



Overview

The most successful technology companies - like Microsoft, HP, IBM, Citrix, VMWare, Adobe, Symantec, Cisco, Intel, etc. - could not have gotten the market saturation they have today without leveraging Reseller Partners ("The IT Channel").

Why? Because Resellers have established track records and personal relationships with dozens to hundreds of business clients each, who trust them and will consider their recommendations with more weight than a direct cold call, online ad campaign or company-driven webinar. If you're a SaaS company that is planning for long term growth and success, leveraging Resellers needs to be an important consideration and can be an extremely powerful and critical component of your strategic plan.

Building a world-class reseller program requires planning, processes and strong, consistent execution.

As the leading marketplace to match SaaS Vendors with Reseller Partners, SaaSMAX is excited to offer the "**Crossing The SaaS Education Series,**" a five part program for B2B SaaS Vendors lead by SaaSMAX and channel expert Ted Finch (aka, Chanimal), specifically developed for emerging SaaS Vendors.

Crossing The SaaS Education Series is all stuff, no fluff, packed with important, actionable information. There are no sponsors, advertisers or promotional pitches to distract you. The presentation style is fast (not boring) and densely filled with systematic detailed instructions to build a world-class reseller program.

Whereas you would normally pay thousands of dollars to a consultant for the information and expertise provided in this series, SaaSMAX is offering this program to you in an online group setting for pennies on the dollar, giving you premium access to leading experts and proven methods for developing world class Reseller Programs for SaaS companies. **In fact, if you successfully recruit just ONE good reseller partner, this program will have paid for itself.**

Who Should Attend?

SaaS CEOs, CMO's, CRO's, VP's of Business Development and/or VP's of Sales, SaaS Founders, SaaS Investors, CAMs, existing Channel Managers (new or experienced (who may have never setup a "new" program)), and anyone else who's a stakeholder in your SaaS company's success.

About Your Presenters

Clinton Gatewood, SaaSMAX VP Reseller Engagement

Dina Moskowitz, SaaSMAX CEO

Ted Finch, SaaSMAX CMO. Sessions 2-5 are lead by Ted Finch, aka Chanimal (short for Channel Animal), one of the top channel experts in the entire high-tech industry, having launched over 500 products into the channel for over 200 vendors (including Microsoft, HP, Adobe, Corel, Intel, Aldus, Epson, AOL,

WordPerfect, Novel, Autodesk, Citrix, IBM, Sony, Disney, Mitsubishi, Lotus, DCA, Netscape, plus over 100 start-ups or re-boots with desktop, consumer, enterprise and SaaS products).

Mr. Finch is a former VP of Sales and Marketing with TAC (now called MarketStar), a VP at Goldmine Software, VP at Harcourt, Sr. VP at Motorola, VP at GE, and CEO of Chanimal.com. In addition, he helped form Red Storm Entertainment with Tom Clancy, and led the marketing team that published AOL and Netscape Navigator, the #1 best-selling software in the world at the time.

Mr. Finch sits on the board of advisors of several high-tech start-ups, on the Channel Advisory Council, has spoken at dozens of industry conferences and has been quoted by over 100 publications including PC Magazine, Retail Week, Computer Reseller News, Entrepreneur Magazine, Channel Advocate, Newsweek, and Fortune. He also runs the only certification program for channel managers within the high-tech industry.

LESSON 1: CHANNEL PARTNER PROGRAMS 101-110 - YOUR COMPETITIVE ADVANTAGE

Curriculum

The first session is an introduction to channels and helps you make the decision, "Should we use resellers?" Following are some of the topics covered:

- What is a Channel Partner Program & How to Leverage it to Gain a Competitive Advantage
- What is "The IT Channel" and why do you need to know about it.
- Who are Channel Partners / Resellers?
- Benefits of Launching and Building a Channel Partner Program
- Types of Channel Partner Programs that are most successful for SaaS companies

This is one of the only sessions where you have three experienced SaaSMax leadership members providing insights and feedback on how the channel works, how to leverage it and what has to be in place to scale and make it work for you.

Take Away

Answers the question, "Should we use resellers?" What you should expect, time frames and required resources.

LESSON 2 – DEFINING YOUR RESELLER PROGRAM

Curriculum

The first phase of creating a reseller program is deciding which elements to include. Within this session we cover the following:

- Definitions. The difference between an affiliate, reseller and OEM channel model. Also, the differences in requirements, quotas, certifications and support between each type.
- Levels. The typical levels, why your program should have them and how they automatically increase reseller loyalty and exclusivity.
- Portal Content. The buckets of content prioritized by must have, should have and could have-- including market information, competitive analysis, templates, presentations, system configurators, online RMA, bid desks, forums and more. You'll identify the top three things most requested and the sequence of deliverables so you can setup and then build out your reseller program.
- Tech & Sales Support. How should you train, handle tech and sales support, handle your annual partner meeting, and certification.
- Deal Registration. How most vendors determine who claims a deal--without territories.
- Front and Back-End Discounts. Includes margin splits for registered deals, rebates and ways to reward volume.
- Reseller Locator. How your prospects can find your partners if they want local sales, training and support.
- Not for resale - NFR copies/access. Should you offer it? What are the benefits?
- MDF & Co-op. What's the difference and should it be part of your program.
- Requirements. Partners must apply and qualify, but what about quotas and when do you set them?
- Reseller experience. Why you should have a pre-sign up phone number, grid of program levels, request a distributor number, along with expectations to respond quickly and how to show you are easy to do business with.

Nothing is fluff or theory--it is a detailed and tactical review of everything that should be decided and completed prior to building and launching a partner program.

Materials

- Slide Deck. You will get a copy of the slide deck so you can share it with internal team members.
- Program Definition Spreadsheet. It contains all of the elements (along with definitions) of a reseller program that you can select from. You can follow along during the session to define your own program that is tailored to your market and product type.
- Sample portal. Access to a model portal site that contains samples and will explain how to put together each element.
- Video recording. Review afterwards or with your team to remember all the tips and tricks.

Take Away

You will know about each element of a reseller program, can determine what your program should and should not have, and have an actionable checklist of deliverables to create your own reseller program. You will know what to formalize so you can scale completely. The subsequent sessions will help you put together that material.

LESSON 3 –CREATING THE POLICIES FOR YOUR RESELLER PROGRAM

Curriculum

This is a continuation of the prior session. You can still attend without the previous material, but we will go right into the policies--not the terminology or core elements of the program (which should have already been defined).

After you have defined your reseller program, you now have to create the content. Some of it includes marketing collateral (PowerPoints, competitive matrix, product slicks, white papers, prices list, market info, etc.), but also the policies, rules and processes that will make your program run smoothly on its own, motivate your resellers and avoid common problems (including being sued if your program causes conflicts and disputes). This includes the following:

- Program introduction copy. This is the copy that sits outside of your portal to answer the reseller's 2nd most common question, "Can I make any money with your product?" It has all the elements that resellers look for, including several items that are often missed--but are critical.
- Division of levels. Why, how to determine, phases for a new program.
- Reseller margins. How to determine and what are the differences for a SaaS application.
- Reseller application. This is not a "click here to request more information" link, nor the minimal information to get a lead--this is a detailed reseller "job" application that helps you profile the reseller. Too many vendors do not get the partner profiles before they joined--and later don't know why some succeed and others don't. We review the essential elements you must have and why.
- Reseller agreement. In layman's terms, you'll learn the primary elements of a typical reseller agreement, including what you must have to indemnify each company, reduce tax liability, allow you to terminate, help ensure your brand is protected, allow you to pre-approve reseller collateral, reduce the chance you are not locked into any "Favored Nation's Clauses," split US vs International regions, determine jurisdiction if there are disputes, and more.
- Lead policy. It is critical if you plan to send partners leads that set expectations, including time to claim, follow up, and required reporting.
- Not For Resale (NFR) policy. Resellers sell what they know and they know what they sell--this will help you to set the checks and balances to ensure they can get your product to learn and use, without abuse.
- Deal Registration. We typically do not set territories. Instead, we allow resellers to register their deals. You'll learn the reasoning along with the checks and balances to make this approach work.
- Training, certification and quotas. How and when to set it up.

Materials

- Slide Deck. You will get a copy of the slide deck so you can share it with internal team members.
- Policy Word Document. You will receive a copy of all the policies, agreements and templates used in the meeting. You should be able to follow along and personalize your own copies during the presentation. You may wish to pass some items, like the reseller agreement, through legal counsel--although the template we review is fairly standard and has been used hundreds of times.

- Sample reseller agreement. You'll get a template you can model for your own partner agreement.
- Sample Portal Site. In addition, you will have access to a sample portal site that shows how all of the items are setup for the resellers.
- SaaS Margins. How to determine your margins, payout, who pays who. Includes industry avgs.
- Video recording. You can review this afterwards with your team to ensure everything is completed.

Take Away

You will have understood and prepared most of the elements for your own reseller program--plus you'll learn the unique differences when you start a new program (versus a mature program that often includes qualifiers and barriers to entry). You should be ready for recruiting when you've finalized these items (along with any other deliverables that are unique to your company (competitive matrix, PowerPoint, etc.).

LESSON 4—RESELLER RECRUITMENT & STRATEGIC ALLIANCES

Curriculum

We'll complete a high-level review of everything that needs to be completed before you start the second phase of a partner program: recruiting (including the program definition, the policies, the portal and collateral). We'll discuss the following:

- Product positioning. You will need to provide 3-5 reasons someone would be a fool not to consider your product. This is critical for your recruiting emails and script. Your product doesn't have to be the market leader, but resellers must see an angle, something that makes you better and that you don't have another "me too" product.
- Recruiting strategy. We often start with an existing generic database to get your first 10 partners (they are the test partners). Then we do a counter-strike (builds your product while diluting theirs) and go after competitors (or similar) vendor's partners to get our first 50 partners. We then
- Recruiting email and template. You'll learn about a 3 step email process and the elements typically covered within the initial recruiting email.
- Call scripts. Good resellers are busy and are hard to catch in the office. You'll learn the tips that get them to return calls, along with the dialogs to get their interest.
- Reseller database. Where to get names and what information you should capture.
- CRM and email systems. How to setup your database, run campaigns and track your partners.
- Expectations & phases. You'll learn how long the recruiting process should take to get your first set, ongoing recruiting, how soon to take through orientation, setup your marketing meetings and more.
- Alliances. We can recruit on our own partners one by one, but the fastest way to get a LOT of partners, and the scale quickly, is to form an alliance with non-competitive vendors whose resellers target the same prospects. We'll cover several examples, then the basics of how to set these up and also reference other program material (video, kit) with detailed instructions to execute.

Materials

- Slide Deck. You will get a copy of the slide deck so you can share it with internal team members.
- Positioning Kit. Includes a slide deck on positioning, along with a video link that shows examples and explains the positioning process.
- Reseller worksheet. The template you can use to track your partners from their application through orientation, their first sale and the marketing meetings.
- Database setup instructions. Details on the fields, how to scrub your database, import into most popular CRMs and more.
- Sample email template. Showing the items typically covered.
- Call scripts. Including what to cover, how to overcome objections and get return calls.
- Reseller database. A small sample database in Excel showing the typical fields and data you will want to capture.
- Alliance Kit. Includes slide deck, link to instructional video, sample intro letter, agendas, follow up worksheet, a detailed plan of action and much more.

- Video recording. You can review this afterwards with your team to ensure everything is completed.

Takeaway

You will learn what works and doesn't work, both the strategy and detailed tactics on how to recruit partners, the critical elements to ensure they respond, where to find your database and how to form alliances for recruiting your best partners.

LESSON 5—PARTNER ENABLEMENT

Curriculum

Ok, so you've got some resellers. What do you do now? This is where most vendors fall down, expect the channel does all the work without them and quickly get into channel neglect. The key is to treat your partners like regional offices and do exactly what you would do if they were on the payroll--and you'll get the same success. We'll cover the following within Phase three of a partner program: enablement.

- Reseller worksheet. We'll review in more detail the follow up worksheet to ensure every partner gets the approval email, sees the portal, product, knows how to order, and you setup the marketing meeting.
- Initial orientation. What to cover, who should attend, how soon should this occur.
- Product demo. What you should and should not show - how this is a model for the partners to follow.
- Portal overview. What to cover, including the typical problem areas you should stress.
- First marketing meeting. The purpose, agenda, and deliverables.
- Ongoing regional marketing. How your role changes once they come on board, how to ensure resellers generate their own leads.
- Promotional templates. We'll review the direct response and SEO templates as examples of how to help your partners.
- Lead dissemination. What is the process and why you should send them leads. Will review a detailed worksheet showing the lead process from a trial to the close.
- Sales help & roles. How you divide the internal roles and why and how you should help them with their initial sales.
- Sales recognition & motivation. Everyone loves to be appreciated--especially sales people. How to track and recognize their efforts.
- Sales quotas, certification levels and transitioning. How and when to setup your certification levels correctly.
- Partner promotions. How to setup a promo calendar, along with what types of promotions to run. We'll also touch on spiffs vs training.
- Partner Councils. We'll discuss ongoing refinement of your partner program and how to get reseller input.

Materials

- Slide deck. You will get a copy of the slide deck so you can share it with internal team members.
- Reseller Follow-Up Worksheet. The template you can use to track your partners from their application through orientation, their first sale and the marketing meetings (also included in prior session--in case you didn't attend).
- Demo Tips and Tricks. How to give persuasive demos--so you model it for your partners.
- Sample Portal Demo script. Step by step instructions that explain what you would cover in your orientation.
- Marketing meeting agenda & sample. What do you cover with your partners to discover what has and has not worked and help them market your product.
- Marketing templates. Jumpstarts you with a direct response mail/e-mail template, plus an SEO template (so they can put your product on their site and get their own traffic and leads).

- Video recording. You can review this afterwards with your team to ensure everything is completed.

Takeaway

You will learn what it takes to help your new sales force flash up to speed on your product and resources, how to place an order, setup their website to sell your product and start to promote it. You'll also learn how to keep the channel motivated, setup regional promotions and eventually transition from your initial program to the final one (once you have enough sales & support data to finalize). You now have a channel that knows how to sell and promote your product--and a repeatable process to scale your company and achieve your expected returns.