

Certified Channel Manager (CCM)

About This Course

General overview for ALL Channel Marketing, Operations & Sales Managers of all types
Medium level - tactics, doing some - guiding most

1 Channel Management Defined

[Industry terminology](#)
Direct vs Indirect Channels - Why Use a Channel?
Reseller continuum - models by type
Purpose for distributors - Pros & Cons
Alternative channels (Affiliate, OEM, Alliances, Affiliate Publishers)
Channel by product type & geography
Competitive channel analysis - Best practice

2 Preparing Your Company & Management for Change

Channel Success & Failures
Educating Management - Proper Expectations
Channel Mentality - Us vs Them
Smooth Transition from direct to channel
Areas of Control vs Influence
[Roles of channel sales & channel marketing](#)
Minimizing channel conflict
Aligning Channel Compensation - models
Roll-out phases and typical timelines

3 Phase I - Defining (or re-defining) Channel Program - Elements

Four phases of a channel program
What resellers look for when selecting a vendor partner
Partner Program *Checklist*
Levels - purpose, delineators
Portal, Matrix, White Papers, PowerPoint, Forum, Collateral
Tech & Sale Support (training, evals, RMA, Configurator, Certification)
Lead Gen - leads, Bud desk, Reseller Locator
Policies: Leads, MDF/Co-op, Certification, NFR
Deal Reg - vs Territories
Requirements & Partner Experience

4 Phase II (Part I) - Program Setup (systems, policies, process)

Partner profile, type (vertical, affiliate, lifetime deals, online-retail-VAR-MSP-SI, OEM)
Portal / PRM - how to select, set up, key elements
Reseller application – information to capture (partner profiling)
Reseller & Distributor Agreements – key elements
Policies: Leads, MDF/Co-op, Locator, Deal Registration, NFR, RMA
NFR process, special promotions, jump-start
Reseller Type/levels/Margins & How to Pay

5 Phase II (Part 2) - Content - Overview

Competitive Matrix
Product positioning (3-5 reasons to buy)
Persuasive document - How to Articulate
PowerPoint - Reseller specific
25/50/100 word description
Market Info, Graphics, white papers, case studies, videos
Pricing and Price List - Margin details, how to pay
Demo Scripts - Product & Portal
SEO - landing page
Training & Certification
Retail (Kits: sell sheets, disti numbers, POP, specials)

6 Phase III (Part 1) - Recruiting (Strategy)

Decisions – do it yourself or outsource? Pros/Cons
Affiliate Publisher Models (Netscape, AOL)
Aggregators
Navigating distribution agreements
Creating the reseller profile (Ideal Partner Profile (IPP))
Partner Optimizer - perfect matchmaking
Guerilla/Chanimal approaches to recruiting
Competitors & Alliances
Recruiting – what really works
Alternate channels - affiliates, retail, OEM, rep firms

7 Phase III (Part 2) - Recruiting (Tactics)

Building Your Database
Best sources to find resellers
Software to capture names
Direct response format (e-mails, postcards)
Persuasive Format - articulate / examples
Recruiting national and Regional
Recruiting independents - Marketing campaigns
Email, PR, Advertising, Direct Response, Events
Roadshows (alliances)
One-on-one phone dialogues

8 Phase III (Part 3) - Recruiting Alternative Channels

Agents
Major Accounts (Accenture, IBM Services, CapGemini, CDW)
Original Equipment - OEM
LifeTime Deals
Distributors & Market Places
Retail (local, regional, national)
Online resellers & Mail Order
Affiliate Recruiting
Alliances - as a channel

9 Phase IV (Part 1) - Enablement

Channel Care vs Neglect
Initial Onboarding - Follow-up Worksheet (Tracking)
Acceptance process
Orientation Meeting - How to Get Attendance
Marketing Meeting - Plan of Action
SEO Landing Page & Email Campaign
Quarterly promotions & Thank You responses
Newsletters and Promotions
Refine Levels, set Quotas & Certification
Ongoing Training - Product, Sales, Marketing

10 Phase IV (Part 2) - Channel Motivation

Three phases of a new reseller
Creating loyalty within the channel
[What works – spiffs, rebates, contest, NFR's](#)
Field Management – model calls & coaching calls
The Game of Work – tracking
Integration – inside sales, field sales, FAE's, channel sales
Channel maturity – weeding out non-producers
Increasing dedication & barriers to entry

11 Refining or Fixing Your Program

360 Review Analysis
Creating & leveraging a reseller partner council
Ongoing recruiting – replacing non-producers
The plan of action – details with timelines
Q & A to address common channel questions

12 Channel Sales - Overview

Prospecting
The Approach & Voice Mail
Presentation Skills & Persuasive Demos
Group Presentations
Price Savings Build-Up
3rd Person Selling
Closing Techniques
Overcoming Objections
Sales Management (quotas, game of work, goals, motivation)

13 Channel Operations

CRMs, PRMs, other Software Systems
Industry ratios, time lines, expectations (Accenture 2017 study)
Forecasting models
Budgets
ROI - Channel Program, Training

14 Resources (for You & Partners)

Websites
Rep Firms - Retail to System Integrators
Software
Research & Publications
Consultants
Reseller Training

Certified Channel Marketing Manager (CCMM)

About This Course

For anyone existing or new to marketing - Channel Specific
DETAILED tactics - Shows you HOW to put it together
Mid level for alternative channels, no sales training
About 10% Channel Mgmt overlap - in case you didn't take another course

1 Channel Marketing - Company/Product/Channel

[Roles of channel sales & channel marketing](#)
[Industry terminology - level-set team](#)
[Channel overview \(by channel type\)](#)
Channel Marketing job description & requirements
General Marketing vs Channel Marketing (not product, naming, corp - but holistic)
Channel Marketing - comp plan models
Bandwidth resources - internal & interns (ads, qualifications, interviews)

2 Program and Policy Creation - Best Practice - Setup

Define channel program - applicable elements
Reseller Agreements
Distributor Agreements
Leads & form
MDF / Co-op & form
Reseller locator
Deal Registration & form
NFR - SaaS, Software, Hardware, plus Reseller Recommendation Rate
Promotions - details

3 Channel Content - Separate Tactical Modules

Positioning Overview - Creative approaches
Competitive matrix product - Fastest Approach
Create Feature-Based Positioning
Persuasive Document - Articulating Positioning
Naming, branding, tag-lines (if not done already)
PowerPoint - Five stages & Types
25/50/100 word description
Market Information
White papers
Case Studies
Product Videos
Landing Page - SEO keywords, setup
Testimonials - How to Get, Leverage
Product Demo Script
Pricing - How to, Format (complete if not done)
Determine Margins
Finalize how to pay
NFR - how to deliver
Logo Usage Guidelines
Portal / Orientation demo script

4 Systems & Processes

CRM - selection & setup
PRM - selection - what to look at each channel stage
Portal
Pre-built
ISPs vs In-House servers
Forms - testing, captcha, maps, email notifications setup
Marketing Automation
Email systems
Email process
Email cleaning & verification
Database / Excel cleaning systems
Database management
Web push notification
Configurators & Price Calculators
Database sources
LMS Systems
Resources: Data scraping, WordPress help
Form creation
Integration -portal with CRM/marketing automation

5 Mass Recruiting

Roles: Channel marketing mass, Channel Sales one-on-one
Building the database - sources above
US vs International recruiting - watch for exclusivity
Direct response - email campaign (send, clean, reply, repeat)
Direct response - postcards, telemarketing outsource/train sales
PR - press release, channel contacts, channel awards
Newsletter Sponsorship
Ads - reseller publications
Distributor events & emails (if applicable)
Reseller trade shows
Rep firms, matchmaking - retail, but also VARs
Affiliate networks - if applicable (SaaS)
Roadshows - Alliances
Alliance cross-marketing to partners, prospects
Recruiting Phone dialogs - for Sales
Telemarketing - hire or internal (Channel Sales)

6 Enablement

Follow-Up Worksheet - Process - Block & Tackle
Setup & Approval
Orientation meeting
Marketing Meeting - Agenda Process - Change Roles (Regional Marketing)
Landing Page setup, test, revise
Email campaign - template
Events - lunch and learns
Syndicated Content
Lead referral template - lead dissemination
Create promotional calendar - master
Joint partner promotions & MDF - local, regional, national
Setup Partner Promotions, Spiffs, Contests
Newsletters - what to include, approach
Thank you responses
Resources: partner promotional groups

7 Advanced Partner Marketing

Identify top 5 partners in each region to help - create plan of action (Build their business)
Partner Assessment
Partner positioning - what makes them unique
Create high-level matrix, Persuasive format, 3-5 reasons to buy
Articulate on website & Optimize for leads
Devise marketing promotions to build their business

8 Product Training - Certification

Demo script, detailed product training to script, training for questions and support
LMS - sales, basic product, advanced product, certification
Define certification training (product, support, marketing, sales)
Create training materials - use LMS system
Training follow-up Worksheet
Organize helpdesk, partner support

8 Setup/Refine program & levels, quotas, certification

Ratios, Timelines, Tracking, Benchmarking Analytics & Reporting
Annual partner conference
Create reseller partner council & setup calendar
Setup 360 review survey - compile, modify program
Review channel metrics and sales
Review break points & setup/update quotas (in conjunction with sales)

9 Channel Operations

Sales forecasting meeting (compile data) - with Channel Sales
Channel budget
Industry ratios, ROI

10 Resources (for You & Partners)

Websites
Rep Firms - Retail to System Integrators
Software
Research & Publications
Consultants
Reseller Training



Key: [Blue](#) text are base-line concepts that overlap between the different courses

Note: Channel Management covers the most areas and a cross section of all other areas, but the tactical DETAILS are in the Marketing, Sales & Elective sections.

Certified Channel Sales Manager (CCSM)

About This Course

For new to advanced channel sales
Direct sales adding channel sales
Detailed sales strategy and sales skills
About 10% overlap - but this is much more tactical
Covers tradition channels - Electives covers alternative channels

1 Channel Sales

[Roles of channel sales & channel marketing](#)
[Industry terminology - level-set team](#)
[Channel overview \(by channel type\)](#)
Knowing your channel program
Agreements, policies, process
Know partner orientation process - decide involvement

2 Aligning Management & Hiring Your Team

Training Sr. Management, setting expectations
Your channel type and needs - vertical vs horizontal, retail, smb, enterprise
Job description & Requirements
Comp plan - Industry Best Practice
Territory setup - new vs existing
Dividing Inside Direct sales vs Channel Sales
Recruiting your channel sales

3 Essential Onboarding - Channel Sales (new and existing)

Orientation & Timelines
Product & company knowledge - positioning, matrix, features
Channel orientation for new channel person
Understanding your own channel program
Portal, agreement, policies, support, promos, timelines
Partner follow-up worksheet - channel marketing w/sales
Portal demo script - cross trained
Persuasive format
Product demo script, presentation skills, master and tested
Sales training, objections, generating a quote
Product - detailed training

4 Systems & Processes

CRM - have to LEARN it
PRM - if applicable
Portal - how to demo (channel marketing manages)
Process: Lead management, tracking, status, HR policies
Analytics - tracking

5 Recruiting Partners

How to Re-launch new program
Resurrecting existing partners (basics)
Partner profile - Ideal Reseller Profile (competitor's partners)
Database - channel marketing should setup
Recruiting smaller and nation's largest resellers
Recruiting Top Ten largest resellers
International differences (caution - exclusivity)
Alternative channels - recruiting basics
Calling: hard-to-catch, warm and cold list calling
Phone Dialogues
Follow-up & Closing

6 Partner Onboarding & enablement

Channel Marketing / Channel Sales - how to split roles
Partner follow up Worksheet - channel marketing, channel sales
Introductions
Partner Quotas - standard quotas by level
Monthly partner plan & promotions - with Channel Marketing/Sales
Jointly manage co-op, MDF with channel marketing
Setup regional Promo Calendar

7 Territory Management

Policies - reports, meetings
Account management - virtual partner management
Typical Schedule - Pain Relieving Work
Channel Sales Management
Situational Leadership
Game of Work - Sales by the Numbers
One Minute Manager
Baseline Goal Setting - with Channel Mgrs & Partners
Deal Registration - follow up
Lead follow-up, assistance, co-assigning
Joint Calls & Identify Accounts
Field Coaching - High sales ratios first (or mess them up)
Model Calls
Emotional Bank Accounts - Utility to Friendship
[Motivation - What Works](#)
Jointly setup Spiffs, contest, specials

9 Sales Skills - Can't coach if you can't sell

Know how to sell your own product - some success
Must know ratios, increase personal skill (so can coach channel)
Soft Skills - Situational Selling
Hard Skills
Pre-Approach, Prospecting, Approaches that WORK
Appointment & The Setup
Presentation Skills & Personalized Demos
Demo Mechanics & Group Presentations
Group Presentations
Dress for Success
3rd Person Selling
price Savings Build-up
Closing Techniques
Keeping it Closed
Advanced Closing
Overcome Objections
Sales Resources

8 Operations & Ratios

Sales Forecasting
Budgeting - based on sales, regional MDF
Weekly Reports
Sales forecasting units/partner/direct vs indirect
Territory quotas
Partner quotas - existing, when to setup, how to split

Certified Channel Manager Professional (CCMP)

Requires CCM certification, plus requires EVIDENCE of both knowledge and skill. Must submit samples, results and evidence of growth & success. Must be completed within 6 months of CCM certificate. See Worksheet.

Certified Channel Manager Professional (CCMP-I)

Requires CCMP, CCSM, CCMM and *all* electives as prerequisites. It also includes additional course material on instructional methodologies, metrics and building a consulting practice. You are then certified to instruct and consult with channel clients--in all tech industry segments.

1 How to build a thriving consulting practice

Setup - determine market, your unique positioning, pricing, four P's
Marketing promotions - SEO, intro, free assessment. Social media
Closing - dialogues, sales manual
Consulting engagement - agreements, process

2 Alliances

Finalize "why you," how you make more money
Identify prospects
Contact & Engage
Extreme follow-up - trackable revenue

3 Scaling

Internal bandwidth - how to increase
How to build out your team

4 Finale Interview - Capabilities validation