

# Workshop

## Optimizing Your Channel as a Service (CHaaS) Platform for Marketing

Discover how to keep your CHaaS engine revved up by identifying and optimizing key supplier processes and work streams

### Overview

*This workshop provides an overview of all processes and work streams suppliers need to optimize their Channel as a Service (CHaaS) platform for marketing to, through and for partners. Specifically, Zift Solutions experts will work with your channel marketing team to assess and address current channel marketing challenges, ecosystems and infrastructure, along with CHaaS expectations for marketing, then design a detailed configuration and implementation blueprint before any technology is deployed. Channel marketing teams will learn how to:*

- *Identify channel marketing program needs, deliverables and team responsibilities prior to launch to optimize your CHaaS platform for marketing*
- *Ensure successful channel marketing strategy, CHaaS platform configuration, launch plan and ongoing management of your CHaaS environment*
- *Set proper expectations and follow proven best practices to maximize CHaaS return on investment (ROI)*



### The Problem

While CHaaS holds the promise of better results and higher revenue for channel programs by automating critical channel marketing processes, it is a complex solution that must be tailored to match the unique requirements of different industries, organization types, and varying levels of channel marketing resource availability and expertise. To ensure an optimal launch and long-term success, process must precede technology. Without a clear vision, strategy and roadmap, even the most well-intentioned CHaaS initiatives can get off to a slow start or even fail.



### The Solution

Zift Solutions will share its proven processes and procedures to guide your implementation team through a painless CHaaS platform configuration and launch to optimize channel marketing success. Successful implementation and optimization of a CHaaS platform for marketing relies on a strong partnership between the supplier's channel marketing team and its CHaaS provider. For this workshop, Zift acts as the guide to ensure the project progresses at the right pace based on your organization's level of engagement, established infrastructure, ultimate CHaaS goals and channel marketing capabilities.

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### What's Included?

Zift provides a complete assessment of your organization and channel marketing ecosystem, then works with your team to define and develop a CHaaS blueprint that focuses on four (4) critical areas: marketing program management, channel engagement, content management and platform configuration. Key components include:

#### Supplier Assessment

Before beginning the implementation process, Zift starts with an in-depth discovery and analysis of your channel marketing ecosystem, available resources and how CHaaS will fit-in successfully. The results of this assessment phase provide a detailed scorecard highlighting strengths and gaps within your current channel marketing structure and foundation, data and reporting practices, partner marketing maturity and intelligence, marketing and campaign content, and established channel marketing and sales programs and services.

#### CHaaS Marketing Implementation Blueprint

Once discovery and intelligence gathering is complete, Zift prepares a well-defined project plan that acts as a guide for your CHaaS implementation team and ensures appropriate resources and expertise are available at the right time during specific phases of your CHaaS platform launch and ongoing management. Zift's proven process includes four (4) key cornerstones to optimize CHaaS environments for marketing from the start:

##### MARKETING PROGRAM MANAGEMENT

Together, we will define your CHaaS marketing strategy and vision, set baseline program goals, assign specific roles and responsibilities for all project team members, and schedule reporting benchmarks and to-partner communications.

##### CHANNEL ENGAGEMENT

Our CHaaS experts work with your channel marketing team to prepare channel program recruitment activities, finalize partner/distributor onboarding processes, schedule Zift123 training for partners and partner-facing teams, and provide ongoing channel engagement support as needed (basic, premium, concierge).

##### CONTENT MANAGEMENT

Zift specialists help your team develop a content strategy and cadence for content updates (campaigns, web, email, social), including content tagging and taxonomy, template creation for multiple marketing tactics and resourcing for ongoing marketing content creation and management.

##### PLATFORM CONFIGURATION

Zift determines the best course of action to streamline integration for lead distribution, SSO, partner metadata, etc. into your CHaaS environment. Our teams will work together to design professional program branding and to-partner communication templates as well as determine and configure partner filters, accounts and registration processes. We'll also oversee setup for selected marketing tactics (web, email, social), collateral, and preferred CHaaS modules (PRM, LMS, CMM, CPQ, etc.)

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### Typical Project Outcomes

- Develop and communicate a well-defined strategy that is embraced by the entire organization responsible for delivering against channel marketing initiatives before moving forward with the tactical and operational components of CHaaS
- Ensure clear and full understanding of the discovery and implementation process for a CHaaS platform launch
- Refine and optimize your CHaaS environment to match the unique needs of your marketing ecosystem and channel partner community



### Who Should Participate?

Channel sales or marketing operations teams

Channel sales and marketing leaders

Partner account managers

Partner sales reps (and selected buyers)

Field marketers and demand creation marketers

Channel sales enablement leaders

Organizations with new or evolving channel programs

Organizations interested in implementing a CHaaS platform



### Sample Data Collection

Zift will work with the appropriate parties to gather and review relevant information, such as:

- Audience profile to adjust the workshop based on the specific audience (client, prospect, strategic Zift partner, etc.)
- Depending on the audience, the workshop can provide in-depth examples and scenarios based on relevant sample supplier(s)
- Information on relevant channel marketing initiatives, goals, incentives programs and investments, including co-op, MDF and variable operating expenses, such as current demand creation programs

### Workshop Deliverables

Key deliverables will include:

- Full supplier discovery and assessment worksheet, including marketing strengths and gaps
- Presentation outlining key phases, processes, context, next steps and more
- Detailed blueprint for CHaaS platform configuration, launch and ongoing management
- A Final Report that includes prioritized recommendations and an action plan for optimizing your CHaaS environment for marketing