

Tech CEOs: Evolve Your Systems to Better Enable Channel Partners

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Initiatives: [Marketing and Sales Execution for Tech CEOs](#)

Tech CEOs must implement online systems such as partner portals or PRM systems to efficiently deliver the program information vital to partner onboarding, training and sales execution. By providing ready access to key information, online systems increase channel partners' overall productivity.

Overview

Key Findings

- Many emerging providers fail to proactively support their partners, expecting them to call or email for information or enablement materials when needed.
- Well-constructed online systems, including partner portals and partner relationship management (PRM) applications, reduce partner frustration, improve responsiveness and increase partner productivity and engagement.
- Emerging providers often struggle to decide whether they should start with homegrown partner portal functionalities or invest in PRM applications.

Recommendations

To improve customer acquisition when embarking on a channel partner strategy, tech CEOs and the teams responsible for marketing and sales execution should:

- Implement an online resource for partners by creating a secure environment accessed through the company website. The online environment should reinforce the partner value proposition and provide the basic elements of sales training, marketing material and a description of the partner program.
- Improve the functionality of the portal by introducing deal registration, business planning capabilities and role-based marketing content.

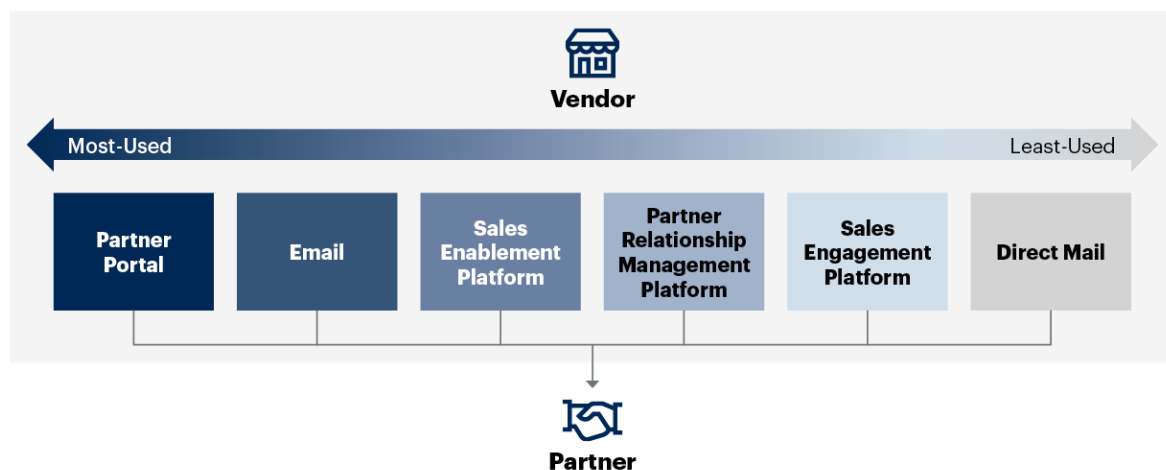
- Evaluate the need for a PRM system to complement the partner portal by factoring in revenue through partners, number of partners and geographical coverage in calculations.

Introduction

Partners expect enablement, marketing materials and other partner program benefits to be readily available online. The online tools used for the distribution of important information to partners include PRMs, sales enablement platforms and sales engagement platforms (see Figure 1).

Figure 1: Channels of Distribution of Sales Enablement Materials to Partners

Channels of Distribution of Sales Enablement Materials to Partners



Source: Gartner
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Gartner.

As part of the partner program planning process, tech CEOs should prioritize the development of a partner portal as an integral step to provide online resources for partners. As the number of partners and distributors around the globe increases, tech CEOs should further invest in the portal and perhaps augment it with other online applications, such as a full PRM suite.

Analysis

Step 1: Implement a Comprehensive Portal for Partners

To optimize a partner's program experience, tech CEOs must ensure that their partner portals offer the following key capabilities and features:

- **Secure login** — Ensure the partner portal is only accessible to registered partners and that it uses permissions to determine the content that is available to them.
- **Partner onboarding** — Create a channel partner onboarding guide. Organize content that includes a partner program overview session, starting with the benefits to partners, detailing the enablement programs, infrastructure systems and rules of engagement.
- **Partner program description, features and requirements** — Outline the partner program for partners to reference, especially those program features that enable partners to optimize customer-facing components that generate or retain revenue, such as marketing, sales and product support.
- **Sales and marketing enablement material** — Provide a partner “how to sell” guide or certification process. They may be expert sellers, but partners need guidance on how to position your product and ask the right questions to qualify the opportunity. Supplement this guide with further materials for the partners’ presales engineers. For instance, provide a feature or benefit chart so that the partner can position the technical capabilities of the product with the business benefits that the prospect will obtain. Provide reference to relevant sales enablement curriculum, content and data research. You must show how you support the partner’s sales capabilities.
- **Technical, implementation and delivery enablement material** — If you are expecting the partners to deliver services around the product, provide them with technical documentation, including blueprints, user manuals and other pertinent documents. This material should supplement the training given to the partners.
- **Operations enablement material** — Make partner contract data, fees and legal data available to key stakeholders. Any applicable fee structure, deal structure and customer contract information should be readily available as well.
- **Customer support and management information** — Provide phone numbers, contact details and other relevant information to accommodate the partner’s marketing, sales, technical and program-related questions.

In addition to accounting for the list of essential capabilities and features in the partner portal, tech CEOs should think about how they organize the supporting content. As Table 1 illustrates, content can be easily organized (and discovered) according to the partnership functions it enables.

Table 1: Partner Portal Content Organization

(Enlarged table in Appendix)

| Partnership Function | Description |
|------------------------------|--|
| Onboarding | Enable self-service channel partner onboarding to guide and organize content that includes an overview detailing the enablement program, infrastructure systems and rules of engagement. |
| Marketing | Enable partners to easily find marketing material and content, marketing enablement and joint content calendar. |
| Sales | Enable partners to easily find sales playbooks, battle cards, sales processes, sales enablement, training and certifications. |
| Technology | Enable partners to easily find technical documentation, integration and product specifications. |
| Implementation and delivery | Enable partners to easily find training, product implementation guides, service delivery material, integration guidelines and certification. |
| Support and customer service | Enable partners to easily find support guidelines, customer service information, contact information and service and support material. |
| Operations | Enable key stakeholders' access to contract data, fees and fee structure, legal data, and customer and partner contract information as applicable. |

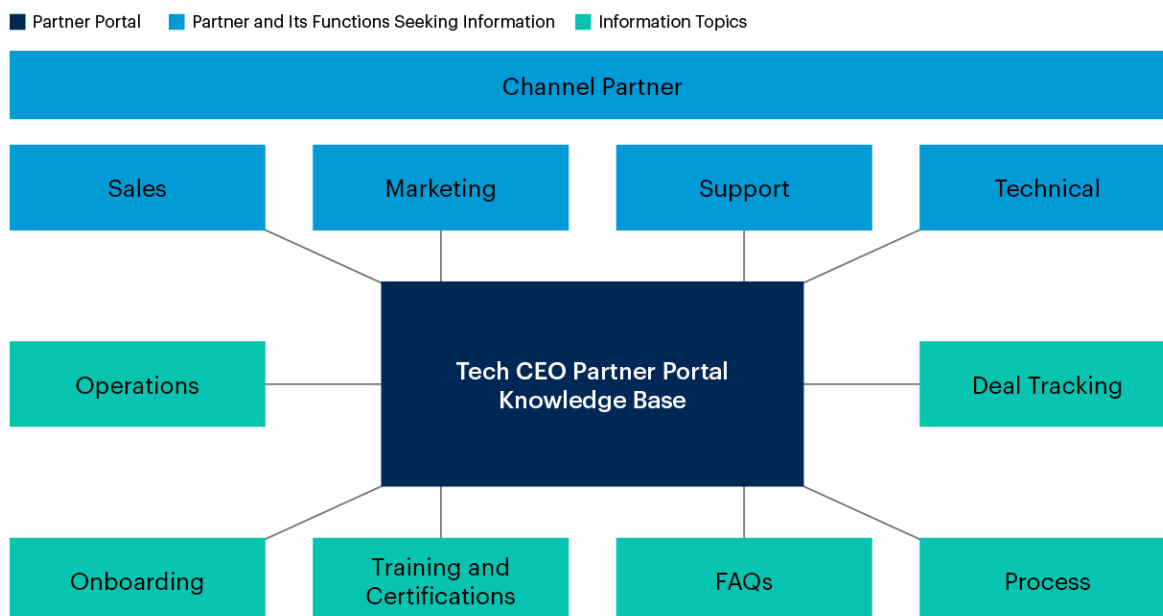
Source: Gartner

Step 2: Enhance Partner Portal Functionality

Once a basic partner portal has been implemented, tech CEOs should enhance the portal over time via comprehensive and complementary features for both partners and internal teams. For example, as partners log in and are identified appropriately, permissions can be used to determine what access they have to which content or training material. Access control and permissions designate the content specific to that partner or role within the partner functions or applications (see Figure 2).

Figure 2: Partner Portal Components

Partner Portal Structure Based on Login Credentials



Source: Gartner
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Gartner

Use Partner Portals to Streamline Requests and Reduce Workloads

Although partner enablement efforts expand reach and revenue opportunities for technology and service providers, tech CEOs are often overwhelmed by the volume and effort of delivering enablement content to partners. Tech CEOs must streamline content enablement and requests for content in order to reduce their partner management workload and improve partner content usage.

Tech CEOs should use partner portals as the first line of support in partner relationships. That said, always send a link versus sending a document to enable content consumption tracking, which will inform future content decisions.

Partner portals will significantly reduce the demand placed on channel program teams. Partner portals should also be used to collect individual requests, as individual requests will still appear, despite having a structured request collection process. However, the key to minimizing customized content creation is to gather information on similar request types to deal with them at the same time.

Organize and Align Content to Partner Needs

It's imperative that tech CEOs enable their teams to collect data from the portal to categorize key partner requests, such as:

- Who (that is, which role) from the partner organization is downloading?
- How often are they (sales, marketing, technical) visiting the portal?
- Which product type and version are partners reviewing?
- Which internal or external content is the partner consuming?
- Who is getting trained?
- Who is getting certified?
- Are partner salespeople updating their sales presentations?

Above all, expectations must be set with partners on the speed of delivery. When partner information is organized by content type, and permissions ensure partners are directed to the right touchpoint in the organization, they're immediately directed to resources curated for them versus having to sift through everything (see Figure 2). They also do not have to wait for an email to get an answer. It is important to note that not all partner portal systems are created equal; some will need support from learning management systems (LMSs) or content management systems (CMSs) to fully enable partner engagement.

Explore Generative AI Opportunities

Generative AI (GenAI) is becoming a powerful application to improve partner enablement programs. Using GenAI models in partner portals or PRM systems allows businesses to personalize partner journeys resulting in a much stronger partner experience.

A key benefit of using GenAI in partner enablement systems is segmentation based on the partner's needs, interests, vertical region or preferences.

GenAI can create new content, follow up and make recommendations including tracking and monitoring deal flow and vendor alerts on sales motions. GenAI also may be used to develop personalized sales and technical training courses and certifications, ensuring better-qualified partners and reducing the content load on the company.

Step 3: Evaluate the Need for a Partner Relationship Management System or PRM Applications

There is only so much that can be incorporated into a partner portal before its use case reaches its maximum functionality without incurring high development costs, which can potentially outpace the cost for an off-the-shelf PRM system. An alternative is to supplement the partner portal with a PRM system (see Note 1). In some cases, the PRM will take over the duties of the partner portal. Table 2 shows the features included within most PRM systems.

Table 2: Common Functions of PRM Systems

| PRM Systems | Description |
|-------------------------------|---|
| Partner master data | Partner profiling and identification, partners' prospects, contract details, product selling permissions, access rights, program conditions and account management |
| Partner life cycle management | Partner locator, partner recruitment, partner onboarding, partner incentives, partner training and certification, partner territory assignment and joint business planning |
| Channel partner marketing | Content management, partner portals, collaborative marketing, lead nurturing, deal registration and market development funds |
| Channel sales execution | Forecasting; collaborative lead management; opportunity management; sales configuration; proposal generation; order and product tracking; configure, price and quote (CPQ); quotation management and order management |
| Channel partner service | Individual partner reporting, returns and warranty management, approval management and escalation management |
| | |

Source: Gartner

How to Evaluate the Need for PRM

Table 3 provides a set of evaluation criteria when deciding to either extend a partner portal or supplement it with a PRM.

Table 3: Evaluation Criteria for Implementing PRM Versus Extending the Partner Portal
(Enlarged table in Appendix)

| Partner Management at Scale | Reason to Use PRM |
|---|--|
| The plan is to have more than 50 partners within three years. | Numerous partners means manual tracking of partner performance could overwhelm current resources. |
| Additional program features are planned to enhance value to partners. | Such program features as marketing development funds need to be managed and tracked. |
| Partner contribution to revenue becomes significant (more than 15%). | If partner contribution to revenue becomes significant, forecasting revenue through opportunity registration becomes critical for business health. |
| Integration with other internal IT systems becomes imperative to improve automation and reduce administration. | PRM can act as an integration hub for internal systems, such as CRM, ERP and CPQ. |
| Internal processes are put in place to measure partner-facing team performance based on partner performance. | PRM can provide tracking systems so that partner performance can be measured and partner-facing teams can be rewarded on performance. |
| Expertise is needed to enhance online support for partners. | PRM vendors have implemented hundreds of systems and will implement features into their products that have been proven to enhance partner experience and usefulness. |
| Further partner portal enhancements will cost more than implementing a PRM or will drag employees away from more important tasks. | Budgets need to be carefully managed within an emerging company. Implementing a packaged solution may make long-term financial sense. |

Source: Gartner

Evidence

This research is based upon a wide variety of primary and secondary data sources including inquiries with technology providers, published financials, personal observations and provider interviews. The positions outlined and opinions expressed were formulated over an extended period of time to ensure that scenarios were able to play out and hypotheses could be validated. All assumptions, conclusions and recommendations have been tested and refined in conjunction with members of Gartner's research community. This is to ensure that they comprehensively and objectively describe the major and minor trends affecting today's technology market, their effects on the provider community and Gartner's recommendations regarding how they should be addressed.

Note 1: Partner Relationship Management Systems

PRM is a combination of software, methodologies, best practices, templates and workflows that manage and automate the business processes and relationships between providers and their channel partners. Some refer to PRM as channel management or channel automation software. PRM is web-based and usually centrally hosted and delivered in the form of software as a service (SaaS) on a subscription basis. PRM systems most often offer partner portal functionalities, allowing companies to engage with their partners in a private mode or in a community style when addressing a group of resell partners. For a comprehensive set of capabilities for PRM vendors, see [Market Guide for Partner Relationship Management Applications](#).

Document Revision History

[How to Enable Partners as a Tech CEO: Partner Portal or PRM System? - 31 January 2022](#)

Recommended by the Authors

Some documents may not be available as part of your current Gartner subscription.

[Tech CEO Tool: Expand Indirect Channels as a Route to Market With Partner Finder](#)

[Market Guide for Partner Relationship Management Applications](#)

[Plan and Manage to Prevent Conflict Between Direct and Indirect Sales Channels](#)

[Tool: Joint Business Planning With Indirect Channel Partners](#)

[Tech CEOs: Attract Partners by Pitching a Stronger Value Proposition](#)

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