

# IBM Customer Success

Engaging the Partner Ecosystem

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# Today's Discussion Leaders



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# Today's Agenda

- Check your knowledge
- CSM engagement across each partner sales motion
- Find out if a partner is working with your customer
- Working with the IBM Ecosystem team
- Common concerns and what to do

[WWW.MENTI.COM](http://WWW.MENTI.COM)

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\*All questions from *Partner Sales Foundations*.  
*Course can be found in CSM U.*



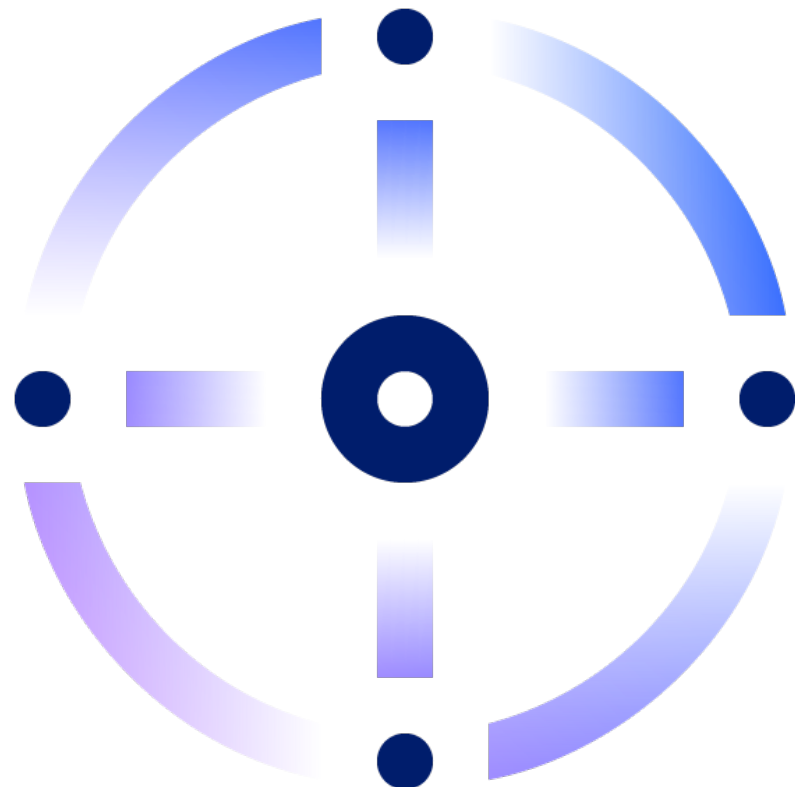
New model focuses on the **sales motions** for all Partner types

❖ Whether the partner is a GSI, ISV, VAR , Cloud services provider or Distributor, every Partner type can engage in several motions. *For example, a services / implementation partner can also sell a packaged application that they sell to their customer base!*

❖ Partners are categorized in multiple tiers. Depending on the tier, they will have either dedicated or assigned sales coverage in the markets. Partner Tiers detail and examples

Build

Partner builds solution using IBM technology to sell to customers, some of whom are IBM customers

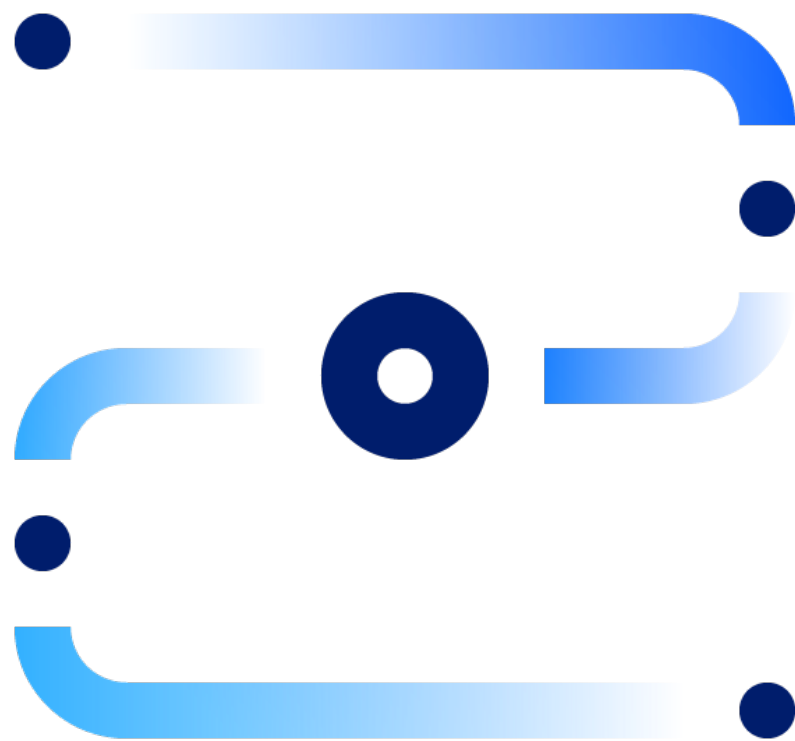


Typically, ISVs are Build partners but may also access resources for Service and Sell motions as needed



Service

Partner develops and sells a value-added service using IBM technology



Typically, GSIs, MSPs/TSPs are Service partners but may also access resources for Build and Sell motions as needed



Sell

Partner sells solution built on IBM technology or resells IBM technology to customers, some of whom are direct IBM customers



Typically, VADs/VARs are Sell partners but may also access resources for Build and Service motions as needed



# CSM engagement in the Partner Ecosystem by different scenarios

## Partner Scenario



### Build

Partner builds solution using IBM technology to sell to customers, some of whom are IBM customers



### Service

Partner develops and sells a value-added service using IBM technology



### Sell

Partner sells solution built on IBM technology or resells IBM technology to customers, some of whom are direct IBM customers

CSM Focus	Ensure the partner unlocks the full value of IBM technology within the solution build	Ensure the partner successfully delivers IBM technology for the customer solution	Ensure the customer successfully deploys the IBM technology
Who Owns Entitlement?		Customer, unless part of a packaged solution from partner	Customer
Who Works with the Customer?	Partner	Shared (Partner and CSM)	Typically, the CSM
CSM Assignment	Assigned to the partner	Assigned to partner or customer (depending on who owns the entitlements)	Assigned to the customer
Typical Activities	<ul style="list-style-type: none"><li>• Drive architectural design and configuration decisions for the market-ready solution</li><li>• Assist the partner during the build to implement best practices and overcoming technical hurdles</li><li>• Identify opportunities to expand future footprint</li></ul>	<ul style="list-style-type: none"><li>• Assist the partner throughout implementation of the solution</li><li>• Guide customer through architectural and configuration decisions of the deployment, recommending best practices</li><li>• Address implementation challenges (e.g., troubleshooting, debugging)</li></ul>	<ul style="list-style-type: none"><li>• Develop and prioritize use cases that align to customer goals</li><li>• Influence customer to select IBM technology and ensure they utilize its full capabilities</li><li>• Guide customer through architectural and configuration decisions of the deployment, recommending best practices</li><li>• Assist the customer throughout MVP and/or implementation</li></ul>

# CSM engagement in the Partner Ecosystem by different scenarios



## Build

Partner builds solution using IBM technology to sell to customers, some of whom are IBM customers



## Service

Partner develops and sells a value-added service using IBM technology



## Sell

Partner sells solution built on IBM technology or resells IBM technology to customers, some of whom are direct IBM customers

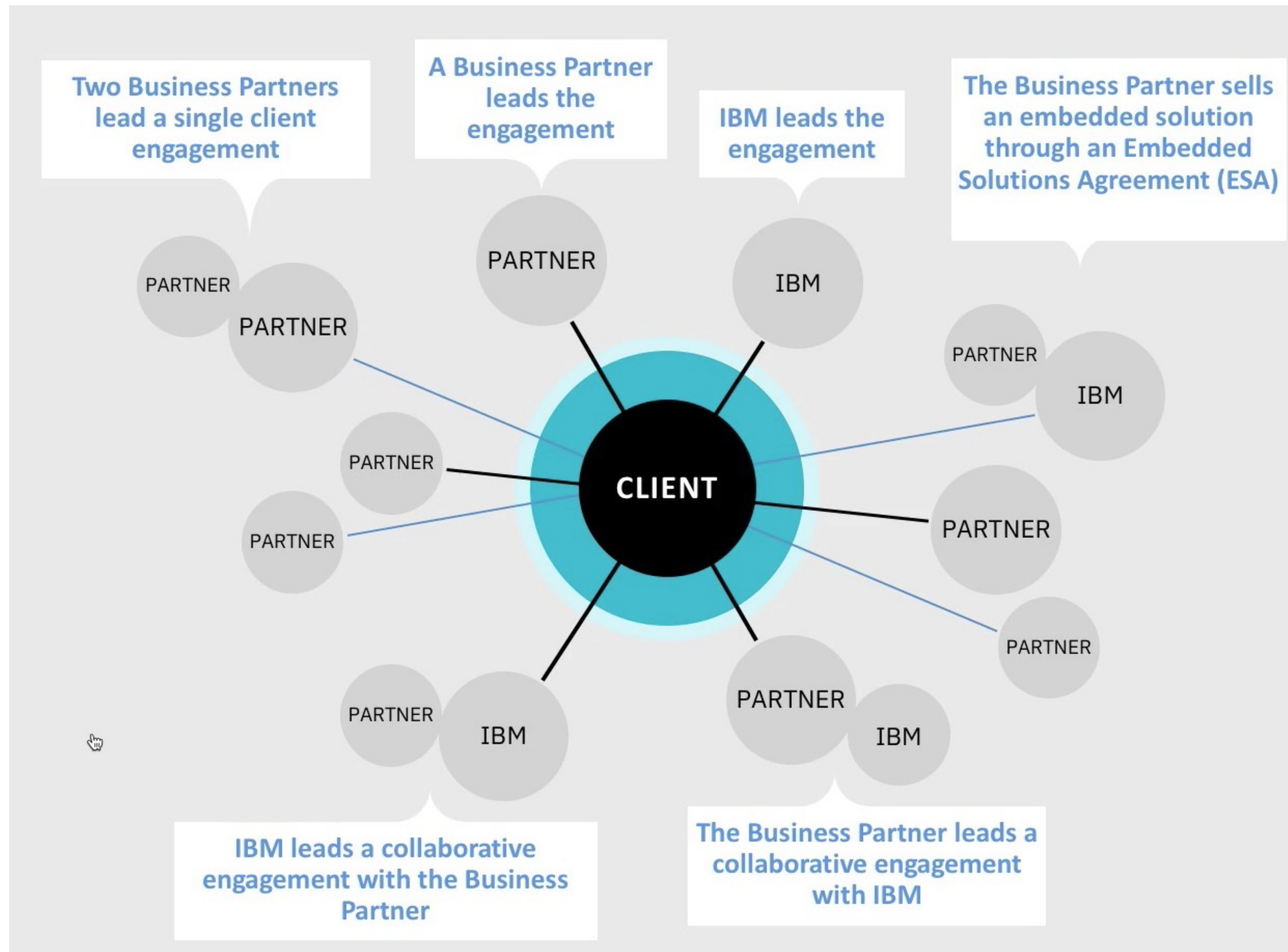
### Partner Scenario

### How to get started

- |                    | Build                                                                                                                                                                                                                                                                                                                                                                                   | Service                                                                                                                                                                                                                                                                                                                        | Sell                                                                                                                                                                                                                                                                                                                                                                    |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| How to get started | <ul style="list-style-type: none"><li>• Align with TPS/TPA to understand the partner's business focus and technology landscape</li><li>• Engage with the partner to help them move forward with the solution development</li><li>• Where needed, work with the Hybrid Cloud Build Team &amp; GSI Lab to support the partner with build and/or migration and assist with MVP's</li></ul> | <ul style="list-style-type: none"><li>• Engage with the sales team to understand if a services or implementation partner is involved</li><li>• Align with the TPS/TPA to connect with the partner and discuss the value of CSM</li><li>• Work alongside with the partner on the customer's successful implementation</li></ul> | <ul style="list-style-type: none"><li>• Before engaging with the customer for new entitlements, check Atlas &amp; Fastpass to determine whether a partner sold the entitlement</li><li>• Align with the TPS/TPA to connect with the partner and discuss the value of CSM</li><li>• Work alongside with the partner on the customer consumption and deployment</li></ul> |



# Relationships vary by partner and customer



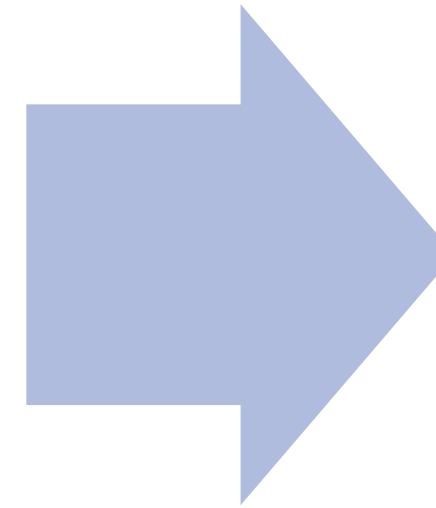
Reach agreement early on how you will engage in service to the customer.



# Is there a partner at my account? Maybe!

1

Check Gainsight entitlement details for the Distribution Channel Code



2

Validate with the IBM team (sales or ecosystem team)

If the code G,H,J,K, M, a partner is involved with your customer in some way.

K suggests a Build relationship and your account IS a partner.

G or M suggests a Service relationship.

For codes G,H,J,K, M, Gainsight will show the name of the Value-Added Reseller (VAR) and their CEID.

New!

If the code A, this is IBM direct sales. But that doesn't mean there isn't a partner. Check with the account team and ask.

Ask whether and how partners are engaged in your account.

If a direct sales team, be sure to ask if the customer has contracted with a partner for implementation services outside of IBM.

If your customer is a Build partner, work with the TPS and TPA to get background and discuss your role.

If your account is a GSI, work with the TPS to understand how the entitlements are expected to be used. (internal or customer)

# Gainsight & Partner Information

Launched 4 May 2021... CEID/VAR name added to Entitlement Details

Entitlements | R360: Active Su...

Wrap lines

Sales ...	A...	Ramp...	Contract St...	Next Rene...	Renewal St...	Renewal End	Renewa...	Renewal Descri...	Qty	Part #	Descr...	Billin...	DBGID	ICN	Site ID	Dist Chnl	Dist C...	VAR_...	VAR_NAME	GBGID
77429944	194,620		12/31/2020	12/31/2023			R													

Dist Chnl

Dist Chnl Code

VAR\_CEID

VAR\_NAME

Distributor

J

9q63y

Converge Acquisition LLC

Dist Chnl – Label associated with the Code

Dist Chnl Code – Code that signifies the how revenue is recognized across the various channels

VAR\_CEID – The ID of the partner that sold the entitlements to the customer

VAR\_NAME – The name of the partner that sold the entitlements to the customer

The VAR Name and CEID is from DSW at the line item level. Some clients have multiple Resellers, so this allows you to see which line items were sold by which Reseller. VAR Name and CEID will update on the same cadence as our current OnPrem DSW entitlement data — currently daily for Subscription License and weekly for Perpetual. This applies to Channel Codes J, H, K, G, M. Channel Codes A, B, C, E and Z indicate the entitlement was sold direct.

## Coming soon!

- Decode the Distribution Channel Code
- Add partner indicators/filters to leader dashboards for better prioritization and decision making

\*CEID is assigned to companies that have partner agreements with IBM.

# Meet the Ecosystem team

5 core Ecosystem roles you need to know:

Your main contacts within IBM Partner team to work with

**IBM Technology Partner Seller (TPS):** Drives sell-to and sell-through revenue across IBM brands within a named set of partners

**IBM Technical Partner Architect (TPA):** Shapes partner’s technical agenda toward IBM’s offerings, with a skew toward Growth offerings

**Partner Recruitment Leader (PRL):** Drives recruitment and onboarding of targeted new partners, measured on revenue growth with new partners

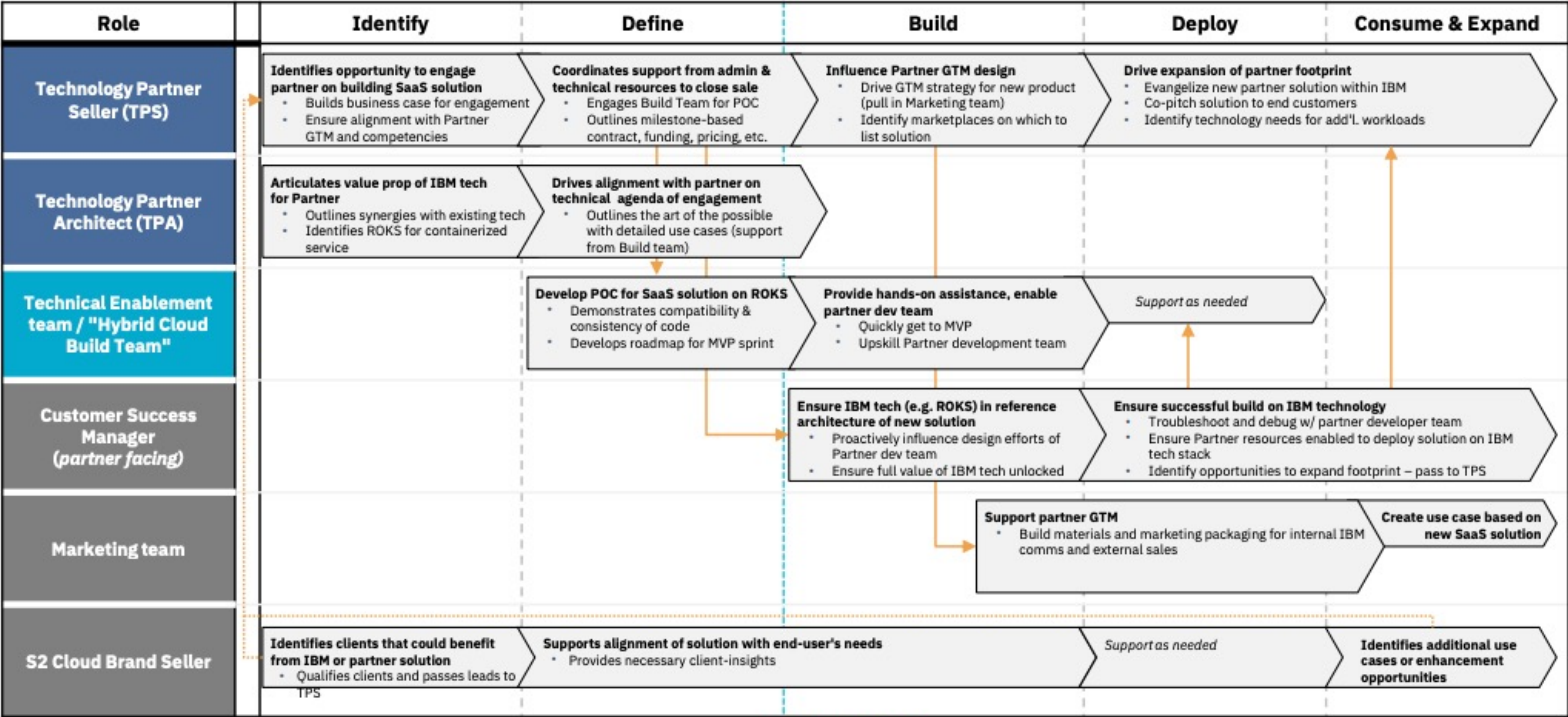
**Ecosystem Technical Teams (Hybrid Cloud Build Team & GSI Lab):** Project-based teams helping partners build and/or migrate solutions to IBM hybrid cloud and other technologies

**IBM Brand Sales Partner Specialist (BSPS):** Covers a territory of customers and identifies and passes leads to partners

Responsible for creating a hyper-local partner ecosystem to improve productivity within the first line manager territory



# Build example: Partner (ISV) building SaaS solution on ROKS



◆ Contract signed



# Deeper Dive into TPA and CSM Collaboration

## TPA

- Shapes partner's technical agenda toward IBM's 'Growth' offerings.
- Enables partner's technical capability, both pre-sales and delivery to ensure productive use of IBM technology.
- Drives partners to adopt IBM technology as the basis for solutions & as part of their reference architectures.

## CSM

- Engages post-sale to help partners who have bought IBM technologies to embed in their own solutions or customers serviced by a partner to leverage the full capabilities and value.
- Applies best practices, addresses technical barriers, accelerates time to value, and ensures consumption/renewal.

### BUILD

Work with TPS on overall strategy, set vision for ‘Growth Offerings’ in the solution build.  
May engage HCBT for POC or MVP.  
Ensure technical hand off to CSM, where assigned.

Ensure vision is realized through successful implementation of growth offering in partner solution.  
Help partner fully leverage technology, addressing technical hurdles during build. Collaborate with HCBT, if engaged.  
Help partner stay abreast of new release capabilities and impact on solution.  
Identify opportunities to grow and expand partner investment (progressed by TPA).

### SERVICE

Influence and develop partner capabilities in ‘Growth Offerings’.  
If partner has purchased catalog for use with end customers, TPA will work with partner to identify use cases and support their GTM.

Focus is on end customer solution delivery and ensuring customer receives full value of the technology. (CSM may be assigned to partner or customer depending on the entitlement ownership.)  
If partner has purchased catalog for use with end customers, TPA takes lead to drive the partner’s GTM. CSM monitors for customer engagement when identified.

### SELL

Enables the partner to sell (value and technical) ‘Growth Offerings’  
Support specific partner deals, as needed (with the goal of enabling partner to be self-sufficient)

Focus is on end customer solution delivery and ensuring customer receives full value of the technology. CSM assigned to end customer. Limited, if any, TPA/CSM interaction is expected.

# Partner programs to know about (as of 4/30/21)

1

## Ecosystem Investment - Cloud Engagement Fund (CEF)

The Cloud Engagement Fund invests in our Partners to drive innovation and skills around IBM's Hybrid Cloud and AI Platform. Funding available for **OpenShift, Cloud Pak & IBM Public Cloud** opportunities for all Ecosystem Partners



### Modernize with the IBM Hybrid Cloud

Offset costs associated with migrating workload to our platform



### Access new opportunities

Identify a target list of end-customers who are ready to move to the IBM Cloud, go to market with IBM support, and drive deal closure with funding for your end customer



### Drive success with consumption

The more IBM Hybrid Cloud partners and their customers consume, the more access to incentive funding they have.

### CSM may request support for:

1. Technical Migration Services  
IBM Resources or funding to support migration to the IBM Hybrid Cloud



2. IBM Cloud Credits  
Reduce infrastructure cost for partners or their end customers

[CEF Request Form](#)

2

### Partner Advocacy Program

- Pilot for GSIs (broader rollout 2H 2021)
- Meant to encourage use of IBM technology in partner-built solutions and delivered services (Build or Service motions)
- Aimed to reduce conflict among sellers and partners
- The partner holds the entitlements. Partner-assigned should determine whether customers are known and if there is a CSM assigned to that customer

3

### [Upgrade Acceleration for Partners](#)

- Enable and incent partners to help customers upgrade from point products to Cloud Paks & growth offerings at renewal
- Success of the program will result in more entitlements with emphasis on modernization from point products they may use heavily today
- CSMs will need to team up with partners and work with customers to help get them started



# Common Concerns and What to Do

Concern	Recommended Next Steps
I am not sure if there is a partner relationship with my customer.	<p>You may need to look in several places to put the picture together</p> <ul style="list-style-type: none"><li>• Gainsight: In the entitlement detail, you will see the “Dist Chnl” and “Dist Chnl Code” Most commonly, codes: G, H, J, K, M.</li><li>• Fast Pass: With the sales order number in hand from Gainsight, Fast Pass will show the Distributor and Reseller names and detail.</li><li>• Atlas/ISC: Fast Pass may have the opportunity number. If there is a partner owner, you can find detail in Atlas/ISC.</li><li>• Ecosystem Sales team: Once you’ve gathered information from above, it’s always a good idea to verify the contacts with your sales and ecosystem team and gain additional insight on the IBM/Partner relationship.</li><li>• Note: Just because a partner is not shown, does not mean there is not a partner involved with the customer. Customers may have separate contracts with partners for consulting or implementation services and we should try to discover and work with them as appropriate.</li></ul>
I have determined that my customer is working with a partner but I don’t know who to contact in the company.	<ul style="list-style-type: none"><li>• Start with the sales and ecosystem team that is covering your customer for the most appropriate contact.</li><li>• If there is no sales or ecosystem coverage, use Atlas/ISC to identify the Partner opportunity owner and contact.</li><li>• If you get stuck, reach out to @janebossert, @alanna or @metilton</li></ul>
The partner is not responsive or is blocking access to my customer so I am unable to determine a plan of action.	<ul style="list-style-type: none"><li>• Make sure the Partner understands your role and the value you bring, how you can help each other</li><li>• Seek out the Partner rep for help</li><li>• Seek support from your management team if needed</li><li>• It is not recommended to go directly to the customer without the partner’s agreement to avoid any channel tension.</li></ul>
The customer prefers to work with through their Business Partner with whom they have trusted relationship. How do I complement their efforts? Do I need to be involved directly with the customer?	<ul style="list-style-type: none"><li>• Make sure the partner and customer understand your role, the value you bring, and how you can help each other.</li><li>• It’s perfectly OK for the Business Partner to work with the customer directly. Many partners have deep expertise in our technologies and the customer’s industry. You and the partner may decide it’s best for you to work with the partner behind the scenes, if that is what the customer ultimately prefers.</li><li>• Discuss with your manager and, if you both agree the partner is addressing the needs, consider a reassignment to a customer or partner where you could have greater impact</li></ul>

# Common Concerns and What to Do (continued)

Concern	Recommended Next Steps
How do I know what skills the Partner has? Will they be on a path to successful implementation for the customer?	<ul style="list-style-type: none"><li>• Do your research. Find out what the IBM team knows about the partner’s focus. Search the Business Partner Directory on IBM PartnerWorld (<a href="https://www.ibm.com/partnerworld/bpdirectory/">https://www.ibm.com/partnerworld/bpdirectory/</a>). Review their web site and look at their customer references. Search for third-party reviews on sites such as Trust Radius or G2.</li><li>• Seek out the BSPS assigned to get proper alignment based on skills.</li></ul>
My customer is used to working with IBM directly but since our sales coverage has changed, they no longer have access to that sales relationship. They are being introduced to a new Business Partner.	<ul style="list-style-type: none"><li>• Make sure your customer understands your ongoing relationship.</li><li>• Seek out the BSPS to ensure alignment on the partner skills and needs of the customer.</li></ul>
The Partner skills are not adequate, or they are not implementing according to our best practices. How do I share feedback on the partner? Should I intervene and how? How do I help the partner improve?	<ul style="list-style-type: none"><li>• Discuss the situation with the partner to better understand the situation.</li><li>• Seek out and share IBM resources such as IBM Center for Cloud Training or IBM Knowledge Center documentation.</li><li>• Introduce them to other experts that may be able to assist (e.g., IBM Support, OM, Hybrid Cloud Build Team, GSI Labs, as appropriate) if they are in need and receptive.</li><li>• Discuss with the Ecosystem team (TPS if available) to share experience and recommendations</li></ul>
I need to find a partner for my customer with XXX skills (in cases where the customer prefers to NOT have GBS or IBM Services for whatever reason)	<ul style="list-style-type: none"><li>• The Business Partner Directory on IBM PartnerWorld (<a href="https://www.ibm.com/partnerworld/bpdirectory/">https://www.ibm.com/partnerworld/bpdirectory/</a>) is a good starting resource.</li><li>• Once you have reviewed, reach out to the BSPS to discuss plan next steps to engage.</li><li>• If no BSPS is aligned to your account, reach out to the Ecosystem sales leader in your market for guidance.</li></ul>

## Wrap Up / Key Takeaways

- There is a good chance that there is a partner working with your customer (or your customer IS a partner). Or will be in the future!
- Each relationship will be unique but keep in mind the partner will need to understand the role of the CSM and have trust before introducing you to their customer.
- Assure the partner that your goal is to help their customer be successful. That will lead to success for them and for IBM!
- Recognize that your partner has expertise as well. It's your combined expertise that will lead to success.



# Resources

- Complete the “Partner Sales Foundation” course on [CSM U](#)
- [Cloud Engagement Fund Request Form](#)
- [IBM Partner Ecosystem](#) w3 pages
- [Partner Ecosystem Geo Leadership Teams](#)

# Questions?

# THANK YOU