

Channel Manager's Playbook

Tools and best practices for managing channel partners

By Peter Radizeski



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TABLE OF CONTENT

6. CHAPTER 1
The Beginnings
8. CHAPTER 2
How Good is Your On-boarding?
9. CHAPTER 3
“They Aren’t Selling My Stuff”
10. CHAPTER 4
Recruitment
12. CHAPTER 5
Alignment
14. CHAPTER 6
B for Branding
16. CHAPTER 7
The Roles of the Channel Manager
17. CHAPTER 8
Motivation
20. EPILOGUE: SOCIAL MEDIA

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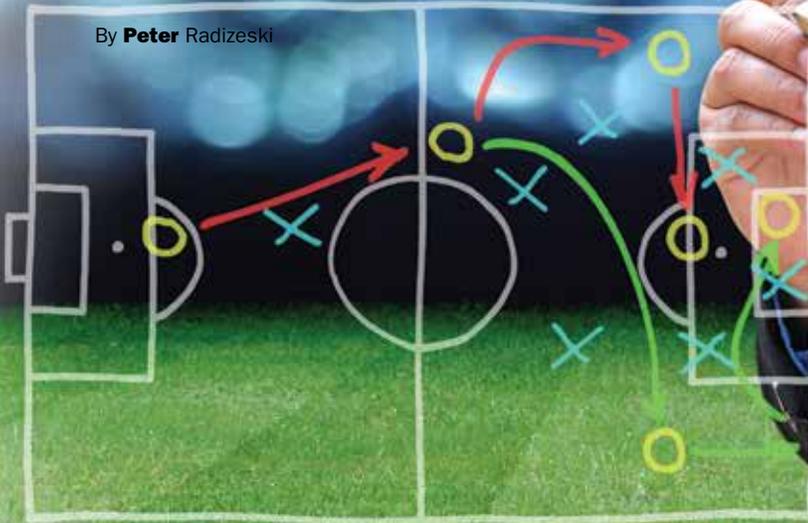
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THE CHANNEL MANAGER'S Playbook

By Peter Radizeski



Editor's Note: The following chapters originally appeared in ChannelVision magazine as a series of columns by noted blogger and channel veteran Peter Radizeski.

CHAPTER 1: The Beginnings

The biggest challenge for any business is revenue. For most that means sales (for some it means investment). In the last few years, it has gotten harder to cold call or door knock. One survey says 92 percent of buyers ignore unsolicited contacts, which results in longer and longer sales cycles (and discouraged sales reps). Buyers are more educated today and pricing is transparent (thanks to the Internet), with many buyers making up their minds before they even contact a vendor. Yikes.

In the last three years, numerous service providers have entered the indirect sales channel, hoping to leverage channel partners and their relationships. There are some erroneous assumptions here.

One of the assumptions is that the channel is a free (or at least inexpensive) alternative to a direct sales force. It isn't free to sell via channel partners. It is more difficult to sell indirect, especially for companies that weren't very successful selling directly.

A service provider needs the same support for indirect that it would provide direct; support that includes: product management, marketing, sales tools, sales engineering and sales management. Oft times, these components are missing.

One of the best practices is to keep the direct sales team separate from the indirect. I have seen different

versions of co-sales, and it usually ends up grim (especially when you are paying two sales teams for each sale). Even a referral model whereby the direct team takes leads from the partner can go awry due to conflicting priorities.

A channel program should have its own marketing person, since marketing to partners is dissimilar to marketing to customers. Other support personnel can be shared, including sales engineers. Quoting, pricing and promotions should be the same for both sales teams; otherwise customer confusion and channel conflict will erupt.

The channel can take up to three years to pay off on the investment. (And there will be a line item on your balance sheet for commissions that may be evergreen, which your CFO will hardly like or understand!) Does the vendor have a long term view and the persistence to see it through? I have seen programs come and go – even at very large companies.

One of the hardest aspects of indirect is the lack of control. Cisco, Xerox, IBM and Microsoft have a semblance of control over their “Gold” partners, but that can be attributed to the certification and training investment, gold level support that comes with a quota and – just as important – the co-marketing dollars. Many partners of the Big 4 have a business reliant on

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their primary vendor. For example, IBM partners are primarily focused on an IBM line of business and not much else. Telecom and cloud partners do not typically have any of these tendrils: certification, gold status, quota, training, co-marketing dollars.

The Big 4 also tend to invest in their partners with co-marketing, training, portals, knowledge base, events, support and free product. The free product means that the partner is “eating the dog food,” and therefore has hands-on knowledge of the product. That isn’t typical even in the hosted VoIP sector.

The telecom/cloud partners characteristically are not product experts. Rarely is their business aligned with a single vendor such that a single provider’s service is a major component of a partner’s portfolio. Managed service providers (MSPs) are the exception, since managed print services and remote management (RMM) tools tend to end up as the bundled offering. This results in a multiplier effect for the vendor as his product gets disseminated to customers through the MSP – without advertising to the customer (end user).

One aspect to take away from hardware vendors is the simplicity. The more friction added to the sales process (lead registration, quoting, paperwork, commissions), the less likely success. If the process is more arduous than the payoff, partners will do other stuff. Most people take the path of least resistance.

Another facet that hardware and software vendors demonstrate is that partners usually know where their products fit. Take Cisco routers, for example. Each router has a specific purpose and functionality. Cloud communications is not like that. Every vendor has one size to fit all, which is a ridiculous position for a vendor to take (because it leaves no one happy – not the vendor, nor the customer, nor the partner). Furthermore, lacking a specific target or value proposition from the vendor, the partner will furnish it himself. The partner will determine where the vendor fits.

It works similarly in branding. Salespeople, who often aren’t trained on the brand message, tend to make up their own messaging. Suddenly, there are as many messages bouncing around the marketplace as the vendor has salespeople. That mixed messaging doesn’t help with branding.

When vendors or service providers want rapid entry into new markets, the indirect channel looks like a good option. It can be, but only if the alignment, on-boarding, offering and recruitment are planned out.

During the next several months we will be touching on these aspects of channel management: alignment, on-boarding, branding and recruitment. The branding aspect will encompass the service offerings, the brand, the value proposition, the differentiator, competitive analysis, co-marketing and sales tools.

CHAPTER 2: How Good is Your On-boarding?

There are two theories of channel management. One is that the more partners the better. It represents more feet on the street, more leads, etc. The other is that a select group of partners can deliver quality sales.

The more-the-merrier mentality only requires a mirror for recruiting. If the agent can fog the mirror, he is good to join. This begs the question: Does signing a partner agreement make you a partner?

Pareto’s Principle comes up time and again when talking with channel heads. Often, it isn’t 80/20, but 90/10 – 10 percent of your partners are bringing in 90 percent of the sales for the channel program. Now if you have 450 partners, just 45 are producing. Why have the other 400?

There is an expense to carrying those extra 400 non-producing (or low-producing) partners – channel managers’ time being the largest expense. These partners still ask for quotes, still ask questions, yet don’t close anything. Time is the finite resource of any channel manager.

Who is your channel manager spending time with? Think about how much time a teacher spends with an unruly child. How often does a teacher spend time on an ‘A’ student? Your channel managers will have to grade

partners to prioritize tasks for the producing agents. This may create an environment where a ‘C’ agent can’t get the attention necessary to move up to a ‘B’ or an ‘A’.

Just signing a partner agreement doesn’t make anyone a partner. It isn’t even a good indicator of anything. On-boarding is the piece that gets the partner interested – and engaged. Not many vendors have a written on-boarding process. Not many do any on-boarding at all. (A webinar is not on-boarding.)

On-boarding should be a two-way process whereby both parties get familiar with each other. The more the vendor knows about the partner’s business, the better the vendor can help that partner. More interest in the partner’s business will likely mean more interest from the partner in the vendor’s business.

During the on-boarding, instead of Power Point-ing the partner to death, discuss where the partner has holes in his portfolio or where the partner sees a fit for the vendor in his offerings. This gives a view into the potential business. This also gives the vendor more insight into the partner (and his motivation for signing up), while providing the vendor with opportunity for sell-through.

On-boarding is a time when the partner can discover the culture of the vendor. The culture can have an impact on employee turnover, support, stability, quality and commitment to channel. Just look at the culture of Rackspace, Netflix and Zappos.

The value proposition is an integral factor to success. Know your value to your partner – and to his customers. How can you help him fill out his portfolio or his bundle to his customers?

As in any selling, you have to understand how you differentiate your offerings from the competition. In the hosted PBX space that means why your service instead of a premises PBX, Microsoft Lync, Cisco UCS or other hosted provider (Asterisk, Metaswitch, Broadsoft and proprietary). If you can't explain the difference – and where your service fits in the ecosystem or marketplace – how will your partner ever be able to position your service in a sale?

What is unique about what you are bringing to the partner? It could be that you have a channel-only sales strategy or you pay outrageous points on evergreen. Whatever it is needs to be told clearly and concisely.

Another helpful factor is a “channel champion.” In telecom that role usually falls to the channel head, but in smaller organizations (or less formal environments), it needs to be someone who will fight for the partners. There will be commission battles, channel conflict, sales segmentation, deal registration and other internal conflicts that will cause partner fury or unease, especially if a deal is

taken away. (There isn't a partner in the telecom channel with five years' experience who has not experienced this at least once.) It results in sales reluctance from your partner. If word spreads (which it does), it can mean slow sales from the channel. Someone has to represent the channel internally for confidence from the channel.

During on-boarding, partners should become familiar with not just the products and positioning, but also the process (the 3 P's). By that I mean, deal registration, quoting procedure, portal demo, and all the other pieces of the sales process from prospecting to first bill review.

Do you have implementation specialists or project managers? How many steps in the install process? How are the partner and/or the customer kept informed? What does this process look like for the customer? What can the customer expect? What can the partner expect? What is the partner's role in this process?

Finally, how can you work together with the partner to get two deals done in the next 90 days? How can you work together to be successful? Put a plan in place for the partner to take all of the on-boarding to market as quickly as possible. Without a 90-day plan, it is likely that no sale will be made for 90 days, and when an opportunity arises, the partner will have forgotten most (if not all) of what he was taught during on-boarding. This means the channel manager will do all of the heavy lifting.

Two questions that rarely get asked: How do you want to be managed? How do you imagine us working together?

CHAPTER 3: “They Aren't Selling My Stuff”

Much of the demand that drives quotes from the channel originates from the customers. And in a Pavlovian response, partners jump to get a quote. All too often, however, this is done without doing much discovery at all. “The customer is hot! Let's get the quote quick and win this one!” This often turns into hurry up and wait.

If the customer says, “I want broadband,” how often is the question that follows, “Why? What are you using the Internet for?” Or “How vital is the Internet to your business?”

One reason that this question: “How much would a thirty minute outage cost?” isn't asked often enough is because the answer may be, “We've never had an outage.” And then the dialog is stifled. Or is it?

“My job is to sell you productivity and efficiency. The whole purpose of moving to the cloud for a business is to make that business more flexible, efficient, productive and competitive. We do this by getting you back time in seconds or minutes. On a congested pipe, all that waiting for pages causes delay and frustration.” (The same can be said for malware, viruses and older computers.)

“Let's take a look at what you are using the Internet for, so that we can get you the right pipe. Fair enough?”

One responsibility of channel managers is to educate your partners. The education is often about products; it is rarely about how to sell it, what questions are working. When was the last time a channel manager provided a script to a new partner?

When the partner gets better at selling, he will sell more stuff – some of it will be yours, some of it won't.

Another component of education is on the Solution Sale. The customer asked for an Internet quote, did you ask what he was doing with it? We have options beyond managed router for the customer. We have hosted email, backup, collaboration, conferencing, etc. Telling your partner these options may help him keep them in mind for when the customer doesn't want a quote (for he is stuck in a contract). He can ask what they do for hosted email or backup – or even what conferencing bridge they use.

If anyone likes fishing, you use different lures for different fish on different days. The service portfolio is a tackle box

filled with lures that the partner can use to go fishing for prospects. Many businesses have a contract for three years for phone and Internet. Getting in the door with something such as email or conferencing gives you a billing relationship with that customer, and billing builds trust.

To be a true Telecom Solution Seller, the partner has to want to be more than the pipe salesperson. He may not be comfortable asking about any other services. He may be transactional. Replacement services of like for like (broadband or T1 for 10MB, SIP trunk for PRI) are easy to sell transactionally. But most businesses are using hosted email, conferencing, backup (hello, Dropbox!), especially today with smartphones and their personal clouds with Apple, Amazon and Google. It can still be a replacement sale.

It is about customer wallet share. Getting deeper into the customer (for the partner) means that the churn goes down, ARPU goes up and the commission checks get bigger. Another factor: no other partner will come along and replace your services with their own, cutting you out.

Network is the easy piece. Voice and cloud services are usually a little complicated because there are moving parts (such as phone numbers, data to move, and new processes to train employees on). Yet once you get them on your service, they are sticky.

The key to sales is to be helpful. In what ways can you enhance your relationship with your partners? One way is to let them know who is buying what. When a sale is made, let partners know. “This bank bought this and that”. Now the partner has a concrete idea that banks buy this and that. Service providers can do this by email, but they can also utilize their LinkedIn group or Twitter account. It doesn’t have to be email all the time.

The other big issue is: How do I get their attention? Partners are drowning in email and webinar invites. Maybe email isn’t the best way to reach them. Have you asked them what method of communications they would prefer?

If the partner is ignoring emails, there are other avenues. Social networks such as Google + , LinkedIn and Twitter allow for a different way to reach out to a partner. It doesn’t have to be a “Hey you!”

In my experience, congratulations are a great way to touch a person. Whether it is a birthday, promotion, anniversary – or, even better, their name mentioned in

the press – dropping a quick “Congrats!” on social networks is a way to get noticed while acknowledging the moment for the partner.

“Being helpful” was Zig Ziglar’s definition of sales. Jeffrey Gitomer used to say, “Always give value first.” What most people care about is themselves. WIIFM is the watch word of the day: What’s In It For Me.

Treat the partner to a marketing campaign to peak his interest. Tweet about the new SPIFFs without details – have them reach out to you. Use it as a hook. “One partner just got a check for \$2,000. Contact me to find out how you can get one.”

Send a Vine or a video email that is two minutes or less but is personal. “Hey, your last quote request was for a bank. Just sold a couple of bank deals. Think we can leverage that for your deal? Call me.” It was quick, personal (or relevant), concrete, clear with a call to action.

Often I am added to email lists. This morning I received a “newsletter” with the subject line about a disaster area. The body was a mess of info about energy and mesh and renewable. No idea who sent it or why I got it. That is the case often. Don’t be that person.

The subject line needs to catch their attention. (So does the sender name.) There needs to be a call to action. An irresistible offer – SPIFF, promotions – also helps. Through all this keep in mind: am I being helpful? Is this valuable? Would I send it to a friend?

As far as being helpful, think about new partners. How can you work with a new partner to get them a win in their first 60 or 90 days?

One reason Freemium is a popular model today is that the risk for a user is really low. Extrapolate that to our business. Free-trial offers or no-risk guarantees are noteworthy. If a partner is new, a smaller deal is less risky.

It isn’t always about the price, sometimes it is about the risk (which is about trust). Build trust in little ways like testimonials and reference accounts. Written procedures for deployment and introductions to the implementation team or project manager also can help build trust with a partner.

Recruiting and on-boarding are just the beginning in a partner relationship. Helping the new partner with her first win is just as important.

CHAPTER 4: Recruitment

It all starts with recruitment. Pick the wrong partners and you will be wasting time. You can’t even assume Pareto’s Rule of 80/20; it’s often 95/5. Only about 5 percent of your partners will produce consistent sales. And you want more like them, correct?

In each channel program, there is always the “quantity

versus quality” debate. More often than not, there is pressure to add more partners. More is better. More means more sales. That’s the thewory anyway.

“If the partner is selling our competitor, why couldn’t he sell our stuff?” There actually could be a bunch of reasons. Ask Cisco partners to sell Juniper or Xerox partners

to add Ricoh to their lines. Why aren't Ford dealers selling new Chevrolets?

But let's back up a little. Whenever I start a project in channel sales, the first thing I do is determine the value proposition of the service provider. What differentiates this service provider from the competition? I ask that internally and externally – from partners, customers and employees. It is a valuable exercise. It is the foundation for the program: Why this service provider?

The why or the value prop is significant. It works out that organizations with a strong culture have the why baked in. Simon Sinek and Jim Collins have written about this extensively. The CEO of Zappos, Tony Hsieh, built a billion dollar business around his customer service culture. So the value prop, culture or the why is an important ingredient.

Next, I examine the existing partners. I create a partner profile of the best producers. Or, at the least, I create a set of criteria for potential partners. With the criteria, I have a checklist to use to determine who to look for – and who to decline.

While upper management may agree with a criteria (as a good idea), in actual practice, upper management will want to see signed partner agreements (plural, many). When asked why so few agreements were signed, the response that most did not fit the criteria is often met with sour looks.

Upper management wants to believe that everyone should sell their stuff, that everyone should want to and be able to. This is the crux of the problem. Most service providers are not Cisco or Microsoft with a service offering that is a good fit for everyone. Most companies deliver a service that has a good fit in a specific company and size (despite the crazed concept of being all things to all people).

Recently on a panel about “Why unified communication deployments go bad,” all the panelists agreed that a majority of the issues with UC deployments were that the customer was sold the wrong service. The panelists also admitted that they would never say “No” to a sale, any sale. Why? They just want to book revenue – even bad revenue. They really don't care if the customer is a good fit (or if the customer is happy) as long as the customer is paying the bill. It is why many customers bounce at the end of contracts.

Then there is the flip side of the coin. The channel executives will wonder why the partners aren't selling. What they should be asking is: Why did we sign them up in the first place? Well, because you have a quota for new agreements – not new partners, new signed partner agreements.

Signing a partner agreement does not make anyone a partner. It is just one piece of the puzzle. It is a case of measuring the wrong metric.

In the VAR world of hardware and software, while anyone can sign an agreement, committed quota determines your discount and your support level.

If upper management decides that they need as many partners as can ink an agreement, well, you just have to go along. But be warned – programs that involve fogging a mirror as the chief requirement tend to falter. It is expensive to hire enough partner managers, sales engineers and support staff to manage 500 partners. And channel managers only can interact with a finite number of partners per month. They can only provide a finite number of quotes each day. There is a point when having too many partners generating activity or needing attention will impact results.

One partner can generate a lot of work – quotes, questions, conference calls – but never generate a sale for a variety of reasons, not the least of which is that he doesn't trust you or he likes another service provider better. And let's not forget the golden oldie: he just needed three quotes.

The key to recruitment is a Red Velvet Rope Policy. It is a concept from Michael Port – and any trendy nightclub. A velvet rope only lets in the “cool” people, the people on the list. Not everyone can get in. It creates demand and peaks interest. Outback Steakhouse used to artificially create a line in order to spark demand. The RBOCs used to do this with exclusivity clauses, tests and hurdles to joining their program. Today, most programs just look for the ability to sign the agreement. If you can keep the pen in your hand long enough to sign, you are in. But does signing a partner agreement itself constitute a partnership?

The master agency model is kind of a red velvet rope policy. Over the years, a few carriers shifted to a master agency model, whereby only masters were partners; everyone else would have to go through a master. It formed a kind of velvet rope. Exclusivity is the velvet rope. If anyone can get in, it is about as special as McDonalds.

One way that channel managers see interest from a prospective partner is when there is a suspected hot deal. The potential partner wants to sign up in case this hot deal closes. I suggest you start asking some pertinent questions.

“Is this a one-time deal or do you see us working together with many of your customers?”

“How do you see us working together? How do you see our services fitting into your portfolio?”

In 15 years, only one channel manager has ever asked me these questions! Ask it and you will stand out, too.

Learn to say “No.” It is liberating. It can morph into the take-away close – or it frees up your time to work with partners that will produce results. At the end of the month, we all have quotas to hit. In sales today, time management is one of the keys of selling. So any time that you can save and not waste will be a plus. In other words, learn to value your time like money.

The success of any program starts with recruitment. On-boarding is key, but without the proper partners to onboard, the program's success will be limited.

CHAPTER 5: Alignment

Another important element to examine during recruitment is alignment. Does your product set align with the current portfolio that the partner is currently selling? One issue with cloud sales still being less than 25 percent of the channel sales is that cloud may be adjacent to what agents sell most – network services – but it may not be aligned with their business model or portfolio.

Adjacency is important. It means that what you want the partner to sell – say, cloud firewall – is adjacent to what he primarily markets and sells – such as MPLS networks or IP-VPN.

If you are selling hosted PBX with a target market of 50 to 500 employees, then a T1 slinger agent is not going to be a good fit for you. Why? The T1 is not aligned or adjacent to a 50-employee business today. It is more likely that you will be getting quote requests for fewer than 50 employees. You screwed up here. This partner is not aligned with your target.

A company with 75 employees that has a hybrid cloud strategy – meaning public SaaS and private cloud (data center) – will likely be using more than 10MB of Internet bandwidth. They will use about 7MB up just on hosted PBX. Performing a little cocktail napkin math where cloud services run about 100kbps per employee, this company would need an upgrade or a dedicated VoIP circuit (can you spell redundancy and disaster recovery?). Does this partner ever talk about BC/DR?

How does a partner align with your services? This is an important part of recruitment or at least on-boarding. Most service providers have a large catalog of service offerings. Match those services up with the proper partner.

If your partner is a VAR or MSP, what holes are there in her solution? Does she offer managed router and firewall, but could sell IDS (intrusion detection) and DDOS services to bigger customers? Does she have clients who need and would buy these services from her?

If your partner is a telecom agent, is he interested in selling more than network? Does he have a design on selling a solution that is a mix of network and cloud? Or is he at a point where he is head down just scrambling to keep his head afloat?

The migration to selling cloud services takes not just a mental shift but a business plan shift, as well. It will mean asking different questions, performing real discovery and ultimately being uncomfortable. The partner will be uncomfortable with asking new questions that may lead to an area where they lack knowledge. I don't know why so many partners fear saying, "That's a good question. I don't know the answer, but I will get it for you and get back to you by Tuesday morning." They are missing a

chance to (A) be authentic; (B) build trust; and (C) prove your word by getting the answer by Tuesday.

During the on-boarding, after the alignment process where the services are matched up with the partner portfolio, there should be a product dump. The product dump should include what the product is, who buys it, why do they buy it, and what outcome does it deliver. There should be a couple of questions that the partner can ask that will identify opportunities.

This doesn't have to be an 86-slide presentation either. It could be a 10-slide deck that covers this information and gives the partner enough to settle down from the anxiety of not knowing, of being uncomfortable.

If the partner is already selling to the target market – let's say 50 to 99 employees – he already has a customer profile. He already has a comfort level selling into this segment. He should be able to knit together the information provided in those 10 slides with his current *prezo* or *spiel*. And with that uncover opportunities, which is the best beginning.

Every service provider has channel managers more than willing to help close deals. The partner should learn to feel at ease with uncovering the opportunity then setting the follow-up appointment to bring in the expert to close the deal. This is becoming more common, especially with cloud services and security.

Speaking of security and alignment, the service provider offering cloud firewall or DDOS mitigation might want to find partners with security certifications. If a service provider really wanted to tie itself to the partner, the service provider would assist the partner in getting a security certification from ISACA (CRISC for risk management or CISM) or from CompTIA.

Think about how much of the certification programs of Microsoft and Cisco were really marketing programs. The cable companies are allied with the Technology Channel Association (tcasite.org) to offer a required certification for partners. RapidScale, Alteva, Level3 and other service providers offer a program of courses for partners. It allows the partner to gain valuable knowledge that is associated with the service provider. It only works if the course isn't just a pitch but some real knowledge that can be a foundation for the partner to educate the marketplace. The market for non-network services requires a bunch of education. The smart partner will be doing that heavy lifting.

Alignment of the service provider service offerings with the appropriate partner is an important element of the recruitment and on-boarding process. Success (sales) will come if the partner is aligned with the service provider's target market and product set.

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CHAPTER 6: B for Branding

A different element of alignment would be to bring on partners that not only sell to your target market but also will view the service provider as the expert in that service delivery. Smoothstone (West IP) did an excellent job of this early on by identifying the market they were targeting, why they were a good choice, and putting on a great dog-and-pony show for the partner and prospect. That is proving your expertise, and that is a huge step in branding.

Think about this: the average large master agency has agreements with no less than 20 vendors offering hosted PBX. What kind of alignment is that?

Certainly there could be segmentation of the market: over-the-top (OTT) VoIP for very small business, small business, 75 employees to 250, and more than 250 employees. That isn't how it is ever presented (marketed) because all service providers want to sell to anyone for any revenue.

Even when a partner asks the provider about the sweet spot, the answer is often ridiculous. For example, Cbeeyond's official target market was 50 to 500. That is a very large spread. How exactly were they hitting 400 employee sites with T1s?

Unified communications vendors aren't much better with the target of up to 250. At least saying more than 75 (such as Smoothstone/West IP) or more than 150 makes sense.

The Small Business Administration defines small businesses as no more than 500 employees. The VSB (very small business) of 1 to 5 employees differs greatly from a company with even 50 employees. Needs, wants, budget, buyer are all different.

A company profile for fewer than 75 employees usually consists of a business owner and one or two IT people. Companies with more than 100 employees will look differently. This is why I laugh at the "target market" of most service providers. You might as well say, "Everyone," which today in marketing results in "No one."

Recently, my hosting company called about my "brand visibility." The caller asked if I wanted people to find my business. I said "No." She said, "Don't you want more sales?" My reply, "Yes, but I won't get them by worrying about being on the 30 sites you promise to list me on."

I had to explain that I know who my target market is. I know where they hang out. I have a plan to be in front of

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them and provide them value first. (You are currently reading such a piece of my marketing.)

If a service provider wants to be top of mind with a partner, the more concrete the service provider is about whom they provide outcomes for and how, the more likely the partner will be to think of the service provider during the sales process.

The opposite is also true. If the target is vague, the service provider won't be top of mind. It will be one of six bids. Good luck with that.

There are a number of ways to differentiate the service provider. One way is with the service offering – what it contains, who it is for, what they can do with it. When there are 300 companies powering their hosted PBX offerings with BroadSoft, the differentiation will not be in features. It will be in service delivery, project management, implementation, deployment and professional services.

Much of that ties together since the project – the delivery of sold services – needs to be managed alongside the customer expectations. In voice, there are a number of moving parts – extensions, DIDs, toll-free numbers, conferencing, voicemail, porting, inter-operability (of trunks with the customer hardware), handsets, software, integration, fax, training and features. Someone needs to have a handle on the delivery, implementation, deployment, training, timeline and porting. And how this is handled needs to be explained to both partners and customers. It can be the difference maker.

What I find ironic is that many service providers love their tech and think it is the only thing that they need to gain customers. Yet these same service providers don't have a good view of the market. For example, Frontier has added SMS to landlines to prolong their revenue from copper. Not many hosted PBX providers have added SMS features to their VoIP offering, which is actually easier.

The hosted PBX providers kind of jumped past unified messaging – the one inbox – and went after the unified communications label – and failed actually. It was a garbage can term that customers were not looking for. It had a number of components – video, voice, email, text/chat, etc. It was clunky. Messaging has to be concise and clear.

This is why education is such a big part of selling. The partner needs training, but the prospect needs education on the features, benefits, outcomes. Case studies are becoming a marketing thing due to this need, but it will quickly become just noise. Marketers ruin everything.

Last year, a prospect called me about migrating from hosted PBX back to a premises PBX system. The requirements included integration with Sage and Outlook. I didn't know that one of my service providers actually integrated with both software apps. There was nothing on the Web site or in the marketing. Missed opportunity.

That was the not only time that has occurred.



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- Ken Mercer, Vice President of TBI.

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One peeve of mine with Level 3 is that while it has a nice portfolio that includes things such as DDoS mitigation and content delivery networks, the company does a poor job of explaining to the channel who makes a good prospect and why. This is basic marketing. It isn't like everyone needs a content delivery system.

If you see the average day in the life of an agent, it is customer-needs driven. The prospect calls to get a quote for something. Like a rat to cheese, the agent goes running. The discovery is minimal because the agent doesn't want to bother the prospect with questions – even though by asking questions the agent could be branding himself.

If a prospect gets asked a question that he has not been asked before or that makes him think, the salesperson that asks that question moves away from being the average sales guy.

It is called discovery because it is about discovering needs, wants, pain points and enough information that the solution offered will be a no-brainer. Sure, you can say that 10MB of Internet access is the same. But is it?

Broadband isn't the same as dedicated Internet access. Besides the service level agreement, there is a big difference between best effort (“up to”) speeds and dedicated throughput.

What if the prospect had an office or large presence in London? Wouldn't that mean that the better option for an Internet pipe would be from a provider with a short route to London?

I have a client making its 2016 three-year plan. It includes moving to SaaS and hybrid cloud (Rackspace and colocation). The circuits we will install will have to come from providers with a direct connect to Rackspace. It isn't always about cheap, fast pipes. The service providers have to do a better job of explaining the bigger benefits, especially in the current climate where cloud is becoming prevalent.

Back to the agent on his average day: if it is customer driven, the service provider will not ever be top of mind unless they tell stories about how they get layered on, how they are different (connect to AWS), and what outcomes their customers have experienced. That is what the buyer is looking for today: outcomes.

Certainly, 30 to 40 percent of the market is still looking for cost savings. However, the other 60 to 70 percent are smarter buyers looking to make strides in their business to be more efficient, flexible and competitive. Cloud services certainly are platforms for that, but so are partners that ask good questions and uncover tidbits that the customer didn't think to mention, but allow for a solution that will deliver a good outcome.

CHAPTER 7: The Roles of the Channel Manager

The channel manager (CM) has a number of different roles to play in order to be successful today: Den Mother, Brand Ambassador, Closer, Librarian, Teacher and Conduit.

The channel manager is the conduit for the channel partner to the service provider. All questions, concerns, complaints and education come through the CM. The CM has to have relationships internally with a number of departments to get stuff done. That stuff can include a sales engineer on a customer call (now!), someone in billing to handle an issue, or a way to escalate trouble tickets. Building these relationships internally is vital, but it is becoming much harder to achieve due to the remote workforce of many CMs, consolidation and employee churn, as well as downsizing.

The CM is also the conduit to the commissions, SPIFFs and promotions, but that is basic, right? At the very least, the CM provides quotes and promo info.

The CM occasionally acts like a Den Mother, sometimes rounding up partners for training, events, dinners, even chasing after quotes and sales: “What happened to that quote?”. One step further is to ensure that partners get certified or at least educated on new product lines, such as the Cub Scout Den Mother of yesteryear who

planned activities at meetings in order to get the scouts badges and moving along the ladder.

Sometimes the CM has to be the Closer, closing the sale, especially on services that the partner is unfamiliar with such as security or disaster recovery. Both the CM and partner need the sales; and this is more common than I once thought.

Like a Librarian, the CM is there to provide information, resources, collateral, webinars, what-have-you, per partners' requests – or even better, before they ask. One key feature here is to not just provide a quote but provide options. Those options can include:

- a case study;
- a reference (“We just sold to a bank like this. Here is what they bought...”);
- additional services like managed router or cloud backup; and
- differentiation or positioning (“We are really good selling this to...”).

Unless you want to be a quote monkey, the emails have to contain more than the quote.

That is what being a Brand Ambassador is about. The CM is the cheerleader for their company. The CM tells stories about the services in order to demonstrate

to the partner the best fit or a use case or even that the competitive advantage. There is so much competition for network, hosted VoIP, even cloud services that the CM needs to explain the advantage, or it is a price war.

You see Brand Ambassadors in retail stores often providing samples of food and drink. Red Bull and Monster energy drinks send ambassadors to events to hand out cans and swag. Take that into your world – at a trade show (use the swag) or from the office (use the SPIFF or the contest).

And lastly, the CM is there to teach – about the company, the processes, the promotions, the products and how to sell. (This has been talked about throughout this series.) Partners won't propose what they don't know – and won't sell what they are not comfortable with. The partner is lending her reputation to the service provider during the sales process to her customer, who she would like to keep and have a long relationship with. Partners are risk adverse when it comes to that. As Benjamin Franklin said, "It takes many good deeds to build a good reputation, and only one bad one to lose it."

It seems like a lot to ask someone to do. Manage 20 to 120 partners; quote for them; answer questions; reply to emails and phone calls; cajole them into training, then into proposing; build rapport and relationships; and all of that on a commission plan with quota. Lots of stress. Lots of triage. So much juggling.

There is no pithy answer to this. It takes time and task management, following a schedule and, quite frankly, support staff.

We are in the age of being attached, online, connected 24/7. Down time is important for health and productivity. Never forget that. (So is sleep, water and exercise – walking or movement).

Yet in this age of the magic of smartphones, apps and clouds, we often do not leverage the technology available to us to be more efficient – Mailchimp, email templates, auto-responders, Master Stream, CRM,

APIs, Wunderlist, Trello, Todoist and so many more apps that integrate with email and CRM (and VoIP).

Channel managers don't have their own training or trade show (although the TCA, tcasite.org, does some CM training once a year.) There aren't a lot of places to discuss best practices, short cuts, technology advancements or the like.

In addition to all of that, there are two other responsibilities that the CM has: recruiting and marketing. We touched on recruiting in chapter 4. Marketing is a whole book by itself (and we touched on ways to use social media and email in other chapters including chapter 3). We will touch on "Effectively Using Social Media" in a later chapter of the coming e-book. For now, let's just say that email marketing is still very effective, especially to partners that you have a rapport or a relationship with. It is also highly effective if the email is valuable and not just press releases or "Sell Our Stuff" kinds of messages.

Email marketing keeps you top of mind. If it is valuable stuff, it will elevate you from just another CM to a great CM. The content can include any of the following:

- tips on getting leads;
- sharing success stories of other partners (since most salespeople are competitive);
- the top sales of the week;
- a hot vertical;
- first customer of a new product;
- how to get referrals; and
- how to upsell or cross-sell.

Being a conduit works both ways, right? Information flows out from the service provider through the CM to partners (and their prospects and customers). Then questions, concerns, quote requests flow back to the service provider from the partners through the CM. The CM contacts numerous internal departments to get in touch with the partners. Through this conduit activity, the CM has many duties including Den Mother, Brand Ambassador, Closer, Librarian, Teacher, Recruiter and Storyteller. Balancing all of that is indeed a big job.

CHAPTER 8: Motivation

How do you motivate partners? Well, if you chose them properly and on-board them correctly, you will be well on your way. If not, you'll have to get creative.

In chapter 3 of this series (see the May/June issue of ChannelVision), we talked about getting attention (and some marketing), but there are tactics that can be used to motivate partners to sell more than just network services.

One suggestion is to add services to the quote. For example, MIS or DIA (or whatever you call Internet access) is quoted with or without a managed router. How about with or without cloud backup?

Or what about hosted email? Back in the day, ISPs offered free email service to customers. Then AOL and EarthLink made millions of dollars from people who pay to maintain that email address. You just never know where the gold will be. With all the noise about Microsoft Lync and Office365, even agents have jumped into that pool to sell it to businesses for commissions. This means they are open to offering services customers will consume.

A CM has to be familiar with the company catalog of services. There is probably a gem hidden in there somewhere that could make you stickier to partners and their

customers. (And there is likely a product manager who will help you.) At the time of this writing (2015), a hot commodity is cable; yet mobile device management packages (MDM) are making strides. It allows partners new ways to start a conversation with customers and prospects.

Keep in mind, however, that none of this will happen overnight. It is incremental change, slow like a glacier melting.

GETTING LEVERAGE

It's also important to leverage the orders you see and the other partners you work with. If you see a pattern or a trend, pass it on. For example, if you start seeing quote requests for backup or DDOS mitigation, let your other partners know.

If the quote is for a bank or retail or healthcare, letting the partner know about specific offerings for that vertical would not be out of line. Or let the partner know that the service provider has X number of clients in that space and those types of companies typically buy "this and that."

EarthLink has made a big push into the retail vertical with two packages that are uniquely attractive to that vertical. The first one is a PCI Compliance bundle, which is crucial for credit card processing. The second bundle is for in-store customer Wi-Fi with analytics. The EarthLink CMO is able to clearly define where the sweet spot is for these services and how many logos have signed up for the service. This is exactly the kind of thing a partner can remember.

Another suggestion that might be controversial: if you have an agent who is successful knocking out network and voice sales and you have a VAR partner in the same area who is quoting but not closing, invite them both for coffee or introduce the two to each other.

Also don't forget to leverage your relationship with the partner. Most often that is why people do business with people – they know them and like them.

GETTING ATTENTION

A big question I often get is: How do I get potential partners to listen to my pitch? Well, let's not forget that they have a lot of noise to filter through, and their attention (time) is a valuable commodity. Even in a time of little industry turmoil or change, attention will be at a premium because the potential prospect will be busy running his business – head down crushing it.

Attention is a privilege. Seth Godin wrote a great book called "Permission Marketing" that defines the value of garnering attention. Most people and companies squander away that asset.

You have to treat this like a marketing campaign – and it is marketing.

In a marketing campaign, messaging is designed to catch the prospects. The components of email marketing are as follows: the sender's name, the headline of the email, the message copy and the call to action. It's also

about demonstrating relevance and the proper language (choosing words carefully).

We live in a world capable of marketing one-to-one. It doesn't have to be a mass blast today.

Enthusem.com allows you to upload an image, add a message and a personal URL to track activity. The service will mail the card in a translucent envelope for you. Each card can be different. It is matter of being creative. (The card is less than \$3 each.)

The message must be valuable to the prospect. It has to be about them, not you or your company. The message should be about how your company can help them.

Other ways to get attention: Stalk them online.

LinkedIn, Twitter, blogs, Instagram and whatever the new shiny app is are all places to learn about and engage your prospects. Start a blog or Tumblr or Twitter account that is all about your partners and what they are doing. This is a long-term strategy, but it will have a number of payouts, including personal branding.

The best sales professionals bring creativity to bear to design solutions as well as get the meeting. In the end, sales is about being helpful, said Zig Ziglar. Your relationship with partners is going to be due to a combination of your personality and your actions. Trust is built on actions more than words.

Upon re-reading Jeffrey Gitomer's points about "Consultative Selling," I could see a correlation between the two. "Consultative sales is about style + strategy + knowledge," writes Gitomer. "Consultative selling combines your personality, sales skills and inter-personal skills into a style that makes prospects most likely to buy."

As a CM, your prospect is a potential partner. You have to sell yourself, your company and your product portfolio to that prospect. That's sales. The marketing is the message of how your company and its products can provide a positive outcome to the partner's customers.

Trade shows are becoming like ESPN; everything is sponsored. The AT&T coffee break goes right along with the tw telecom fiber rich breakfast bar. These sponsorships are for branding – get the name in front of the market of prospects. Truly, it's all about giving value first. (Not that I'm equating coffee or a granola bar with value – or even a beer.) The value is in how you can help the partner's business grow.

This is a long term plan, too. I know everyone wants a shortcut. Video testimonial from a partner endorsing your company would be one shortcut. Another would be a luncheon where partners talk about their successes. Or go back to the smile and dial.

But in the end, and the long term, Recruitment, Alignment, Adjacency and On-Boarding are the secrets to channel manager success. Good luck out there!.



Peter Radizeski is president of RAD-INFO INC., a telecom strategy and marketing consulting agency.



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Epilogue: Using Social Media Effectively

The best way to stay top of mind with your channel partners is to offer concrete examples of your services. Social media can help with that.

Today, content marketing is the new SEO (search engine juice). And re-purposing of content is also becoming an automated process. For example, one long article can be parsed out as several Facebook posts, as paragraphs or quotes.

The most important thing to remember is that your Internet home base should be something you own, similar to a blog or company Web site. LinkedIn groups, Facebook pages, Twitter or similar are not properties that you own. Rules change on these social networks, often in order to increase revenue for the owners (and stakeholders) of the networks.

You should own your own “Hub,” your home base, your Internet HQ. [Side note: I break my own rule on this, as I blog on TMC’s site and on blogger. However, all of that content feeds to rad-info.net.]

I recommend blogging, but most people freak out about blogging – the commitment, the blog ideas, etc. It is a long-term commitment. There are no shortcuts to growing a loyal fan base. Sorry.

Now, a blog post doesn’t have to be 750 words. It can be 200 words if the thought or idea is complete. For example, if I was blogging about the latest hosted PBX sale, I could simply state:

“Our partner recently closed a 50 seat HPBX sale to a real estate office in Tampa. The main factor was the find-me-follow-me function for the agents as well as the unlimited voicemail boxes and extensions for agents, brokers and property descriptions. This replaces a premises system that was aged out.”

Short and sweet. I could go into more detail by adding, “The partner will help with the deployment on-site and training will come from the company on turn up and 90 days later. Polycom and Yealink phones will be deployed along with an Edgewater IAD and about 40



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cat5e home runs that the partner will install.”

Other facts you could add, “The partner will enjoy our Spring Fling SPIFF of \$500 for this sale as the spiff program runs from April 1, until June 30. That spiff is in addition to the regular commission.” That takes you to 129 words without even thinking.

Next, you want to use social media to drive traffic to this post – and awareness of the real world benefit of the services. Social media is for reach.

A simple tweet could be as follows: Partner closes mid-sized hosted PBX deal. Read the details here. Link.

The Facebook post could be similar, although you could use the brand name of the product. You could give a shout out to the partner (with permission). You could give a shout out to the client (with permission). This could be re-used on LinkedIn as a group post for partners.

If you wanted to get in-depth, you could do a podcast with the partner and/or customer or something simpler such as an email interview asking questions such as: How did you find this opportunity? (prospecting tip); What questions were asked? (discovery tip); What won the deal, and who was the competition? (market analysis).

If you did that just once per week for just four months, you would have about 17 stories, 17 concrete ideas about when your services are deployed – and hopefully why.

Any of these stories could be used to link to training (live, webinar or recorded) or a PowerPoint presentation on the product. At least, a link to a data sheet could be included. These could be construed as calls to action for the partners (readers). Smart marketing would make those actions measurable.

One reason to utilize your own Web site or blog is the ability to add analytics to the pages. The data collected can tell you what products are popular topics: who is visiting the page, and where they are jumping from.

The jump from point would be which link the visitor clicked to get to the blog post. Was it a tweet, LinkedIn, Facebook or even better an email? Data collected can tell you where to focus your time. It can tell you what social network is driving traffic; and which one isn't.

One reason to do this is to let other partners know that sales are happening. Another reason is to target partners that typically sell just simple network. To get them to sell other services, these partners need to be shown (time and again) that other partners are selling other products and banking on it.

What if you don't have a lot of partner sales (yet)? Use sales data from the direct team. Any sales force – direct or indirect – needs to know that the products are selling, what they are being used for, who is buying and why. We remember best through stories.

Here is the best part of stories: they are easy to tell and easy to pass on. Word of mouth is the best marketing. Social media just echoes that word of mouth through shares and re-tweets.

SMART CONVERSATIONS

Have smarter conversations. (Hugh MacLeod talks about this often.) If you are having the same conversations year after year with your partners, you will get the same results. Shake it up.

Share discovery questions with them. For instance, what is that customer going to do with 20MB of DIA?

- Why the big pipe? What are they running on it?
- Are they using VoIP or video or teal-time apps?
- What cloud apps are they accessing?
- Is there a backup service?
- Are their compliance issues?
- Do they have a call center? If so, call center software or voice backup?
- How vital is Internet to their business?
- What is the most vital software for the business?
- On MPLS, is one of the nodes a data center?

Discovery questions open up the possibility for add-on services as well as finding the hot button issue of the buyer. Discovery allows for a more complete solution to be designed for the buyer. The complete solution design is the differentiator (in some cases).

During the economic downturn, I was consulting with a top master agency on its social media. The strategy was to let agents know that business was still being done, that sales were still closing. We used social media to announce most of the orders that came in. “A jewelry store just bought a PRI.” “A bank just ordered an MPLS.” Being specific like that – what I call granular – allows the partner to know specifically what to think about in a given situation. Maybe he would never have thought that a jewelry store would buy a PRI. Maybe he thought they were two POTS lines and a DSL and that's all, sir.

It opens opportunity. You can do it via Twitter or via email.

You also can mention the money. As the joke goes, the way salespeople keep score – the money!

“Jewelry store bought a PRI. Agent scores \$500 Spiff!”

“IT shop deploys 25 HPBX seats including three call center licenses. Agent goes to President Club.”

“Did you know there are 4x MRC spiffs on backup, Lync and Exchange?”

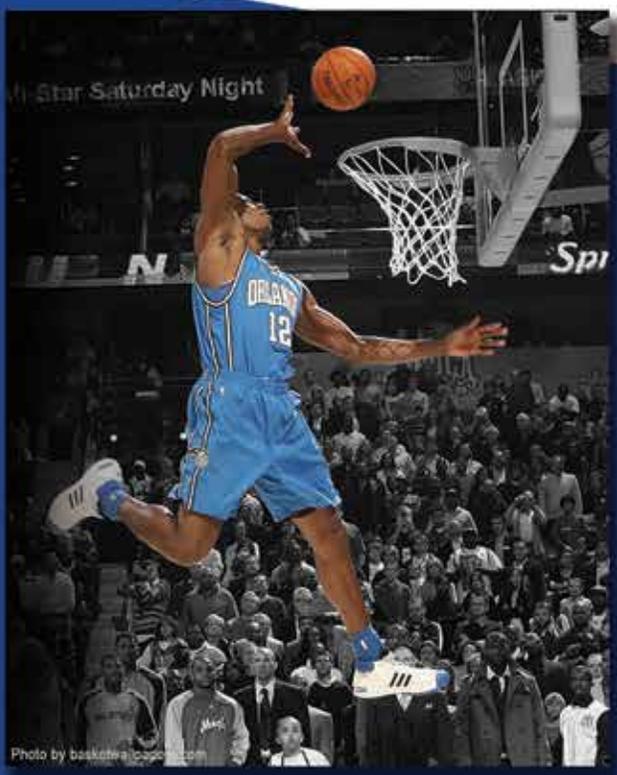
Looking at the service provider promotions, we often see several free months for customers as well as several spiffs on new products such as Managed Office. Good stuff to pass on.

Peter Radizeski

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