

VENDOR NEEDS AND STRATEGIES

Architecting Effective Partner Programs: An Assessment Tool for Continuous Improvement

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IDC OPINION

IDC believes software vendors must be prepared to invest in a new partner program model to more effectively leverage the value of their partner ecosystem. Software vendors such as Microsoft, IBM, Oracle, Novell, and Progress have already begun down this path. This trend requires a rethinking of silo programs that classify partners based on their type or activity. It means providing a modular, systematic, and systemic relationship structure that allows partners to self-select their place within the program via a selection of choices that are in alignment with their business requirements. Partners are being viewed in this new approach as strategic-thinking businesses that conduct multiple activities across customer decision cycles within one or more markets and industries. To assist its customers, IDC has developed this partner program self-assessment tool. By reviewing program characteristics against the elements and characteristics contained in this assessment, companies can understand the options and opportunities to improve their partner programs.

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1 IDC's Partner Program Model 1

IN THIS STUDY

This study provides a framework to assess a partner program construction and operations based on best practices IDC has identified. Vendors should use this document to compare their overall partner program approach with IDC's model.

The new partner program model sets out to correct or alleviate the issues evident in the typical partner program (see *Architecting Partner Programs for Success*, IDC #31612, July 2004). It segments and classifies all elements of a vendor's approach to systematically and systemically identifying, recruiting, managing, rewarding, and maintaining partners, as shown in Figure 1. This overall model neatly segments elements of the vendor/partner relationship so they can be reviewed and analyzed to determine what makes them function and reveal important trends and measurement criteria for success. Its advantages over other program structures include the following:

- ☒ More logical and durable than the traditional silo program strategy
- ☒ More capable of optimizing and targeting vendor investments to realize higher return in partners and infrastructure
- ☒ More seamless to the partner
- ☒ More capable of accommodating new and multidisciplined constituencies
- ☒ More capable of accommodating evolving partner business models

FIGURE 1

IDC's Partner Program Model



Source: IDC, 2004

Methodology

This review is divided into 10 sections:

- Core program
- Typology
- Support
- Infrastructure
- Marketing/communications
- Coverage model
- Training and certification
- Technology integration
- Tactical initiatives
- Vendor professional services

Each section includes from 2 to 11 tables that describe elements of a particular feature of that section. In the example below, Table 1 focuses on the "sandwiches" element of the "food" section.

TABLE 1

Food: Sandwiches — Example
 Q. *What are sandwiches?*

	Evaluation (circle all that apply)
• Our sandwiches contain peanut butter and jelly.	y n
• Our sandwiches often contain two pieces of bread.	y n
• Sandwiches are a staple for lunch and an occasional snack or dinner food.	y n
• Sandwiches are often messy and difficult to eat.	y n
• Our company does not use sandwiches as meals or doorstops.	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)
 Source: IDC, 2004

There are 3–12 bullets in each table. To use the self-assessment tool, simply circle yes (y) if your partner program exhibits that characteristic. (There is no need to circle no [n] for other characteristics.) Please select as many of the characteristics that apply, but only if the entire description is applicable to your program. In the example, if your sandwiches all have peanut butter, but not all have jelly, please do not select that first characteristic.

If you feel that the questions do not accurately reflect your program — describe in prose that element and the characteristics that you think more accurately reflect its value to your partner program. We are continually looking to improve the self-assessment tool and will use your feedback to enhance the next version of this guide.

We would encourage you to complete the assessment completely before adding descriptive text. It is possible that the characteristics you wish to add are included in another element or section.

SITUATION OVERVIEW

Self Assessment Tool

Core Program

The core partner program represents the umbrella under which all other modules in the partner relationship fall. It defines the relationship with the partner, and its structure will change less frequently (every 7–10 years) than any other facet of the program model (see Tables 2–12).

The core program contains the following elements:

- Management "metrics"
- Alignment strategy
- Partner screening and recruitment
- Business planning and metrics
- Reward structure
- Benchmarked processes/methodologies
- Partnership program governance
- Best practice policies
- Business unit relationships
- Linkage to value chain
- Benefit alignment with partner needs

TABLE 2**CP1: Management Metrics**

Q. *What metrics are used to measure the impact of the partner program?*

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> • A broad range of financial and nonfinancial metrics are used to measure both the tactical and strategic impact of our partnership program. Metrics derived from common data sources and that align with metrics used for other business units. Additional data and benchmarks from outside our company are also regularly used. 	y n
<ul style="list-style-type: none"> • A variety of metrics are used to measure either the tactical or strategic impact of our partnership program. Most reliable and valuable data is contained in financial results derived from enterprise-level financial reporting systems. Data from outside sources is also used periodically. 	y n
<ul style="list-style-type: none"> • Key metrics are used to measure the impact of our partnership program. Leads, close rates, and other partner-specific data are most helpful in evaluating partnership performance. 	y n
<ul style="list-style-type: none"> • Metrics are created and adapted regularly to ensure the most meaningful representation of partner performance. 	y n
<ul style="list-style-type: none"> • When needed, key metrics are created and compared with historic data to demonstrate partner performance. 	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

See *Building an Alliance Measurement Dashboard: A Profile of Cisco Systems* (IDC #29246, April 2003).

Source: IDC, 2004

TABLE 3**CP2: Alignment Strategy**

Q. *How is the partner program kept in alignment with corporate strategic initiatives?*

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> • Senior product, sales, marketing, and technical leadership review role and contribution of partner program in organizational strategic initiatives regularly (usually annually). 	y n
<ul style="list-style-type: none"> • Product, sales, marketing, and technical leadership align partnership program with established organizational initiatives. 	y n
<ul style="list-style-type: none"> • The partner and vendor sales strategies are aligned through established rules of engagement and sales strategies. 	y n
<ul style="list-style-type: none"> • Marketing and product leadership review partnership contribution to organizational goals and make refinements to strategy as necessary. 	y n
<ul style="list-style-type: none"> • Partner leadership refines portfolio strategy as necessary and informs sales, marketing, technical, and organizational leadership. 	y n
<ul style="list-style-type: none"> • Partnership portfolio is reviewed when necessary as organizational needs change. 	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

TABLE 4

CP3: Partner Screening and Recruitment
Q. How are partners recruited or selected for participation in the partner program?

	Evaluation (circle all that apply)
• Potential partners must have senior sales, marketing, or technical sponsorship for consideration.	y n
• Partners of all types are actively recruited, screened, and selected based on articulated value proposition.	y n
• Potential partners must align with organizational marketing and future technical strategy for selection.	y n
• Companies must agree to specific conditions for acceptance into partner program.	y n
• Partner program is all encompassing and supports vendors of all types, markets, and opportunities.	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

TABLE 5

CP4: Business Planning and Metrics
Q. How is business planning performed?

	Evaluation (circle all that apply)
• Business planning and metrics extend to regional levels with full participation of regional alliance management.	y n
• Regular and systematic review of performance to business plan on at least a quarterly basis. Team proactively identifies remedial actions. Executive management accountability for performance is in place and actively supported by senior management.	y n
• Yearly business planning with collaboratively developed business commitments and activities. Success metrics established.	y n
• Defined process and templates for annual business planning.	y n
• Ad hoc business planning and follow-up of performance.	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

TABLE 6**CP5: Reward Structure**

Q. *How are partner rewards/compensation determined?*

	Evaluation (circle all that apply)
• Partner programs use a combination of financial and nonfinancial measurements to determine reward and compensation. Customer satisfaction plays a key role in partner rewards. Influence activities are consistently measured and rewarded.	y n
• Financial measures are the primary metric for determining partner compensation. Customer satisfaction plays a small role, and influence activities are becoming more accurately captured.	y n
• Financial measures are the only metric used for determining partner compensation, and there are few disputes or discrepancies with partner payouts. Influence activities have been inconsistently captured or applied.	y n
• Financial measures are the only metric used for determining partner compensation, and there are normal disputes between partners and our company regarding payouts.	y n
• Financial measures are the only metric used for determining partner compensation, and dispute resolution is required to ensure continued relationships with our partners.	y n
• Influence payments are internally accounted for as discounts or "contra revenue."	y n
• Influence payments funds are internally accounted for as an expense item.	y n
• The influence payment allocation and management process has been updated in the past 18 months.	y n
• Influence payments represent less than 5% of global partnership spending.	y n
• Influence payments represent between 5% and 10% of global partnership spending.	y n
• Influence payments represent between 10% and 15% of global partnership spending.	y n
• Influence payments represent more than 15% of global partnership spending.	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

See *Microsoft's Partner Program: The Next Generation Goes Boldly Beyond* (IDC #30353, October 2003).

Source: IDC, 2004

TABLE 7**CP6: Benchmarked Processes/Methodologies**

Q. *How are benchmarks used to evaluate and improve the organizational effectiveness of the partner program?*

	Evaluation (circle all that apply)
• Partnership organization participates in operational benchmarking both inside and outside the vendor organization.	y n
• The partnership organization supports the exchange of partner management best practices by engaging partners for feedback.	y n
• Suggestions are integrated into partner management to support an increased satisfaction of participating partners.	y n
• Benchmarking will add little benefit to the partnership organization because of unique characteristics and constraints of the vendor and/or partner organization.	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

TABLE 8**CP7: Partnership Program Governance***Q. How is the partner program governed?*

	Evaluation (circle all that apply)
• Partnership program leadership reports directly to executive leadership of organization and coordinates all aspects of partner programs.	y n
• Partner leadership reports to marketing and product leadership to ensure alignment with corporate marketing or product development goals.	y n
• Partner leadership is distributed through the organization to ensure equitable distribution of assets and maximum opportunity for all partners.	y n
• Partner leadership is inconsistently constituted with frequent changes of responsibility and reporting relationships.	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

TABLE 9**CP8: Best Practice Policies***Q. How are organizational best practices identified and institutionalized in the partner organization?*

	Evaluation (circle all that apply)
• Partner organization uses processes to ensure industry and corporate best practices in partner management are identified and applied. Significant effort is expended in reviewing and improving operational performance.	y n
• Partner organization regularly reviews processes and institutes changes that are known to support improved operations.	y n
• Best practices are applied to partner program as they are identified. Modification to best practices ensures maximum alignment with and minimum disruption to existing organizational structure.	y n
• Partner organization makes changes to existing practices to reflect changing organizational needs and opportunities.	y n
• Partnership leadership identifies and implements changes independently to processes to ensure maximum effectiveness.	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

TABLE 10

CP9: Business Unit Relationships

Q. How effective is the relationship between the partnership organization and other organization business units, especially stakeholder relationships?

	Evaluation (circle all that apply)
• Portfolio management is conducted in consultation with related business units and product management areas.	y n
• Business units and product management have representation in the portfolio management process.	y n
• Portfolio management is distributed to product or business unit management to ensure maximum alignment with initiatives.	y n
• Portfolio management is conducted annually to ensure consistency of message and minimize disruption on organizational operations.	y n
• Portfolio management occurs continuously to ensure optimum flexibility.	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

TABLE 11

CP10: Linkage to Value chain

Q. How effective is the alignment of partnerships to the customer value chain?

	Evaluation (circle all that apply)
• Partner portfolio is specifically tasked with ensuring maximum alignment with entire customer value chain (hardware, software, services, etc.).	y n
• Partner portfolio has substantial alignment with both customer and company value chain.	y n
• Partner portfolio grants preference to partners that support or do business with company. Strategic relationships require partners to be customers/suppliers of each other.	y n
• Partner portfolio is aligned with corporate value chain as much as possible.	y n
• It is impossible to determine portfolio alignment with corporate value chain.	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

TABLE 12

CP11: Benefit Alignment with Partner Needs

Q. How do partners ensure maximum alignment between their needs and partnership program benefit offerings?

	Evaluation (circle all that apply)
• Partners can effectively select their involvement in all partner program benefits based on their need.	y n
• Partners can effectively select their support service level based on their need.	y n
• Partners can effectively select their technology infrastructure participation based on their need.	y n
• Partners can effectively select their marketing/communication participation based on their need.	y n
• Partners can effectively select their market coverage participation based on their need.	y n
• Partners can effectively select their training and certification participation based on their need.	y n
• Partners can effectively select their product technology integration based on their need.	y n
• Partners can effectively select their participation in tactical marketing initiatives based on their need.	y n
• Partners can effectively select their use of vendor professional services based on their need.	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

Typology

The typology layer of the partner program structure exists to define entitlements based on achievements and can act as a high-level segmentation of partners within the core program (see Tables 13 and 14).

Typology contains the following elements:

Ecosystem clarity

Integration with administration

TABLE 13

T1: Ecosystem Clarity

Q. How does the partnership program establish "types" or categories of partners to ensure maximum customer value when presenting partner ecosystems as a sales benefit?

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> • The partner ecosystem clearly defines how the company works with (engages) partners of all types. The ecosystem segments reflect the various partner types and various business problems appropriate to the business. • The ecosystem is clearly a marketing advantage. Easily explained and leveraged during marketing and sales meetings to support competitive positioning. • The ecosystem is evolving to include a more complete set of partner relationships. • The ecosystem reflects the vendors central position in the markets it serves. Each partner in the ecosystem is dependent on the vendor to establish market presence and ultimate success. • The partner relationships are established on a one-off basis to meet specific needs and opportunities. 	<p>y n</p> <p>y n</p> <p>y n</p> <p>y n</p> <p>y n</p>

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

TABLE 14

T2: Integration with Administration

Q. How does the partner ecosystem reflect itself in partner program administration?

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> • The ecosystem alignment is constantly reflected in the partner program administration and the core program. • The ecosystem alignment is partially reflected in the partner program administration and the core program. Some ecosystem areas (either business problems or relationships) are not completely integrated with program administration. • The ecosystem alignment is inconsistently reflected in the partner program administration and the core program. Ecosystem areas are not integrated with program administration. Ecosystem is effectively used as a presentation tool to either recruit partners or establish a value proposition for a customer. 	<p>y n</p> <p>y n</p> <p>y n</p>

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

Support

The support module represents the vendor's extension of its sales and technical resources to partners that require assistance in tactical support situations. Access is determined by a partner's position in the core program, which is based on the partner's level of commitment and success (see Tables 15–17).

Support contains the following elements:

- Support access
- Support escalation
- Support quality

TABLE 15

SP1: Support Access

Q. How do partners access support to facilitate sales, design, deployment, and maintenance of systems?

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> • Multiple methods of requesting support (Web based, email, and telephone) available 24 x 7 with specific service level agreement for all partners. The processes for partners to access program support is clearly understood and consistently used. Metrics are used to identify communication weaknesses and procedural challenges and offer early warning of potential rifts with the partner program. 	y n
<ul style="list-style-type: none"> • Multiple methods of requesting support (Web based, email, and telephone) available 24 x 7 with specific service level agreement for all partners. The processes for partners to access program support is understood and consistently used. Some metrics are used to identify communication weaknesses and procedural challenges. 	y n
<ul style="list-style-type: none"> • Support offered in multiple methods, including through interactive and intelligent Web site, email, and phone support with predictable response times and incident tracking. 	y n
<ul style="list-style-type: none"> • Support made available through self-service offering, usually through Web site. 	y n
<ul style="list-style-type: none"> • Email response or only one channel of support access available. 	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

TABLE 16

SP2: Support Escalation

Q. How are support calls escalated to ensure timely, accurate resolution?

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> • Support calls are consistently escalated and resolutions tracked. Metrics are used to assure timely response rates and to manage call volumes. 	y n
<ul style="list-style-type: none"> • Support calls are manually tracked and escalated. 	y n
<ul style="list-style-type: none"> • No clear escalation procedures exist. 	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

TABLE 17

SP3: Support Quality

Q. How is technical support quality managed and monitored?

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> • Technical support for partners extends beyond company products to include problem isolation and resolution. 	y n
<ul style="list-style-type: none"> • Support quality is measured and reflects excellent and improving quality. Partner insight into trouble tracking and escalation. 	y n
<ul style="list-style-type: none"> • Support quality is measured and reflects improving quality. Partner insight into trouble tracking and escalation is sought and acted upon. 	y n
<ul style="list-style-type: none"> • Support quality reflects good quality. Partner insight into trouble tracking and escalation is sought but feedback is sporadic. 	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

Infrastructure

The infrastructure module is defined by a vendor's ability to automate all partner program processes and integrate them internally across departments and externally to partners via a Web portal (see Table 18–21).

Infrastructure contains the following elements:

- Common data structure
- Partner portal
- Lead tracking
- Partner directory

TABLE 18

IS1: Common Data Structure
 Q. How is partnership data managed, used, and maintained?

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> • All organizational relationships are reflected in a single unified data structure. Consistent and reliable data is available across partner activities for a single partner, client, geography, and product. 	y n
<ul style="list-style-type: none"> • Organizational relationships are substantially reflected in a common reporting structure. Reliable data is available across key measurement variables (partner, client, geography, and product) and standard reports reflect the most common queries. 	y n
<ul style="list-style-type: none"> • Data and reporting for partner activities is a combination of enterprise and business unit reporting tools. Most activities are consistently reported. Relatively little data must be manually manipulated to answer common queries. 	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

TABLE 19**IS2: Partner Portal**

Q. *How integrated is the partner Web site to the business practices of both partner and program management activities?*

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> • Highly personalized "my partner portal." Provides information specific to the alliance and program participation level and status. Provides collaborative work environment for joint activities, development, marketing, and sales. 	y n
<ul style="list-style-type: none"> • Facilitates partner-to-partner connections to support community of practice or other activities that help partners develop additional business. 	y n
<ul style="list-style-type: none"> • One point of entry, one log-in to access all partner resources including developer, technical, training, marketing, sales, and other partner resources. System is integrated with PRM functions such as lead distribution and campaign management. 	y n
<ul style="list-style-type: none"> • First source of information for partners. Complete information on partner program benefits, requirements, and performance. Complete information on products, services, tools, and support. Primary delivery means for many of the program benefits, including training, service, marketing tools, and sales engagement. 	y n
<ul style="list-style-type: none"> • Key information provided about recent program changes and partner notices. Core tools and information provided. 	y n
<ul style="list-style-type: none"> • Informational site. Password protected. 	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

TABLE 20**IS3: Lead Tracking**

Q. *How effectively are leads visible to the vendor and appropriately credited to partners?*

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> • Leads, sales progress, close rates, and revenue can be tracked collaboratively by partners and company. Role of partner in making the sale is clear and measurable. 	y n
<ul style="list-style-type: none"> • Leads, sales progress, close rates, and revenue can be reported and serve as reliable indicator of partner close rate. No additional systems are in place to track joint customers. Disputes about partner role and lead ownership are consistently addressed. Resolution reflects both customer needs and partner demands. 	y n
<ul style="list-style-type: none"> • Clear metrics on source of leads and revenue impact. 	y n
<ul style="list-style-type: none"> • Incoming leads are counted and qualified. Falls short of tracking source of leads to revenue generated. 	y n
<ul style="list-style-type: none"> • Incoming leads are inserted into the lead pipeline. 	y n
<ul style="list-style-type: none"> • Ad hoc tracking. 	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

TABLE 21

IS4: Partner Directory

Q. How useful is the partner directory to the vendor, partners, and customers?

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> • Partner directory becomes a marketplace for partners. Directory is actively marketed as an asset, and customers are driven to it. Metrics are available to partners on hits, visitors to their pages, and requests for more information. Leads are automatically generated and tracked. For global companies, directory is accessible in multiple languages. 	y n
<ul style="list-style-type: none"> • Partner directory is valued marketing platform where partners can showcase joint customer success. Customers can easily search by industry, technology, or problem to quickly identify solutions. 	y n
<ul style="list-style-type: none"> • Advanced search functions. Provide regional offices contacts. Complete solution descriptions with downloadable collateral. Cross-links to partner-specific Web pages. 	y n
<ul style="list-style-type: none"> • Partner descriptions clearly describe the joint value proposition. Simple search available on partner directory. Contact information available for both company and applicable partners. 	y n
<ul style="list-style-type: none"> • Logo or listing on Web site. Links to partner home pages. 	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

Marketing/Communications

Marketing/communications (marcom) is defined by all activities that are tied to the marketing resources and initiatives related to driving partner business and all facets of communications with partners around all aspects of the partner relationship (see Tables 22–24).

Marketing/communications contains the following elements:

- Relationship management
- Program support
- Partner conference

TABLE 22

MC1: Relationship Management

Q. How are individual relationships with partners managed for both strategic and programmatic partners?

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> • For strategic relationships, there is a single relationship manager (1:1). • For programmatic relationships, there is a standard ratio between managers and relationships (e.g., 1:10, 1:20) and specific assignment of relationships to managers. • Relationship managers are responsible collectively or in groups for specific relationships. • Partner relationships are officially managed at the product marketing level. • All relationships are managed collectively at both the product and company level. 	<ul style="list-style-type: none"> y n y n y n y n y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

TABLE 23

MC2: Program Support

Q. How do partners access information and obtain support for their relationship with the vendor?

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> • Program support for partners extends beyond company eligibility and incident response to include compensation, channel conflict, and other issues. Partners can use program support to identify critical sales contacts, marketing leads, or product development contacts as necessary. Clear response times are articulated for both strategic and programmatic partners to ensure rapid and cost-effective partner support. • Multiple methods of requesting support (Web based, email, and telephone) available 24 x 7 with specific service level agreement for all partners. • Support offered in multiple methods but most contact comes via the Web site or email communication. There are predictable response times and incident tracking. • Support made available through self-service offering, usually through Web site. Clear escalation of unresolved issues by email and phone. • Email response or only one channel of support delivery. No clear escalation procedures. 	<ul style="list-style-type: none"> y n y n y n y n y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

TABLE 24

MC3: Partner Conference

Q. *What is the partner conference's purpose, and how significant an event is it to the partners and the industry?*

	Evaluation (circle all that apply)
<ul style="list-style-type: none">• Considered a must-attend industry event. Partners have access to key executives. Key executives clearly value partner feedback and relationship building.	y n
<ul style="list-style-type: none">• Special interest groups are regularly attended and active between conferences. Invitation-only advisory groups on technical or business issues and trends.	y n
<ul style="list-style-type: none">• Partner conference effectively communicates company partner philosophy, changes in partner program, and relevant information on products and services. Clearly advances the relationship with partners.	y n
<ul style="list-style-type: none">• Regular partner conference. Does not completely meet partner expectations or requirements for information. Provides company executives opportunity to describe recent successes and future direction of company.	y n
<ul style="list-style-type: none">• No or infrequent conferences.	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

Coverage Model

Coverage is the module that defines where a vendor expects partners to focus their business efforts and is typically categorized in four areas: geography, industry (vertical or general business), market (enterprise versus SMB), and solution (see Tables 25–27).

Coverage model contains the following elements:

- Ecosystem support
- Appropriateness to business
- Alignment with vendor strategy

TABLE 25

CM1: Ecosystem Support

Q. How does the coverage model support the vendor's solution ecosystem?

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> • The coverage model and the various roles in which partners can participate clearly support growth of the partner ecosystem and individual partner profitability. 	y n
<ul style="list-style-type: none"> • The coverage model supports vendor growth through strategic identification of key opportunities for active participants based on specific partner capabilities. 	y n
<ul style="list-style-type: none"> • The coverage model manages the degree of conflict between the vendor and the active participants of the partner ecosystem. 	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

TABLE 26

CM2: Appropriateness to Business

Q. How appropriate is the coverage model to the vendor's business model, market position, and offering?

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> • The coverage model reflects the vendor's role in the broader technology marketplace and includes a "life-cycle" approach to establishing appropriate relationships. 	y n
<ul style="list-style-type: none"> • The coverage model is unique to the vendor — reflecting its unique business and approach to market. 	y n
<ul style="list-style-type: none"> • The coverage model is developed using commonly applied characteristics. 	y n
<ul style="list-style-type: none"> • The coverage model has remained stable to permit an established route to market of a growing or changing product line. 	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

TABLE 27

CM3: Alignment with Vendor Strategy

Q. How well aligned is the coverage model with the vendor's corporate growth objectives?

	Evaluation (circle all that apply)
• Partnership executives assist in the formation of corporate strategy to ensure the tight integration between corporate objectives and the partnership coverage model.	y n
• After creation of the corporate strategy, the coverage model is aligned to support the vendor's corporate growth objectives.	y n
• The coverage model is constructed to reflect the changing needs of the partnership program and supports the corporate growth objectives as best as it can.	y n
• The coverage remains stable in spite of changing corporate growth strategies.	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

Training and Certification

The training and certification module of the overall partner program structure allows vendors to define, track, and provide competency training and levels of attainment that are required of a partner's technical, solutions, or market focus. It is also used to promote partner value to end customers (see Tables 28–32).

Training and certification contains the following elements:

- Market need
- Training quality
- Resources funding
- Training accessibility
- Professional certification

TABLE 28

TC1: Market Need

Q. How well is the market need for partner training understood and incorporated into the training offering?

	Evaluation (circle all that apply)
• Skill gap research identified significant alignment between training offerings and partner needs.	y n
• Some skill gap research suggested alignment between training offerings and partner needs.	y n
• Customer, partner, and sales force feedback strongly indicated market demand for quality training.	y n
• Training has evolved to support product utilization and customer/partner skills.	y n
• Training is not a significant element of vendor partner program.	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)
 See *The Relationship Between Certifications and Partnership Programs: Alignment Is Key* (IDC #28374, December 2002).
 Source: IDC, 2004

TABLE 29

TC2: Training Quality

Q. How is training quality assured?

	Evaluation (circle all that apply)
• Job/task research identifies work conditions including the equipment, information, and physical environment for each training element. Key performance elements of training, including work steps and performance metrics, ensure training is focused on critical needs and valid work processes.	y n
• Training is of exceptional quality and includes both self-paced and instructor-led training. Training is shown through post-testing and performance testing to positively influence skills and capabilities of students.	y n
• Training extends beyond company product to include professional development in emerging technologies and product linkages to other key technologies. Establishes industry standard for professional competency in appropriate areas.	y n
• Training content and objectives are identical in all available training modalities. Pretest/post-test analysis show appropriate skill gains in key areas.	y n
• Training is built using the best available methods to maximize value while minimizing development costs.	y n
• Training developers use work experience to identify work conditions and training objectives. Key performance elements of training are established for selected sections of the training curriculum.	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)
 See *The Relationship Between Certifications and Partnership Programs: Alignment Is Key* (IDC #28374, December 2002).
 Source: IDC, 2004

TABLE 30

TC3: Resources Funding
Q. To what degree does the vendor support partner training?

	Evaluation (circle all that apply)
• Company subsidizes or reimburses partner training costs upon certification.	y n
• Company subsidizes or reimburses partner training costs as a benefit for all partner types.	y n
• Company subsidizes or reimburses partner training costs for particular types or categories of partner or for specific, targeted product lines.	y n
• Partners are offered discounted rates for training consistent with bulk purchase or prepaid plans available to end customers.	y n
• Priority in scheduling is provided to partners.	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)
 Source: IDC, 2004

TABLE 31

TC4: Training Accessibility
Q. How accessible are training offerings?

	Evaluation (circle all that apply)
• Training is preferred by professionals of related technologies. Includes hands-on labs and experiential learning. Training graduates supported with technical communications and other information to support informal development. Topical reference tools (paper based or online) are available to graduates to reinforce instruction.	y n
• Training offered in multiple modalities including Web-based and classroom-based instructor-led training and self-paced offerings online or in print.	y n
• Training made available through one modality (instructor led or self-paced). Training is sufficient to enable competency in the product or service.	y n
• Limited capability to provide training. Training content (or product documentation) is made available to third parties for training delivery or content development and delivery.	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)
 See *The Relationship Between Certifications and Partnership Programs: Alignment Is Key* (IDC #28374, December 2002).
 Source: IDC, 2004

TABLE 32**TC5: Professional Certification**

Q. *How reliable and valuable is professional certification?*

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> • Stringent validation of subject matter expertise, competency, skills mastery, and validated industry experience. Includes tracks or specializations focused on job roles. The certification program can be shown to positively affect the stakeholders and the organization. 	y n
<ul style="list-style-type: none"> • Certification translates to a premium services billing rate and a high demand for services. 	y n
<ul style="list-style-type: none"> • Certification testing included not only subject matter knowledge but also tested for competency and skills mastery. 	y n
<ul style="list-style-type: none"> • Professionals took and passed a third-party-administered exam that verified subject matter knowledge. Certification translates to a demand for services and a higher professional rate. 	y n
<ul style="list-style-type: none"> • Professionals attended and completed a class and completed in-class assignments and tests designed to demonstrate skill with the subject matter. 	y n
<ul style="list-style-type: none"> • No certification. 	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

Technology Integration

This module encompasses approaches to product and technology integration between the vendor and the partner. It also relates to the leadership role the vendor and its ecosystem partners play in the wider technology marketplace. This module resides on the cusp between partner programs and research and development. The relationships established in the R&D labs frequently evolve into strategic technical partnerships. At the same time, long-term technical partnerships often evolve into trusted R&D relationships (see Tables 33–35).

Technology integration contains the following elements:

- Road map disclosure/early access to software
- Technical advisory council
- Product certification

TABLE 33**TI1: Road Map Disclosure/Early Access to Software**

Q. How effectively are partners integrated into product development plans?

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> • Collaborative and synchronized product planning and code review to drive simultaneous product availability for partners. • Formal beta, selected alpha, and prerelease programs available to all key partners. Actively solicit partner input to product performance. Formal process for sharing product road maps. • Formal beta programs by invitation to key partners to test, integrate, and endorse at product announcement and to synchronize with product release cycles. • Limited early access but with enough lead time to synchronize partner product release cycles or go to market timing. • No early access or advance information available to partners to ensure clear marketing message. 	y n y n y n y n y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

TABLE 34**TI2: Technology Advisory Council**

Q. How effectively are partners used to establish market standards and adoption of key technologies?

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> • Technology advisory council demonstrates industry leadership or drive, or it influences standards and technology direction through technical relationships. • Standing technical advisory committee appointed and committed for a set duration (typically one year). Regular feedback on action items and how inputs were acted upon. Develops a strong community with a common technical vision. • Regular forum for senior technical staff to review industry technical trends, standards development, and product road map. Supplemented with forums for developers. • Convenes as a regular forum at developer conferences or regular advisory meetings. • Ad hoc forums, such as online chat or occasional technical advisory meetings. 	y n y n y n y n y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

TABLE 35**TI3: Product Certification**

Q. *How formal is the product certification process?*

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> • Stringent testing both in lab environment and in an operational environment required for product certification. Well-supported process is efficient for vendor, partner, and third party. Noncertification is a competitive disadvantage. 	y n
<ul style="list-style-type: none"> • Testing by vendor or third party. Well-documented testing guidelines and specifications. Certification carries considerable market value and customer confidence. 	y n
<ul style="list-style-type: none"> • Self-certification. Testing guidelines, specifications are documented. 	y n
<ul style="list-style-type: none"> • Self-certification. No stringent testing or compatibility guidelines. 	y n
<ul style="list-style-type: none"> • Product certification is not required for product line or market. 	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

Tactical Initiatives

This module encompasses all tactical approaches to the partner relationship, including recruitment, product/sales promotions, and field initiatives (see Tables 36–42).

Tactical initiatives contains the following elements:

- Joint marketing initiatives
- Engagement with strategic relationships
- Opportunistic sales engagement
- Marketing funds
- Lead sharing
- Marketing tools/templates
- Reward structure

TABLE 36**TAC1: Joint Marketing Initiatives**

Q. How effectively are partners integrated into tactical marketing initiatives?

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> • All functional organizations/business units are aligned to initiatives. Partner program is highly invested in joint marketing initiatives. Creates sustainable competitive differentiation and market dominance for all partners. • Key internal stakeholders compensated and measured on strategic initiative metrics. • Strategic imperatives are aligned in participating alliance companies. Complete marketing mix, go-to-market campaign. Creates a measurable impact in competitive advantage and market share gain for participating partners. • Opportunistic planning of joint marketing initiatives based on pockets of regional alignment. • Joint marketing campaign directed toward specific target markets, geographies, product lines, and so forth. Marketing initiatives focus on narrowly defined benefits and are usually product or product-line specific. 	y n y n y n y n y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

TABLE 37**TAC2: Engagement with Strategic Relationships**

Q. How effectively are strategic partners integrated into tactical marketing initiatives?

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> • Sales teams proactively and collaboratively select targets of opportunity with strategic partners. Sales strategies and call plans are well-orchestrated. High win rate and accelerated sales cycle are common. • Sales force has a process of joint engagement that supports the collaborative sales cycle. Sales people have been mapped to each other across both organizations. Regional, industry, and solution teams collaborate to develop additional targets and initiatives. • Sales force is aware and aligned to the tactical initiative. Company sales organization understands the joint value proposition for key partners. Sales team proactively engages with the partner after an opportunity is qualified. • Sales force is consistently informed and has access to tools to qualify a potential opportunity under the initiative. Joint qualification is sporadic. • Sales force is inconsistently aware of the initiative and will engage only when approached by partner team with an immediate opportunity. 	y n y n y n y n y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

TABLE 38

TAC3: Opportunistic Sales Engagement

Q. How effectively does the partner organization facilitate engagement between sales and appropriate partners when an opportunity is identified?

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> • Joint sales calls are conducted. Best practices shared and top performers are recognized for contribution to partnering effort. 	y n
<ul style="list-style-type: none"> • Formal opportunity planning occurs on a regular basis. Structure for driving business results through joint sales initiatives is in place. Opportunistic sales engagement results in high close rates across strategic partners and solutions. 	y n
<ul style="list-style-type: none"> • Sales force understands the market opportunity and areas of focus for identifying joint sales initiatives. Opportunistic sales engagement results in competitive offerings that advance the market position of both companies. 	y n
<ul style="list-style-type: none"> • Sales force is aware of partner solutions and understands the rules of engagement for working with partners on sales initiatives. Opportunistic sales engagement is about as successful as approaching prospects separately. 	y n
<ul style="list-style-type: none"> • Sales force has inconsistent understanding of partner solutions and capabilities. In some cases, partners complain that sales compete with partners for customers. 	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

TABLE 39**TAC4: Marketing Funds**

Q. *How well used are marketing funds made available to partners?*

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> • Process for corporate and field marketing organizations to actively engage with partners and leverage use of funds, driving incremental revenue and brand extension to the company. 	y n
<ul style="list-style-type: none"> • Projected ROIs for use of funds are validated and tracked. Leads and incremental revenue can be attributed to specific campaign and initiatives. Funds are clearly used in support of strategic market initiatives. 	y n
<ul style="list-style-type: none"> • Funds are budgeted based on yearly business plans and allocated on quarterly performance. Funds are matched by partner or partners. 	y n
<ul style="list-style-type: none"> • Clear process for fund application, disbursement, or reimbursement. Funds are generally used in alignment with company target markets. 	y n
<ul style="list-style-type: none"> • Funds allocation occasionally backed with business plans. ROI analysis is difficult or unreliable. 	y n
<ul style="list-style-type: none"> • Market development funds are internally accounted for as discounts or "contra revenue." 	y n
<ul style="list-style-type: none"> • Market development funds are internally accounted for as an expense item. 	y n
<ul style="list-style-type: none"> • The market development fund allocation and management process has been updated in the past 18 months. 	y n
<ul style="list-style-type: none"> • Market development funds represent less than 5% of global partnership spending. 	y n
<ul style="list-style-type: none"> • Market development funds represent between 5% and 10% of global partnership spending. 	y n
<ul style="list-style-type: none"> • Market development funds represent between 10% and 15% of global partnership spending. 	y n
<ul style="list-style-type: none"> • Market development funds represent more than 15% of global partnership spending. 	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

TABLE 40**TAC5: Lead Sharing**

Q. *How effectively are leads shared with appropriate partners?*

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> • Partners are satisfied with lead sharing quality and process. It is a consistent part of their pipeline and represents a quantifiable opportunity for most partners. Partners are distributed leads based on known skills/competency. Leads are reassigned based on published criteria. 	y n
<ul style="list-style-type: none"> • Leads are provided on a consistent basis. Closed-loop system in place in terms of lead distribution and quality. 	y n
<ul style="list-style-type: none"> • Lead sharing process actively used. Incoming leads are qualified, integrated in sales force automation systems, and distributed to sales teams. Leads are distributed to a small set of partners based on prior customer experience. 	y n
<ul style="list-style-type: none"> • Lead sharing process is in place. Leads are transferred regularly though follow-up, and qualification is performed irregularly. 	y n
<ul style="list-style-type: none"> • Lead sharing is done informally with little tracking or measuring of lead value. 	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

TABLE 41**TAC6: Marketing Tools/Templates**

Q. How effective are the marketing tools and templates at supporting the organizational coverage model and go-to-market strategies of its partners?

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> • Marketing tool sets differentiated by industry and target market segment. Supports partner solution portfolios and positions key partners as integral to the whole solution. 	y n
<ul style="list-style-type: none"> • Subscription-based marketing campaigns. Built-in lead tracking, distribution, and qualification. 	y n
<ul style="list-style-type: none"> • Complete go-to-market tool set to build awareness around joint offers, drive preference, generate leads, and provide sales tools. Clear and timely process for review and approval of partner-generated materials. 	y n
<ul style="list-style-type: none"> • Product collateral on demand. Marketing templates and boilerplate to support basic marketing activities in PR, events, and collateral. 	y n
<ul style="list-style-type: none"> • Simple templates and tools available for customization. 	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

TABLE 42**TAC7: Reward Structure**

Q. How effective are partner rewards at motivating partner participation in tactical initiatives and ensuring loyalty and expanded opportunities?

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> • Financial reward and compensation are consistently and effectively used to motivate partner participation within tactical initiatives. 	y n
<ul style="list-style-type: none"> • Financial reward and compensation are occasionally used to motivate partner participation within tactical initiatives. Impact and participation rates are monitored for effectiveness. 	y n
<ul style="list-style-type: none"> • Financial reward and compensation are not used to motivate partner participation in tactical initiatives. 	y n
<ul style="list-style-type: none"> • Financial reward and compensation sometimes work against partner participation in tactical initiatives. 	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

Vendor Professional Services

Services, like "initiatives," live outside the partner model and represent the activities of the vendor's services organization in developing opportunities and revenue through partners in some kind of programmatic way (see Tables 43–45).

Vendor professional services contains the following elements:

- Benefits to partner
- Engagement and work process
- Services integration with coverage model

TABLE 43

VPS1: Benefits to Partner

Q. How effectively are vendor services developed for use by partners?

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> • Professional services partners participate in the development and distribution of appropriate intellectual property to ensure viable and profitable procedures. 	y n
<ul style="list-style-type: none"> • Frameworks, model architectures, implementation work plans, and related intellectual property are developed as soon as possible to ensure partner readiness and support rapid skill transfer between vendor and partner community. IP consistently considers industry variation and alternatives to underlying infrastructure to ensure the widest possible applicability. Vendor organization actively seeks feedback from professional services partners to ensure development and distribution of appropriate intellectual property. 	y n
<ul style="list-style-type: none"> • Frameworks, model architectures, implementation work plans, and related intellectual property are available or being developed for major product areas. Variations for target vertical industries or business segments represent corporate focus and market demand. 	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

TABLE 44**VPS2: Engagement and Work Process**

Q. *How well do partner and vendor services organizations work with each other on joint engagements?*

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> Partners and customers consistently report high satisfaction with projects including both vendor and partner services teams. 	y n
<ul style="list-style-type: none"> Degree of involvement and scope of responsibility is consistent and clearly established between vendor and partner services teams for all joint projects. 	y n
<ul style="list-style-type: none"> Degree of involvement and scope of responsibility is established between vendor and partner services teams for joint projects on a case-by-case basis and depending on the nature of the project and needs of the client. 	y n
<ul style="list-style-type: none"> Involvement and scope of responsibility between vendor and partner services teams is developed by the sales organization before or during contract negotiations. Vendor professional services roles and responsibility typically grow during a project to account for changing scope or complexity of the project. 	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

TABLE 45**VPS3: Services Integration with Coverage Model**

Q. *How well aligned are the vendor's services offerings and strengths with the vendor's coverage model?*

	Evaluation (circle all that apply)
<ul style="list-style-type: none"> Professional services are tightly integrated into the corporate coverage model and reflect a thorough understanding of customer needs and partner services offerings. Channel conflict is clearly understood to exist at defined account types. The sales organization provides regular feedback on issues related to the rules of engagement and changes to ensure alignment with partner and market evolution. 	y n
<ul style="list-style-type: none"> Professional services are included in the corporate coverage model and focus on customer needs to drive offering. Channel conflict is avoided through market segmentation. The sales organization works with the partner organization to support changes to the rules of engagement that support corporate strategy. 	y n
<ul style="list-style-type: none"> All services are included in the corporate coverage model. No differences between products and services need to be called out to ensure consistent application and minimize channel conflict. 	y n
<ul style="list-style-type: none"> Professional services are not included in the coverage model. Professional services and partners engage in healthy competition that supports mutual growth and is responsive to market demands. 	y n

Note: If you feel that these statements do not accurately reflect your program, describe below those characteristics you think more accurately reflect the value of this element to your partner program. (The characteristics you wish to add may be options included in another section of the tool, so please complete the entire assessment before adding explanatory text.)

Source: IDC, 2004

FUTURE OUTLOOK

Self-evaluation will enable individual companies to systematically collect a deeper knowledge of their own practices. It also provides a structure for comparing those practices against the wider industry.

IDC believes that through continued improvement, highly functioning ecosystems or coalitions of both loosely and closely coupled companies can be developed that will result in significant organizational value. By standardizing the management practices, companies will consistently manage their relationships as well as participate in predictable, productive, and profitable ecosystems.

As deeper, practical knowledge is accumulated about the method and practice of partner program management, companies will be more inclined to support deeper and broader partnerships and enable more beneficial coalitions. Until that understanding becomes commonplace, most programs will remain only marginally productive.

ESSENTIAL GUIDANCE

IDC believes software vendors must be prepared to invest in a new partner program model to more effectively leverage the value of their partner ecosystem. It is important for software vendors reviewing partner program strategies to use the program model outlined in this document to gain a clearer view on how to structure programs. Vendors should consider the following when designing or modifying program strategy and structure:

- ☒ A relevant partner program must recognize and reward partners for their complete contribution to the customer relationship, including solutions and/or market expertise and influence and/or resale activity.
- ☒ Program development must include a single core program that maintains equilibrium across a universe of disparate partner types. It ensures that all partners are cultivated under one program yet are not viewed each as the other.
- ☒ Rather than segmenting partners by type or activity, vendors are encouraged to employ a higher-level demarcation that highlights mutual exclusivity, such as technology partners or go-to-market partners. Partner typologies still exist within the program model, but they are there to define entitlements based on achievements and act as a high-level segmentation of partners within the core program.
- ☒ Vendors can use partner program models to help eliminate the risk associated with significant changes to existing programs. Vendors should use this document and the available self-assessment tool to review their programs and understand which elements of their programs are most beneficial and which need the most retooling.

LEARN MORE

Related Research

- ☒ *Architecting Partner Programs for Success* (IDC #31612, July 2004)
- ☒ *Microsoft's Partner Program: The Next Generation Goes Boldly Beyond* (IDC #30353, October 2003)
- ☒ *Building an Alliance Measurement Dashboard: A Profile of Cisco Systems* (IDC #29246, April 2003)
- ☒ *The Relationship Between Certifications and Partnership Programs: Alignment Is Key* (IDC #28374, December 2002)

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