

P2P Maturity Model



A best practice framework for building your partner channel

More than ever, partnerships are essential to building total solutions, business growth, and winning against the competition. This self-assessment tool was designed to help you build successful partnerships.

-  **Joint Business Planning**
Joint business planning involves meeting with your potential partner and exploring business opportunities, identifying and discussing gaps in your company's offerings, and determining how your businesses best complement each other.
-  **Leads and Pipeline Assessment**
To build a business all organizations have processes to gather leads and build a pipeline. Before sharing your leads and pipeline it's important to trust the team you're sharing info with, and that you have leadership support.
-  **Agreements**
Formal agreements and contracts are a necessary part of any business relationship. It's best to document the relationship, expectations, and/or deliverables in writing, and to agree to what is documented.
-  **Sales Compensation**
For a partnership to be successful, it's important that the sales compensation model rewards the behavior you're driving to develop. Build compensation plans that motivate joint-selling motions and rewards partnering.
-  **Market Messaging**
Market messaging defines the public identity of a partnership. It's important to have a joint marketing plan that details events, timing, investment, and deliverables as well as defines areas of collaboration and ownership.
-  **Geography**
Partnering is a terrific way to expand your business's geographic reach. While the majority of business today is conducted electronically, don't underestimate the value of meeting face-to-face.
-  **Resource Utilization**
Assigning a Single Point of Contact (SPOC) is critical in moving to a dynamic partnering model. Having a key contact to resolve issues drives higher customer satisfaction, and stronger partner relationships.
-  **Readiness and Certification**
Assigning a Single Point of Contact (SPOC) is critical in moving to a dynamic partnering model. Having a key contact to resolve issues drives higher customer satisfaction, and stronger partner relationships.
-  **Product and Customer Support**
Partners need to identify, track, and resolve customer issues. Develop a shared CRM/PSA system to track customer issues, measure key performance indicators, and gain insights on training needs for both employees and customers.
-  **Customer Relationships and Satisfaction**
Developing long-standing customer relationships and measuring customer satisfaction are key ingredients to a successful business.



Joint Business Planning



If you answer, "Yes" follow the blue line. If "No" follow the gray line.

Start over



Do you have resources to manage and execute partnerships?

Yes

No

Does your company promote partnerships?

Yes

No

Do you have partnership inquiries?

Yes

No

Do you have a joint value proposition defined?

Yes

No

Do you have a Partnership Business Plan?

Yes

No

Have you agreed to conduct only opportunity-specific business?

Yes

No

Do you regularly meet to explore joint opportunities?

Yes

No

Are you generating joint account plans?

Yes

No

Do you share sales activities monthly?

Yes

No

Do you conduct annual executive briefings?

Yes

No

Have you created a "circle of trust" with your partners?

Yes

No

Develop a channel strategy and execution plan for managing partnerships.

Review the video "The Keys to a Successful Cloud Channel Program."

Review the video "Partner Recruitment Program."

Resources

["The Keys to a Successful Cloud Channel Program"](#)

["Partner Recruitment Program"](#)

Standardize on a Partner Business Plan and begin partnering activities.

Resource

[IAMCP website](#)

Identify an opportunity to give to your partner and leverage your "Winning with Partner Strategy."

Identify how you will work on joint opportunities; develop joint account planning and joint selling engagement activities; identify roles, responsibilities, and action plans.

Resource

[IAMCP website](#)

Set up annual executive briefings to measure and improve partnerships.

Resource

[IAMCP website](#)

Excellent - you are managing partnerships dynamically!

P2P Maturity Model Assessment Tool

Tally the number of Yes answers for your maturity assessment

0

Basic Maturity

1-3

Reactive Maturity

4-5

Proactive Maturity

6+

Dynamic Maturity

Leads and Pipeline



If you answer, "Yes" follow the blue line. If "No" follow the gray line.

Start over



Do you receive partner leads at random?

Yes

No

Do you have a process for tracking partner opportunities?

Yes

No

Do you have buy-in from VP of Sales on both sides?

Yes

No

Is P2P an agenda item in your internal sales meetings?

Yes

No

Do you share leads with partners?

Yes

No

Do you share leads on an ad-hoc basis with no structure?

Yes

No

Is there a lead sharing process and easily available?

Yes

No

Do you have a formal process for sharing leads?

Yes

No

Do you have a joint sales process?

Yes

No

Do you jointly share demand generation programs?

Yes

No

Do you have regularly scheduled pipeline account reviews?

Yes

No

Do you have an automated system to track channel leads?

Yes

No

Create a way to track and manage incoming partner leads.

Ensure you have a way to track leads received from partners and a process to share leads with partners.

Resource

Sales Lead Form Template - [IAMCP website](#)

Ensure your leadership team is fully engaged and has visibility.

Develop a lead referral program to promote joint selling opportunities.

Resource

[IAMCP website](#)

Leverage the Pipeline Report and set up a recurring meetings to review joint opportunities/leads.

For joint Microsoft opportunities, include your leads on Partner Sales Exchange when appropriate.

Consider building out joint sales engagement models and joint go-to-market campaigns to drive new leads.

Resource

[Partner Sales Exchange Portal](#)

Build out integration to submit, track and report joint leads into your CRM system.

Evaluate how Microsoft Dynamics CRM Online can help you automate your demand generation and customer relationships.

Resource

[Microsoft Dynamics](#)

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Agreements



If you answer, “**Yes**” follow the blue line. If “**No**” follow the gray line.

Start over



Do you have a basic Partner Non Disclosure Agreement (NDA) template?

Yes

No

Do you have a standard Mutual of Understanding Agreement (MOU) template?

Yes

No

Do you have a standard Partnership Agreement in place?

Yes

No

Is it fair in both directions?

Yes

No

Do you have a Master Services Agreement for Partners?

Yes

No

Do you have a Subcontractor Agreement?

Yes

No

Do you have a Support Agreement which outlines Service Level Agreements?

Yes

No

Always work with your internal legal team before developing contracts.

Formalize a standard partner NDA agreement to avoid delays.

To begin initial agreement conversations, leverage the Discussion and Questions for Partnering Document.

Resources

Partner NDA Agreement Template

Discussion and Questions for Partnering Document

[IAMCP website](#)

Download MPN Agreement for reference.

Resource

[IAMCP website](#)

For info go to Microsoft Services.

Resource

[Access Master Services Agreement](#)

Watch the “Legal Issues” training module.

Resource

[Legal Issues](#)

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Sales Commission



If you answer, "Yes" follow the blue line. If "No" follow the gray line.

Start over



Does your sales plan drive a partner joint selling environment?

Yes

No

Do your sales people understand how they can get paid for partnering?

Yes

No

Are they paid well also for P2P?

Yes

No

Is there a clear compensation plan developed to drive joint selling activities?

Yes

No

Is it aligned with your partners?

Yes

No

Have you "monetized" an average deal compensation?

Yes

No

Can your sales team earn money through selling: software, hardware, services?

Yes

No

Have you automated your partner sales compensation into your CRM?

Yes

No

Do you offer Sales Performance Incentive Funding (SPIF)?

Yes

No

Do you provide a P2P revenue tool?

Yes

No

Have you developed an internal award process?

Yes

No

Explore how Microsoft provides incentives to partners on MPN.

Resource

[Microsoft Incentives](#)

Leverage training "Driving Profitability with an Optimal Sales Model."

Resource

[Driving Profitability with an Optimal Sales Model](#)

Leverage the training and tools provided in the Cloud SureStep: Path to Maximizing Profitability.

Resource

[Cloud SureStep: path to maximizing profitability](#)

Gain insights provided on the "The Keys to a Successful Cloud Channel Program" video.

Start today to create your partner incentive programs.

Resource

[The Keys to a Successful Cloud Channel Program](#)

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Market Messaging



If you answer, “**Yes**” follow the blue line. If “**No**” follow the gray line.

Start over



Can partners find you on Microsoft Pinpoint?

Yes

No

Provide an overview of your company and solutions so partners can find you.

Resource

[Microsoft Pinpoint](#)

Do you have a partner marketing strategy and plan?

Yes

No

Do your business cards highlight also your partners?

Yes

No

Reference Driving Profitability with an Optimal Marketing Strategy training on the Learning Portal.

Resource

[Driving Profitability with an Optimal Marketing Strategy](#)

Does your marketing plan include joint partner go-to-market campaigns?

Yes

No

Do you have a standard partner “Bill of Materials” BoM?

Yes

No

Explore and leverage Ready to Go Marketing and Logo Builder.

Resource

[Ready to Go Marketing](#)

Do you offer co-branding opportunities for your partners?

Yes

No

Do you offer Marketing Development Fund (MDF) to your partners?

Yes

No

Leverage Microsoft Go-to-Market Services; Azure “Events in a Box” and the Sales Accelerator Toolkit.

Resource

[Microsoft Go to Market Services](#)

Do you have a partner portal for partner allowing them easy access to marketing materials?

Yes

No

Leverage the training and tools provided in the Cloud SureStep: Path to Maximizing Profitability.

Resource

[Cloud SureStep - Marketing](#)

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Geography



If you answer, "Yes" follow the blue line. If "No" follow the gray line.

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Do you only sell within a local geography because you have no sales reach?

Yes

No

Can working with partners in other geographies help you to serve customers that require global reach?

Yes

No

Do you have a plan developed to grow new revenues outside of your local area?

Yes

No

Have you identified new geographies where there is "white space" for your offerings?

Yes

No

Have you researched your market and identified areas where you can provide something unique?

Yes

No

Have you tried to narrow down exactly which geographies you want to go to?

Yes

No

Have you identified new geographies where there is "white space" for your offerings?

Yes

No

Can working with partners in other geographies add value or deliver additional skill sets?

Yes

No

Do you struggle with multi lingual marketing and sales?

Yes

No

Do you need help to localize your software and services?

Yes

No

Do you provide partner support in various geographies?

Yes

No

Develop an international channel strategy and execution plan.

Resources

[Review the video "The Keys to a Successful Cloud Channel Program"](#)

[Selecting-Target-Markets-for-Your-Cloud-Solution](#)

[Review the video "Partner Recruitment Program"](#)

Begin networking and building partnerships:

- Find IAMCP Chapter Meetings in your region.
- Attend Regional Microsoft Events and Community events.
- Participate in industry events.
- Be sure to attend the Worldwide Partner Conference.

Resources

[IAMCP website](#)

[Microsoft Community on MPN](#)

[Worldwide Partner Conference](#)

Leverage Pinpoint to find partners that can help you.

Resource

[Microsoft Pinpoint](#)

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Resource Utilization



If you answer, "Yes" follow the blue line. If "No" follow the gray line.

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Do you form account teams with people from both your company and your partners' companies?

Yes

No

Do you offer shared technical resources?

Yes

No

Have you tried to really narrow down what type of skill sets you should have in-house?

Yes

No

Do you have integrated resource planning?

Yes

No

Do you have an established sub contractor rate card that goes both ways?

Yes

No

Have you determined which people should be employed by your partners if they do not have your strategically desired skill sets?

Yes

No

Do you help out with bench sharing within your "circle of trusted" partners?

Yes

No

Build out a joint sales and technical capacity and resource plan.

Resource

Practice Plan Template

[IAMCP website](#)

Establish pricing through subcontracting rate cards specific to geographies.

Resource

Example of subcontracting rate sheet

[IAMCP website](#)

Take regular inventory of skill sets, identify gaps, and take action to meet future requirements.

Resource

Skills Inventory Assessment

[IAMCP website](#)

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Readiness and Certification



If you answer, “Yes” follow the blue line. If “No” follow the gray line.

Start over



Does your company advocate and provide training to your employees?

Yes

No

Do you leverage the Microsoft Learning Center?

Yes

No

Is there an easy way for your partners to obtain training?

Yes

No

Do you have partner training materials? Do you offer hands on training? Online training, classroom training?

Yes

No

Do you provide regular partner training?

Yes

No

Is there a partner training curriculum documented?

Yes

No

Have you strategically looked at training together with your partners so that you optimize who gets trained?

Yes

No

Do you have a Learning Management System to leverage partner training?

Yes

No

Do you offer partner demos and if needed a demo/lab environment?

Yes

No

Do you have a “certification” program?

Yes

No

Does your CVs have the same look and feel as your partners’ CVs?

Yes

No

Do you procure training together with your partners in order to optimize cost?

Yes

No

Leverage training via the Partner Learning Center to train your employees, join technical communities, read blogs, and attend technical conferences. Once you have a core set of training and readiness materials developed, build out your partner training content materials.

Resource

[Microsoft Partner Learning Center](#)

Consider working with a Microsoft Learning Partner to assist you in developing a comprehensive partner training program.

Leverage Pinpoint to find a training partner.

Resources

[Microsoft Learning](#)

[Microsoft Pinpoint](#)

Consider investing in automating your training offerings through a Learning Management System.

Resource

[Microsoft Learning Center provides certifications and exam training](#)

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Product and Customer Support



If you answer, "Yes" follow the blue line. If "No" follow the gray line.

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Is Partner support as important as your customer support?

Yes

No

Have you created service offerings specific for partners?

Yes

No

Do you have SLA agreements with your partners?

Yes

No

Do you offer tiered support offerings for partners?

Yes

No

Do you have defined customer support service level agreements?

Yes

No

Do you offer maintenance agreement for upgrades, fixes, bugs etc.?

Yes

No

Do you have a Single Point of Contact (SPOC) for partner support issues?

Yes

No

Do partner support issues work within your trouble ticket system?

Yes

No

Have you identified a process for how to identify/resolve issues together?

Yes

No

Do you have regular scheduled support meetings?

Yes

No

Do you share the same CRM?

Yes

No

Develop a Support and Services Plan for your partners.

Resource

[Microsoft Services](#)

Explore how to offer the same Service Level Agreement to your partners as you do your customers.

Resource

[Microsoft Services](#)

Go to Pinpoint to find a partner that offers PSA solutions.

Resource

[Microsoft Pinpoint](#)

Consider working to integrate your partner support systems within your internal systems.

Resource

[Microsoft Dynamics CRM](#)

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Customer Relationship and Satisfaction



If you answer, "Yes" follow the blue line. If "No" follow the gray line.

Start over



Do you have a standard set of customer satisfaction survey questions established?

Yes

No

Do you have a standard customer survey process in place?

Yes

No

Are you only dealing with CSAT when brought to your attention via the client?

Yes

No

Do you proactively survey your customers on their satisfaction?

Yes

No

Are you taking actions based on customer satisfaction reviews?

Yes

No

Do your partners and you share ownership of customer satisfaction?

Yes

No

Do you have a joint process to measure customer satisfaction?

Yes

No

Is there a clear line of responsibility as to who owns customer satisfaction?

Yes

No

Do you review survey results analytics to improve customer satisfaction?

Yes

No

Is your customer satisfaction survey automated?

Yes

No

Leverage the Microsoft survey questions and sample letter developed for customer references.

Resources

[MPN Gold Competency Requirement](#)

[Share a sample document](#)

Leverage the Microsoft Customer Satisfaction Tool (CSAT).

Resource

[Microsoft Customer Satisfaction Tool \(CSAT\)](#)

Develop a strategy to measure and execute joint customer satisfaction. Maximize your efforts by using the CSAT Tool.

Resource

[Microsoft Customer Satisfaction Tool \(CSAT\)](#)

Develop a process to measure customer satisfaction and leverage the CSAT tool.

Resource

[Microsoft Customer Satisfaction Tool \(CSAT\)](#)

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