



9 Partner Onboarding Best Practices to Set Partners Up for Success



Once you've buttoned down your strategy for recruiting channel partners, you're ready to establish your channel partner onboarding process.

Onboarding is pivotal to your partners' success in selling your business-to-business (B2B) services, so it must be a focal point of your channel development program. The old adage "don't reinvent the wheel" is more apt than ever here, as we spoke with nearly a dozen channel leaders who shared similar views on partner onboarding best practices.

What is Channel Partner Onboarding?



Channel partner onboarding is a multistep process to initiate and integrate new partners into your company's partner program. Partner onboarding done well requires more than a couple of web meetings, portal logins and training links; it's a months-long process that requires both of your organizations to get to know the other so that you can go to market as partners.

Partner onboarding begins in earnest after the agreement is signed. Typically, it includes business planning, sales training, technical training, systems integration (if needed) and usually extends to marketing support, lead generation, co-selling and initial wins.

1 Keep in Mind Partner Onboarding is an Ongoing Process

Your partner onboarding process is exactly that — a process — that will last for weeks or months after your partner signs on the dotted line and before they become productive. Think "marathon," not "sprint." Partner onboarding not a single event, nor is it an isolated exercise; it's an integral part of your entire partner program and an essential tool for both short- and long-term goals.

2 Establish Simple & Repeatable Processes

Complexity is the enemy of the good when creating an easily replicable partner onboarding process. Our panelists for this piece cautioned against building a 90-step program unless absolutely necessary and encouraged automating as many steps as possible using a Partner Management Solution like ZiftONE™. "Strategy," "consistency" and "repeatability" were commonly cited watchwords.

3 Designate Onboarding Process Responsibilities & Ownership

Select a point person, ideally a project manager, in your organization to manage onboarding for a given partner from start to finish. Establishing ownership eliminates confusion and creates accountability. And while that doesn't mean the burden of the entire onboarding effort falls on one person's shoulders, it can help keep the process moving and avoid delays.

4 Gauge Partner Focus & Alignment with Your Company

Prized partners are certainly out there, but outstanding sales performance doesn't happen magically. Instead, it takes focusing on key cooperative efforts — like

understanding each partner's focus, keeping open lines of communication and helping partner champions build alignment across their enterprise. Not every partner you recruit is going to be a fit, but that's okay; quality trumps quantity here.

5 Be Upfront About Your Solution's Strengths (and Weaknesses)

Your "innovative, ground-breaking, revolutionary" solution typically has plenty of competition. So help your partners understand how you compare and what sets you apart. Arm them with resources (including effective solution applications and use cases, industry verticals for the best fit, potential ROIs, etc.) with a special eye toward how you can help them win deals.

6 Provide Multiple Ways to Learn About Your Solutions

Keep in mind that people, including sales partners, don't learn in the same way or at the same pace. Some partners would rather attend live scheduled

Onboarding is an ongoing process. It is not a single meeting with partner leadership or a training session with their sales team that magically turns on the revenue stream.

Robert Maute
Former SVP of Channel Sales ■ Evolve IP

training, while others prefer to watch video tutorials or read product guides in your learning management system (LMS) on their own time. Still others are inclined to scour your partner portal and website for informative sales and channel marketing collateral. Making multiple options available to your partners will cover your bases, so experiment with different formats and delivery methods to hit on the best curriculum.

7 Work with Master Agents & Distributors to Collapse Timelines

Master agents and distributors often take on pre- and post-sales functions such as quoting, sales engineering, ordering, project management and installation for partners so they can shortcut some of the processes and start selling faster. Available to your partners will cover your bases, so experiment with different formats and delivery methods to hit on the best curriculum.

8 Monitor & Track Onboarding Performance & Feedback

No doubt your organization tracks CSAT scores, surveys customers and audits call center logs to ensure your customer-facing staff delivers top-tier service. Operate the same way with your partners. Besides sales, gathering metrics and data about how the partners interact with your staff, training and tools can be a leading indicator.

9 Remember to Be Human

When selling technology, it's easy to forget that your "solution" is not only a piece of software or hardware; it's also your people. And the character of your people can make or break the partnership. Our panelists reminded us of this important truism: People are only loyal to people. So when your people are pleasant and helpful, partners are more likely to want to work with your company (even if your technology is not best-in-class) and they're more likely to forgive an honest mistake on an order or install. On the other hand, if your team is difficult to reach or treats partners as second-class sellers, they'll leave even if your solution is the market leader.

Keeping these best practices top of mind while creating your channel partner onboarding process can put you a step ahead of your competition in building and maintaining revenue-generating partner relationships.

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