

Channel Partner Business Plan Template

Support Tool from the Certificate in
Channel Management



Background to this Template

This is an outline template and is intended to be used in conjunction with training delivered through the Channel Institute certificate courses. It is not intended as a standalone document.

Where you see the  icon it refers you to further learning on one of the courses.

- ✓ Learn more about the certificate courses at:
<https://www.channelinstitute.com/courses>

Stakeholders



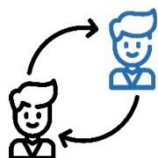
Who are the key stakeholders?



What are their needs?



Who needs to attend planning meetings?



Who needs to attend review meetings?



Who from each party will own each KPI?

Joint Vision & Mission

- ✓ Vision
- ✓ Mission
- ✓ Goals



Ref. module 2 of
Certificate in Channel
Marketing: “*Partner
Business Strategy*”

e.g. The *Mission* should...

- ✓ Be guided by achievement of the Vision
- ✓ Have a medium-term horizon: 3-5 years
- ✓ Be quantifiable with objectives and goals
- ✓ Match business and technology cycles
- ✓ New mission for a new S-Curve
 - ✓ e.g. Microsoft*
 - ✓ 1980: “The dominant desktop operating system”
 - ✓ 1990: “The dominant personal & SMB applications”.

Shared Strategy & Objectives

- ✓ Joint S.W.O.T
- ✓ Joint P.E.S.T.E.L
- ✓ Joint Strategy
- ✓ Joint Plan



Ref. module 2 of
Certificate in
Channel
Marketing

STRATEGY DEVELOPMENT CANVAS



SITUATIONAL ANALYSIS		NEW STRATEGY	
ASPIRE	VISION: Editable... MISSION: Editable... VALUES: Editable...	TARGET MARKET	SEGMENT DESCRIPTION: Editable... TARGET PERSONAS: Editable...
LOOKOUT	EXTERNAL OPPORTUNITIES: Editable... EXTERNAL THREATS: Editable...	VALUE PROP	SUSTAINABLE COMPETITIVE ADVANTAGE: Editable... COMPELLING VALUE PROPOSITION: Editable...
INTERNAL	CURRENT STRENGTHS: Editable... CURRENT WEAKNESSES: Editable...	OFFERINGS	TECHNOLOGIES: Editable... SOLUTIONS: Editable...
GAP	ATTRACTIVE MARKETS: Editable... STRATEGIC FIT: Editable...	CAPABILITIES NEEDED	TO ACHIEVE OUR STRATEGY WE MUST INVEST FURTHER IN: Editable...

Example – Objectives & Strategy

Objective1: Become the standard solution provider in X region to provide Y solutions, working with key Vendor partners

Strategies:

- Identify key partners in segment and develop go-to-market strategies

Objectives/Metrics:

- Partner with ABC SI to bid a solution in 10 states, with 3 wins
 - Partner with XYZ partner to bid 10 projects, with 3 wins
-

Objectives & Strategy

Overall Objective:

Goal 1:

Strategies:

Metrics:

Goal 2:

Strategies:

Metrics:

Goal 3:

Strategies:

Metrics:

Market Positioning

- ✓ Core Competencies
 - ✓ For each company?
 - ✓ As a joint solution?
- ✓ Differentiators
 - ✓ For each company?
 - ✓ As a joint solution?
- ✓ Value Proposition
 - ✓ As a joint solution



Ref. module 6 of
Certificate in
Channel
Management:
*“Market
Positioning”*

Value Proposition Formula

- ✓ Consider using this formula with your partner:
 - ✓ We help [identify your ideal prospects] that [need help with the pressing problem you address] succeed by [outcomes/results you deliver].
 - ✓ Unlike [alternatives], [your solution] [describe main benefit/why your solution is the best choice] as demonstrated by [evidence you'll deliver on promise].



Ref. module 6 of
Certificate in
Channel
Marketing: “*Value
Proposition*”

Goals & Expectations

- ✓ Short Term:
- ✓ Medium Term:
- ✓ Long Term:

- ✓ Topics should include:
 - ✓ Product integrations
 - ✓ Marketing support
 - ✓ Sales support
 - ✓ Technical support (incl. Certifications)
 - ✓ Product support
 - ✓ Pricing
 - ✓ Communication methods
 - ✓ Reporting



The Joint Business Plan

- ✓ Key areas:
 - ✓ Partner-specific data
 - ✓ Joint Marketing Plan
 - ✓ Joint Sales Plan
 - ✓ Budgets
 - ✓ KPIs
 - ✓ Definition of success.



Ref. module 4 of
Certificate in
Channel
Management:
*"Joint Business
Planning"*.

Resourcing

- ✓ People & Responsibilities
- ✓ Finance
- ✓ Training & Certification
- ✓ Pre-Sales, Sales, Customer & Technical Support



Target Markets & Customers

- ✓ Top 5 joint customers
- ✓ Top 5 joint prospects
- ✓ Ideal customer profile
- ✓ Target market



Ref. module 4 of
Certificate in
Channel
Management:
*“Joint Business
Planning”*.

Segmentation & Target Audience

B2B (FIRMOGRAPHICS)	B2C
Industry or SIC code	Demographic
Company Size (Employees, Revenues, Assets)	- Age, Gender, Income, Social Class, etc.
Geography	Geographic
Structure (e.g. Parent or Subsidiary)	- Country, State, City, etc.
Job Titles	Psychographic
Behaviour (e.g. Already uses X product)	- Lifestyle, Personality
Customers (B2B or B2C)	Behavioural
Etc.	- Previous customer / visitor, Usage, Frequency



Ref. module 4 of
Certificate in
Channel
Marketing:
*“Segmentation &
Targeting”*

Joint Sales & Marketing

- ✓ Lead sharing.
- ✓ Lead nurturing and progression process.
- ✓ Shared MarTech platforms and processes.
- ✓ Shared data management.



Ref. module 7 of
Certificate in
Digital Co-
Marketing: *“Lead
Progression”*



Ref. module 9 of
Certificate in
Digital Channel
Management:
*“Data
Management.”*

Joint Marketing Calendar

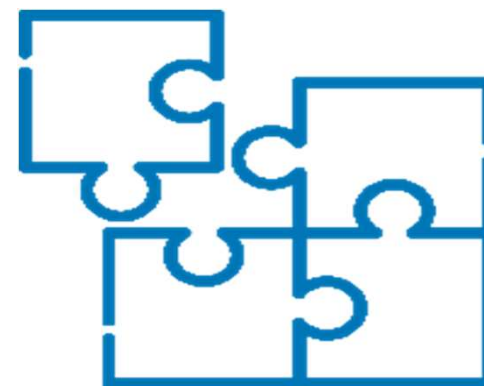
CAMPAIGN TYPE	PROJECT GOALS	Q1			Q2			Q3			Q4		
		Jul-16	Aug-16	Sep-16	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17
Personal Marketing													
Garment Ads													
Local Marketing													
Local Ads													
Public Relations													
Media Releases													
Statements													
Content Marketing													
Sponsored Content													
Landing Page													
Blog Posts / eBooks													
Social Media													
Twitter													
Facebook													
Instagram													
LinkedIn													
YouTube													
Online													
Blog													
Website													
Video Ads													
Video Ads													
Email Newsletter													
Web													
Development													
Display/Click Marketing													
SEO													
Market Research													
Competitor													
Import Studies													
Base Campaigns													
Display Ad													
Display Ad													
Display Ad													

Sales Commitments

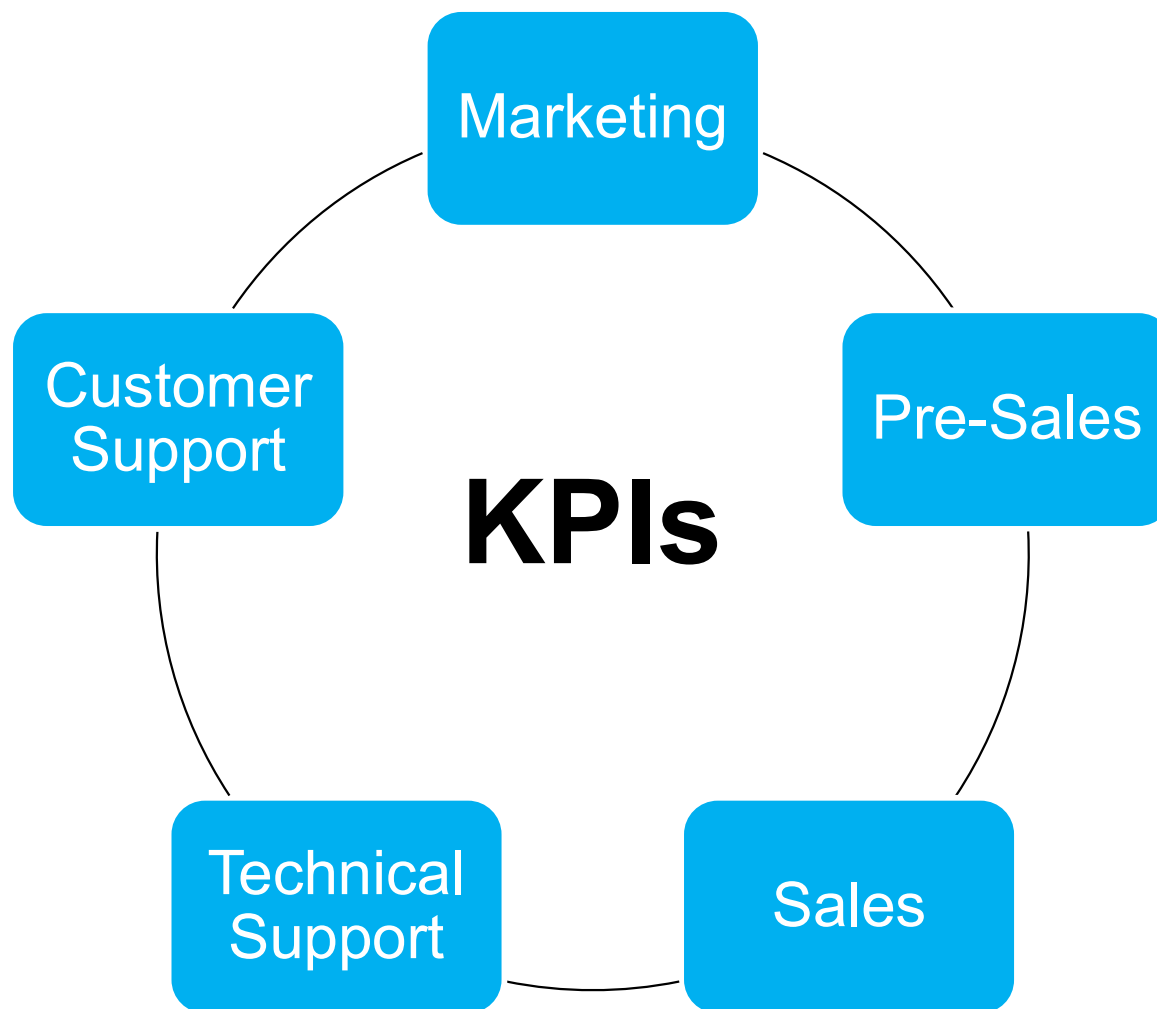
	Q1	Q2	Q3	Q4
Solution A				
Solution B				
Solution C				
Solution D				

Joint Activity Framework

- ✓ KPI's
- ✓ Activity Schedule
 - ✓ Marketing
 - ✓ Technical
 - ✓ Sales
 - ✓ Other



Steering Wheel



Review & Adjust

- ✓ Preferably conduct quarterly.
- ✓ Did both parties meet the goals of the plan?
- ✓ Were the goals realistic?
- ✓ Did both parties accomplish everything they set out to achieve?
- ✓ What were the obstacles to success?
- ✓ How can they be addressed in future?
- ✓ Revise the plan accordingly.
 - ✓ Agree next steps, goals and campaigns.
 - ✓ Agree next review meeting.



Become a Certified Channel Professional



Learn more about the certificate courses at:
<https://www.channelinstitute.com/courses>