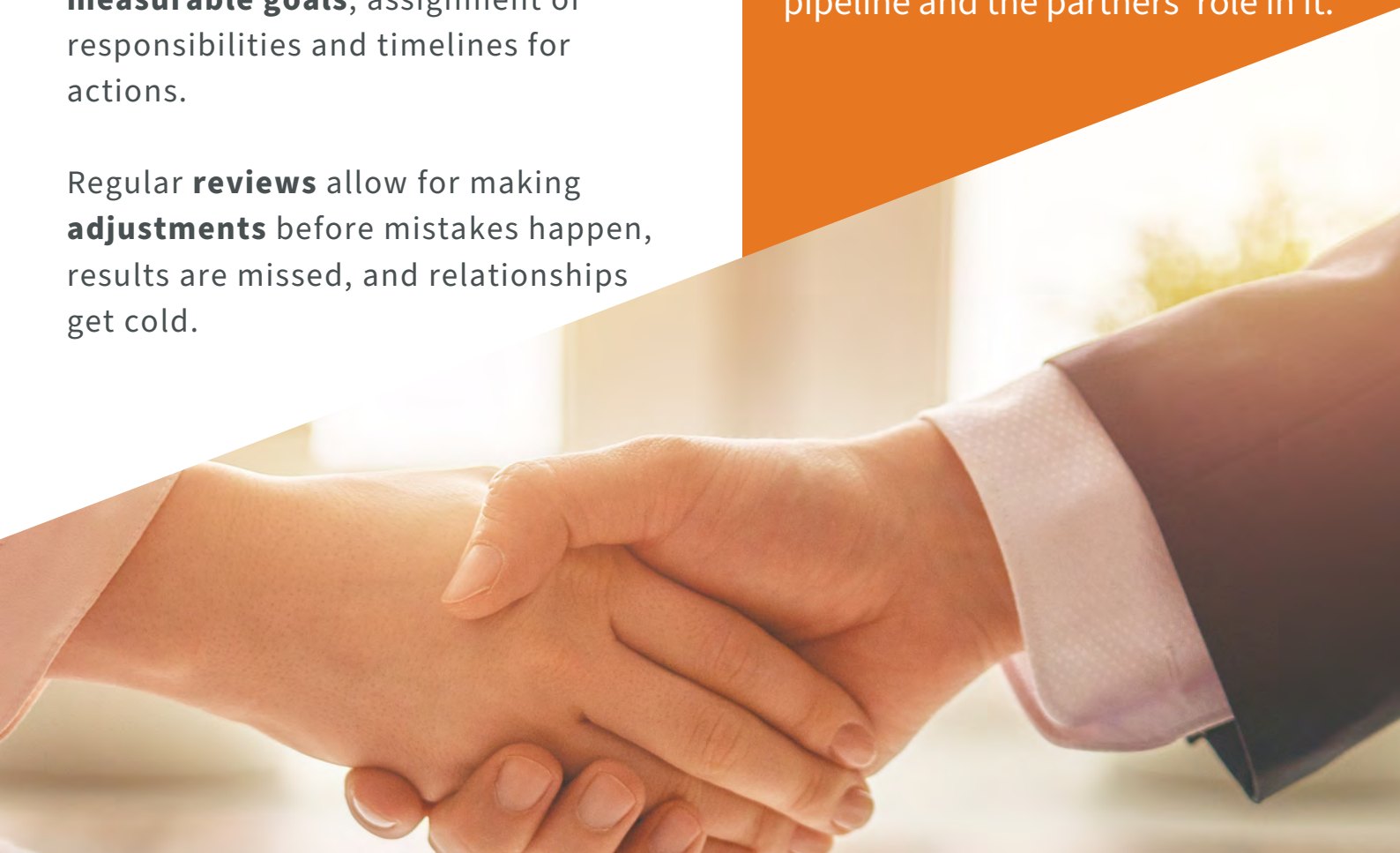
Share in-depth up-to-date product knowledge tailored to the particular partner type.

Industry expertise

Share appropriate, timely information to enable partners and give them a competitive advantage.

Sales training

Share sales knowledge and insight, including how to manage the sales pipeline and the partners' role in it.



→ STAGE 6 - MONITOR

Effective **management of a partner training programme** is the key to success. Without proper measurement, neither performance nor productivity can be tracked or modified.

Having a **clearly documented training plan** with partners is also essential. It starts with having a well thought out training plan and fully understanding how a partner's expertise and knowledge will play in that plan.

Understanding partners' training needs and drivers ensures you can **develop a mutual plan** that would address the partners goals, motivate the partners, and keep them engaged.

When planning your training programme, it's important to **establish key performance indicators** to enable you to effectively monitor progress.

Objective measurements can ensure that the most trained partners receive the appropriate amount of resources and also the additional promotion that forms part of partner segmentation..



Partner training plans are an important part of your ability to **manage your partners** and your overall partner programme.

Gone are the days of sixteen-page plans. You should rely on a **fill-in-the-blank training plan** that covers the basics:

- **Target certifications**
- **Solutions specialisations**
- **Minimum student requirements**
- **Actionable training/learning goals**

SUMMARY



The successful growth of your channel lies in proper partner training, and measuring and monitoring partner performance against these training profiles.

From our years of experience in global channel partner training programmes, we have created a suite of services that have been designed to allow your training programme to be delivered, without an internal team required.

As standard, we fully manage your programme and provide a specifically designed Learning Management System (LMS). Our services include:

- **Fully managed LMS**
- **Customised reporting and monitoring**
- **Ongoing training programme management**
- **Dedicated, personalised global learner support**
- **Complete learning and development administration**
- **eCommerce management**

Interested in learning more about how we can work in partnership with you to deliver a high-quality, well-supported and engaging training programme?

Book a chat with us now:

BOOK NOW