

Channel Partner Marketing Plan Template

Support Tool from the Certificate in
Channel Marketing



Background to this Template

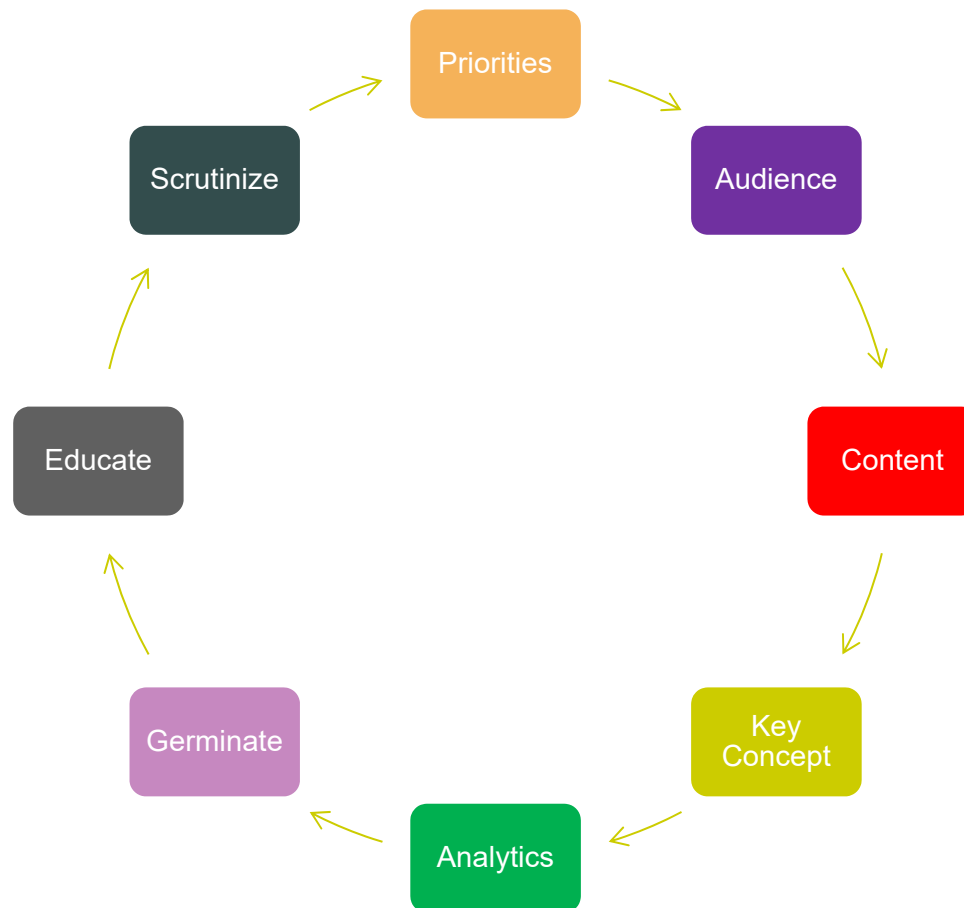
This is an outline template and is intended to be used in conjunction with training delivered through the Channel Institute certificate courses. It is not intended as a standalone document.

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>



P.A.C.K.A.G.E.S



*Throughout this
template we will
refer to our
proprietary partner
marketing planning
methodology:
P.A.C.K.A.G.E.S™*

Stakeholders



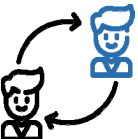
Who are the key stakeholders?



What are their needs?



Who needs to attend planning meetings?



Who needs to attend review meetings?



Who from each party will own each KPI?

Situation Assessment



Company, Products, Team & Business Strategy



Business, Marketing & Sales Goals



Your Differentiators, Strengths & Weaknesses



Previous Marketing Success & Challenges



Customers & Target Markets



MarTech



AOB

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...

Resourcing

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



Sales Lead Commitments

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

Market Positioning

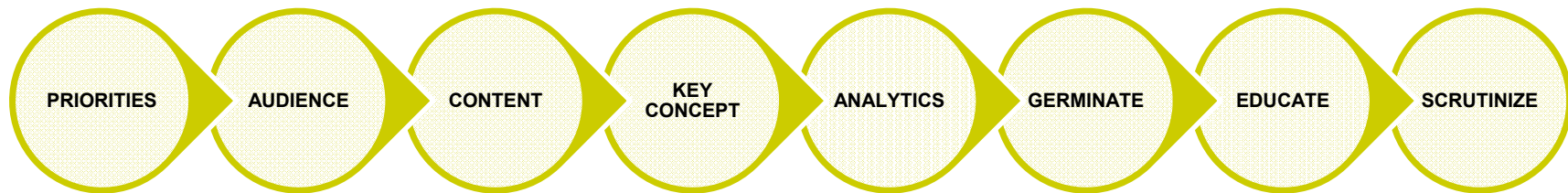
- ✓ Core Competencies
 - ✓ For each company?
 - ✓ As a joint solution?
- ✓ Differentiators
 - ✓ For each company?
 - ✓ As a joint solution?
- ✓ Value Proposition
 - ✓ As a joint solution



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

Partner Marketing Methodology

P A C K A G E S™

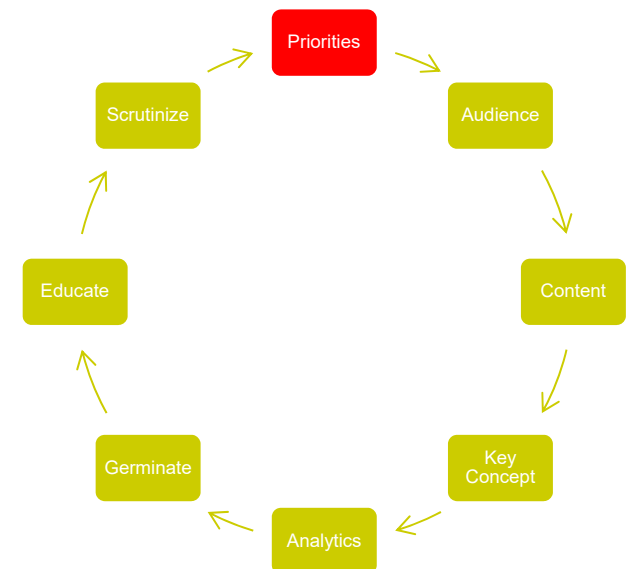


Ref. module 9 of Certificate in Channel Marketing

Priorities

How will we define and measure success?

- What is your budget? What is your required ROI?
- Conversion rates through the sales funnel?
- What benchmarks can you use?
 - Industry benchmarks? Tactic-based benchmarks? Do research.
- SMART Goals
 - Specific, Measurable, Agreed Upon, Realistic, Time-Based
- Aligned with Business Strategy?
 - How will this help achieve your Vision and Mission?



Priorities = SMART Goals



Objectives & Strategy

Overall Objective:

Goal 1:

Strategies:

Metrics:

Goal 2:

Strategies:

Metrics:

Goal 3:

Strategies:

Metrics:

KPIs

Goal		Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
Website Visits		1000	1100	900	500						
New Twitter Followers		20	40	50	60						
New Email Subscribers		50	50	60	10						
New Customers		4	5	7	2						
New Sales	£	1,000	2,000	1,500	2,500						

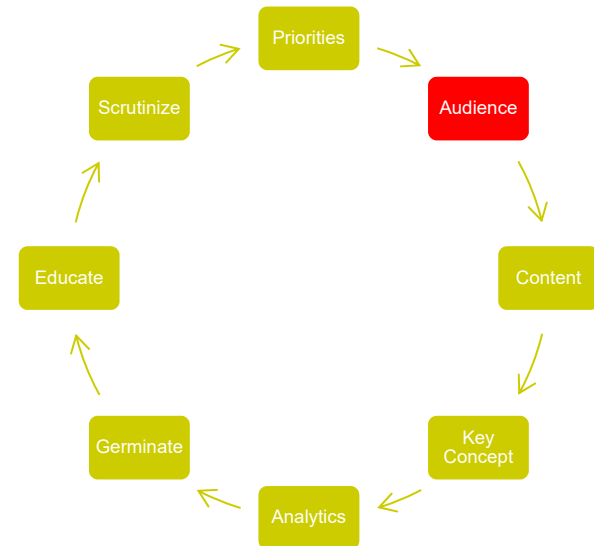
Joint Marketing Calendar

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
Regional Marketing													
Local Marketing													
Public Relations													
Website													
Content Marketing													
Sponsored Content													
Linking Page													
White Papers / eBooks													
Social Media													
Twitter													
Facebook													
Pinterest													
Instagram													
LinkedIn													
Online													
Blog													
Microsite													
Mobile App													
Mobile Media													
Email Newsletter													
Web													
Development													
Pay-Per-Click Marketing													
SEO													
Market Research													
Surveys													
Import Studies													
Search Campaigns													
Campaign A													
Campaign B													
Campaign C													

Audience

What is your target market?

- Which market segment will you target with this campaign?
 - How will you define it?
Firmographics / Demographics, etc
- Does this market segment meet the essential requirements?
 - Measurable, Substantial, Accessible, Differentiable, Actionable.
- What Buyer Personas can you build for this campaign?
 - Match content, messaging and value proposition for each.



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

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

Target Markets & Customers

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

Buyer Personas

- ✓ Some elements to include:
 - ✓ Demographics
 - ✓ Age, gender, occupation, ethnicity, marital status, income bracket.
 - ✓ Behavior patterns
 - ✓ Habits, lifestyle, personality type, buzzwords
 - ✓ Motivations
 - ✓ Likes, dislikes
 - ✓ What must you do to earn their loyalty / business?
 - ✓ Goals.
 - ✓ What keeps them up at night?



Ref. module 3 of
Certificate in Digital
Co-Marketing :
"Buyer Personas".

Buyers Journey

Match your content to the Buyer's Journey.

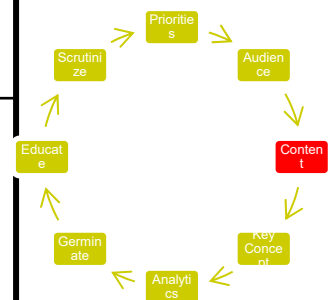


Ref. module 8 of
Certificate in
Channel Marketing:
"Buyer Personas".





Ref. module
9 of
Certificate in
Digital Co-
Marketing



Sample Content Plan

Objective	Grow Revenue by \$200K	Industry	Retail	
Target Audience & Customer Need Key Message	CMO, Marketing Directors Using customer data to determine/understand what customers want. Specific Customer Need: Predict which customers are at risk of leaving and retain them	IBM Software Capability: Market Growth Category	Analytics (Customer Analytics)	
	Start conversation	Make case	Meet Experts	Sales Handoff
Buyer Journey	Learn	Solve	Compare	Purchase
Information need	Problems the industry is focused on. Thought leadership	Looking for Solution that address specific Pain point	Start to compare features & functions	Serious about moving forward & talk to an expert
What format	Social media Conversation about problem areas, Success stories, Case Studies	White Papers, Cases Studies	Guided tours of products, Online demos. Opportunities to meet with the experts	Client References
How Interaction	Online communities, Blogs, web site, Telemarketing to target industry, audience list . <i>Spending Categories:</i> Advertising. Direct Marketing (purchase list) Social Media to generate demand. Digital Marketing, TeleMarketing	Presented by a Speaker at Webinars, Educational videos, on Web Site or Face to Face events. <i>Spending Categories:</i> Digital Marketing, Customer Conference or Marketing Seminar, Trade Shows (IBM Led, Third Party Trade Shows)	Series of small focused face to face Marketing Seminars designed around topics, Customer Conferences with Subject Matter Experts. <i>Spending Category:</i> Digital Marketing, Customer Conference or Marketing Seminar, Trade Shows (IBM Led, Third Party Trade Shows)	Focused marketing seminar meet the expert with Sales team in attendance. <i>Spending Category:</i> Customer Conference or Marketing Seminar

Key Concept

What is this campaign about?



Which products / solutions?



What is the Value Proposition for this campaign?

- And what makes it compelling?

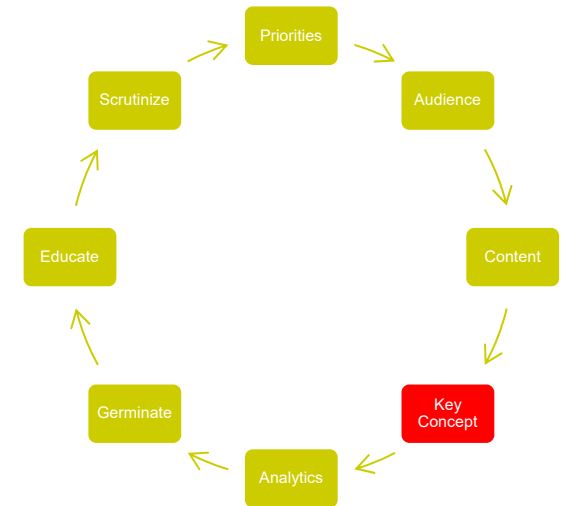


Which part of the Buyers Journey are you targeting?

- Determines the content type that you will use.



What is your key message?



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].

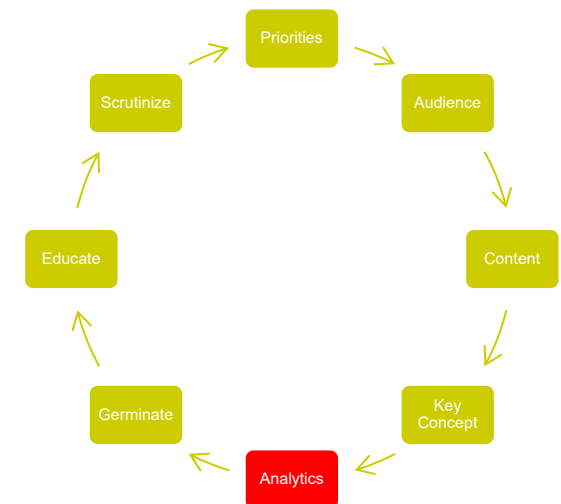


Ref. module 6 of
Certificate in
Channel
Marketing: “*Value
Proposition*”

Analytics

Key to continuous improvement and optimisation.

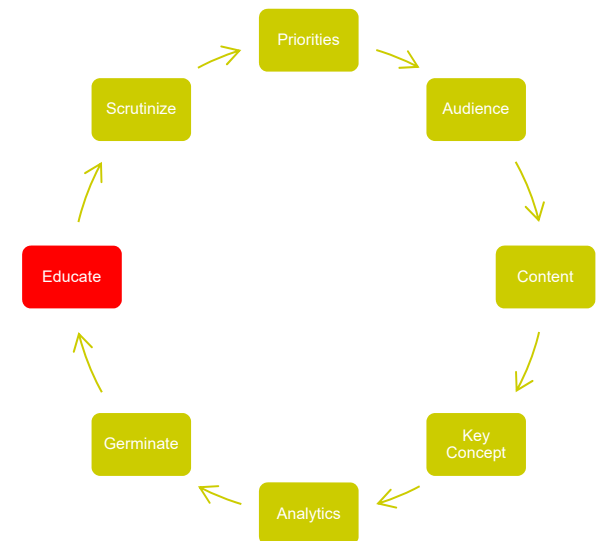
- ✓ What analytics tool are we using? Is it in place already?
- ✓ What KPI's will we use to measure "Priorities"?
- ✓ Must have tracking and analytics code on your site before campaign launch.
- ✓ Have "Goals" and "Events" setup before launch.
- ✓ Avoid "Vanity Metrics".
 - ✓ Is "Number of likes" really critical to your goals?



Ref. module 5 of
Certificate in Digital
Co-Marketing :
"Analytics".

Lead Progression

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



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

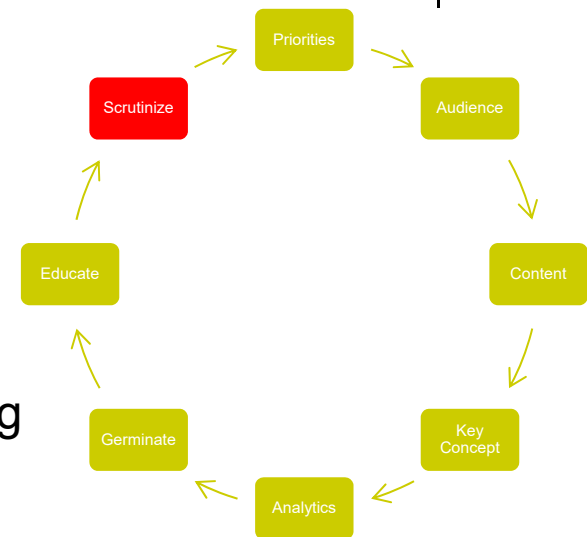


Ref. module 7 of
Certificate in
Digital Co-
Marketing: “Lead
Progression”

Scrutinize

Analyze, Optimize, Repeat!

- ✓ How will we know if “Priorities” are being achieved?
 - ✓ Tracking Conversions? ROI?
- ✓ Are conversion rates through the funnel meeting expectations?
 - ✓ How are conversions performing against benchmarks?
- ✓ Experiment, track results, adjust
 - ✓ A/B test everything
 - ✓ Copy / Design / Images / Forms



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.



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