



Deal Registration Best Practices For Technology Vendors

BY TEAM VARTOPIA



Contents

- Executive Summary **2**
- Program Strategy **4**
- Program Design **7**
 - Create the Optimal Partner Experience **7**
 - Optimize for Internal User Effectiveness **11**
- Program Execution **15**
- Registration Best Practice Checklist **19**

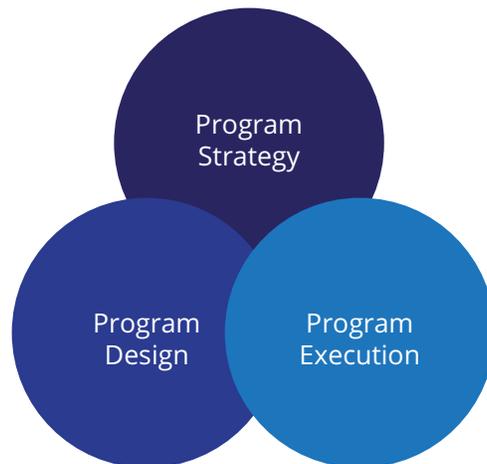
Executive Summary

In today's technology channel landscape, there are three concurrent shifts altering the way enterprise technology is bought, sold and consumed. In a period where all three parties – Buyer-Seller-Supplier – are being dramatically transformed, there's a strong desire for fact-based insight sources to satisfy the need of CFOs, sales and marketing executives alike. For most vendors there is a readily available source of fact-based customer and partner impact assessment: deal registration. Approved deal registrations are that single kernel of actionable data insight that lies at the intersection of both the buyer's and seller's journey as well as the reseller's and vendor's opportunity pipeline.

The key to managing your partner-driven pipeline is visibility. Visibility helps to avoid conflict, motivate channel partners to share information sooner, more effectively allocate channel resources, improve communications while reducing costs/complexity, provide timely sales and marketing tools and, of course, close more deals.

Having an opportunity or deal registration program has emerged as an industry best practice for gaining greater pipeline visibility for indirect sales channels. It has also become an effective tool in many vendors' efforts to drive channel business transformation. Deal registration programs help drive desired partner behavior, enhance partner collaboration, reduce channel conflict, measure partner performance, provide real-time visibility into channel pipeline and have become a key mechanism in delivering incentives to channel partners and partners' employees for partner-driven business.

With more than 400,000 registrations from over 1,700 resellers and by working nearly all of the leading technology vendors as well as many emerging vendors, we've learned a few things along the way about program strategy, design and execution. We've consolidated it all here for you.



Best practices are those that are adopted; the history of CRM and channel marketing automation tools, including deal registration, has not always been a positive one. Thinking through your program strategy as a precedent to design, development and execution should ensure that what gets implemented is well aligned with your partner strategy. Designing for the best possible user experience can overcome many impediments in program adoption and utilization in the implementation phase. Finally, execution is the watchword of partner program success; without nearly flawless, consistent and continuous execution it can be easier to lose the trust and commitment of an independent channel partner than to earn its long-term loyalty.

"IT'S NOT THAT I'M SO SMART, IT'S JUST THAT I STAY WITH PROBLEMS LONGER."

- ALBERT EINSTEIN

Program Strategy

Objectives

To reach their full potential, deal registration programs should begin with clear objectives aligned with your partner strategy and a compelling value proposition for your partners. Couple that with simple, easy-to-follow workflows and continuing communications to engage partners' adoption and ensure partner satisfaction.

Business and Partner Strategy

What are your near and long-term business goals? How do your channel partners contribute to those goals? Are you 'all-in' when it comes to the channel? Operating a hybrid direct/indirect model – and need to manage potential conflict? Or are you (re)entering the channel to accelerate scalable growth and reign in sales expense?

Partner Objectives

What are your specific goals with respect to partners? Are you aggressively looking to grow your partner network with new partners to cover new geographic territories, new industry verticals or enter new market segments? Or are you over-saturated in certain markets, looking to preen your partner portfolio to better match your channel team's ability to support effectively? Or are you simply in a fight for share of partner wallet to wean the most revenue out of each partner relationship – and beat the competition?

More than likely, you've also got some important objectives to improve your channel partners' ability to move consistent with your growth strategies. Are you trying to shift all or some of your partners to recurring revenue? Are you focused on lifting up the technical and solution selling expertise of your partners' employees to meet customer demand?

None of the above will likely appear directly in any of your deal registration program materials or on your registration submission form. But without clear answers, you may well have a successful deal registration program that isn't aligned to your company's business strategy, wasting necessary resources and potentially giving away margin with no benefit to your business. This first step can frame what you want from the channel partner relationship and next will frame the benefits to your partners.

Partner Value Proposition

Central to your partner program is the partner value proposition: the gives and gets of why any business partner would want to do business with your firm – either as a new partner or long-term, loyal partner. Managing customer opportunities for maximum benefit to both parties is a key component of the partner value proposition for any indirect channel.

In resale channels, deal registration can be a key economic driver as it often is accompanied by incremental margin or discounts and/or rebates. The key is to ensure that your incentives are fair, affordable and do not create disincentives or unintended consequences. Channel incentives should be structured to motivate partners both at the company level and at the individual or team level as optimally as possible.

Most partner programs are tiered, e.g. Gold-Silver-Bronze-Authorized, delivering incremental benefits to partners based on their investments in the partner relationship (training and certifications, etc.), their value-add (unique specializations, industry expertise, trusted information source, etc.) and the results that they achieve (either directly or indirectly contributing to revenue).

Deal registration should be designed to support optimal results from partner-generated leads to level the playing field for partner-sourced opportunities. So a common practice is to offer a deal registration discount that is marginally larger than the delta between top-tier and lower tier partners. For example, if standard Gold partner pricing includes a 40 % discount, Silver a 35% discount and Bronze a 30% discount, then a 10% additional discount for approved deals would result in the Bronze partner having the same net cost as the larger Gold partner for an approved registration. This allows a lower tier partner to compete with larger partners when they were 'first-in,' and it can help partners with greater pre-sale investments protect those investments and their opportunities from predatory practices.

Program strategy should include input from all of your stakeholders – internal and external.

Key Stakeholders

Internal Stakeholders

Because deal registration integrates with your PRM, partner portal and other channel automation systems as well your CRM, design and execution will impact nearly every operational entity to some extent including corporate, operations and field management, IT, finance, legal, tax and compliance.

Of course, the main stakeholders are channel/sales management and the field sales/support teams, including channel/partner account managers responsible for managing your partner relationships.

External Stakeholders

The primary user of any deal registration system is, of course, a partner organization's owner and their authorized employees – in sales (sales rep), technical sales (SE), marketing and admin.

Depending on your route-to-market, distributors may be key stakeholders – either because the discount earned from registration is provided through their order fulfillment processes or as program evangelists and/or proxy submitters on behalf of non-authorized partners. Looping the distributor into the registration communications workflow when known is becoming a standard best practice.

Research – Your Partners and Your Competition

Are you fully aware of the business requirements and partner benefits of each of your competitors' programs? Our experience shows that most companies are aware of competitive programs at the surface level, but most lack a keen understanding of the actual partner experience and how the programs are operationalized.

Understanding how it works for partners operationally enables you to design a program that meets the needs of both partner management and the partners' employee users – sales, technical, marketing, admins, etc.

Test your straw man with a few trusted partners – it can save you the need for post-launch course corrections. Do you know where you stand in the eyes of your partners? Ask your partners:

1. What is of most importance to you in registering deals early in the process?
 - a. Optimizing their profitability?
 - b. Growing their business with you?
2. What are the most important things we can do to make it easier to do business with you?
3. How can we help you manage the deal registration process most efficiently and effectively to meet your needs?
 - a. How do you operationalize deal registration in your company?
Is it centralized or decentralized?
 - b. Are you using a CRM tool? If so, which one, and have you integrated deal registration activity in your CRM?

Only by starting with your partners' needs – business model, strategic fit, financials, sales enablement and operational mode – does the program help support them. This should serve as the “end in mind” that informs your design team.

Program Design

The CompTIA 2013 Third Annual State of the Channel Study: Channel Conflict and Deal Registration Trends reported that more than eight in 10 channel firms surveyed said the existence of a deal registration program is a critical or important factor into their decision to partner with a vendor.

Yet for many deal registration programs, little has changed since then to correct the three deficiencies it reported:

- Poor communications (cited by 61 percent of channel partners). Examples include insufficient reporting on approvals and payout status and lack of information on incentives.
- Technical challenges (49 percent) when deal registration systems and tools are hard to use.
- Inconsistency (27 percent) when rules of engagement and adherence to rules are constantly changing.

What has changed is that a growing focus on channel business transformation places an even greater need for good program design and flawless program execution. Program adoption and utilization will continue to be critical success factors – the more you can reduce friction during rollout and implementation phases, the faster you'll achieve success.

Creating the Optimal Partner Experience

Partner Experience

No matter how a partner employee navigates to your Register a Deal page, the most important consideration for any deal registration system should be to keep it simple and to respect your partners' time. Complex forms and onerous details can be counter-productive to obtaining customer and opportunity insight early in the selling process. Create a compelling user experience that's easy to access via your partner portal or directly.

Keep it Simple – Make it Easy

Pipeline visibility is a core reason for registering deals – the earlier the better.

A partner sales rep or SE is looking at hundreds of messages a day and generating tons of data along the way.

To begin to register a deal, it should be as simple as identifying the customer and the unique opportunity first. Forms should be simple, easy to complete and not ask for any unrelated data – your PRM should already know who, what partner, etc.

After you've got the opportunity profile basics, then you can capture the additional qualifying data (estimated revenue, competition, customer environment, etc.) and more detail about the specific solutions.

acme GLOBAL™

DEAL DETAILS

Opportunity Description

This is just an example of a possible registration page layout. The system supports logic driven questions and each field has configurable parameters that can be used to enforce program rules such as minimum deal size etc. We can also include product catalogs that can be dynamically imported from a remote database via API etc.

Your Question Here <input style="width: 95%;" type="text"/>	Your Question Here <input style="width: 95%;" type="text"/>
Your Question Here <input style="width: 95%;" type="text"/>	Your Question Here <input style="width: 95%;" type="text"/>
Your Question Here <input style="width: 95%;" type="text"/>	Your Question Here <input style="width: 95%;" type="text"/>
Estimated Booking Amount (Required) <input style="width: 95%;" type="text"/>	Estimated Close Date (Required) <input style="width: 95%;" type="text"/>
Currency (Required) <input style="width: 95%;" type="text" value="USD - U.S. Dollar"/>	Primary Competitor (Required) <input style="width: 95%;" type="text" value="-- Select One --"/>
Product Type (Required) <input style="width: 95%;" type="text" value="-- Select One --"/>	

While many partner organizations have centralized deal registration for their own management convenience, not everyone chooses to operationalize the process. So, design your process to be successful at the end point – the sales rep or SE who’s talking to the customer.

The simpler the request, the more likely it can be completed quickly and the earlier in the process you can request it.

Empower the Administrator Role

The primary role of the partner or company admin in any channel automation tool is to manage the resellers’ users and serve as a conduit for program information. Unique to Vartopia, the company admin also has the function for managing sales territories and managing vendor connections.

Be sure that management reporting is readily available to ensure that they can manage their registrations at the company and individual level – using their own tools.

Make it Rewarding

A growing list of vendors now offers spiffs to sales reps and/or SEs for approval of partner-driven registrations. While spiffs have a long history in the channel – traditionally they were earned for closed business – moving the incentive to the pre-sale stage eliminates many of the concerns of potential conflict between vendor and reseller and ensures that both have early visibility.

Make it Easy to Use and Easier to Manage Registrations Within Their Business Workflow

Make it easy and visible for your channel partners and their sales users to see all their activity on a single dashboard and drill down detail for actionable data. Enable your partners to use and manage registration within their business workflow.

Design for Centralized and De-centralized Processes

Resellers each have their own business processes for managing their opportunity pipeline – including your potential customer opportunity. Enabling partners to operationalize the way they want can lead to better adoption. Whether the partner chooses to operationalize opportunity registration via a centralized or decentralized process, they will need to be able to manage the process efficiently.

Managing Sales and Sales Territories

By enabling partners to set-up sales users and sales territories, partners can manage deal registration activity as they would any other sales-related activity. This enables them to manage all the deal registration activity using their sales management processes with a clear line of sight for sales managers and executives to monitor sales rep and/or reg desk utilization if they choose to manage registrations centrally. This reporting also enables them to part of your QC by providing visibility to your responsiveness in approving and/or denying submitted registrations.

Role-based Access

- Partner roles for Marketing, Sales, etc. is to
- Reseller Account Holder (Owner/Executive)
- Sales Rep
- Marketing/Analytics User
- Reseller Admin
- Reports User

CRM Integration Tools for Resellers

By now, most resellers have CRM tools of their own – allowing them to manage all of their pipeline much the way you manage yours. If your deal registration system integrates fully with their CRM tools, your transactions are assured of being highly visible – not buried in some screen with logins/passwords they've long forgotten.

Many vendors argue that they want to make resellers log in to their partner portal every time they need to register a deal to leverage deal registration to drive partner portal utilization and to make sure resellers see the latest content to support their sales effort.

Our reseller community would beg to differ. In their view, anything that requires effort that could otherwise be spent on the customer is time wasted and unnecessary expense. Just as you want to avoid unnecessary manual updates through integration with your company's Salesforce, so, too, do your channel partners want to maximize their CRM investment.

Facilitate and Reward the Right Behavior to Prevent Reseller Abuse

In the design phase, it's important to make sure that business rules are clear and workflows are created that minimize the opportunity for abuse. Perhaps it's a bit counterintuitive but we've found that the best way to prevent abuse is to make it stone cold simple to follow the rules and back it up with easy-to-use management tools for both the partner and your sales teams to utilize.

Business Rules: Avoid Conflicts and Promote Driven vs. Given

Clear business rules, consistently enforced, are central to any deal registration program. Any deal registration system should be able to minimize exposure to potential conflict when multiple partners are competing on the same deal. The system can readily provide date stamp and other qualifying data to make sure approval decisions are prompt and fair.

Finally, the registration system should be designed to ensure you can distinguish between partner-driven business created from the partner's marketing efforts and those leads provided to the partner for fulfillment.

Connecting Registration to Marketing Activities

Determining Return on Marketing Investment (ROMI) can be achieved by linking marketing campaign data with registration data using APIs. This can include both demand generation activities executed through a vendor's direct marketing automation tools and from Through-Channel Marketing Automation (TCMA) tools provided to the partner (often subsidized with MDF).

Connecting MQL and source information to the registration object can enable robust reporting to determine marketing attribution so its influence can be measured along with what's working (and what needs improvement) in your/your partners' marketing campaigns.

Optimize for Internal User Effectiveness

Turning our attention now from your partners' user experience to the business needs of your internal users, the same principles apply – keep it simple, integrate with other systems so the user can work in their system of choice, and avoid unnecessary manual updates through automation even if the business process requires a human touch to ensure partner performance conforms to your requirements.

Integration – CRM/PRM/Marketing Automation

Deal registration is a key component of any channel automation system. In fact, deal registration is so fundamental to successful channel management that it's either 'built-in' or offered as an add-on module in nearly any PRM system. But these one platform/many module solutions are created with deal registration that only nominally integrate with a vendor's CRM by passing information to/from the vendors' CRM. They fall short of *improving* a vendor's CRM to more efficiently manage partner-driven business.

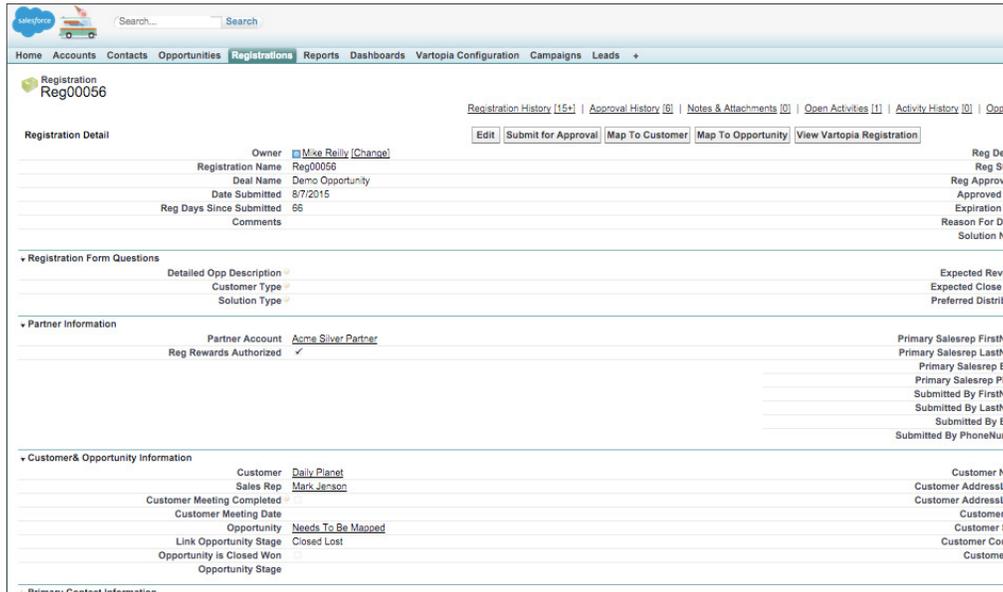
This is only accomplished by inserting a managed package within the CRM to better manage registrations independently of leads and/or opportunities. Treating registrations as a separate object in the vendors' CRM is a best-practice – one we learned from connecting with a multitude of deal registration systems of leading vendors. Best-of-breed solutions for deal registration should include these enhancements.

No matter what approach you take, be absolutely certain to make it actionable for your sales teams to see/approve/track from within their CRM environment and for your partners to operationalize the process in their organization. Internally, this means keeping it simple so sales teams do not have to use both CRM and PRM tools to see the whole picture. For your partners, this means enabling your partners to use reporting tools that ensure that have visibility to all your registration activities in one place and, for a growing number, empowering them to integrate the registrations in *their* CRM.

Leveraging Salesforce

Salesforce is the screen of choice for many – the more your users can do all their required tasks completely within Salesforce, the less training is required on other systems. The more the reporting and analytics are available, the more integrated use that data will be in their day-to-day processes.

While your sales users may be comfortable with leads and opportunities – recognize that registrations are different and need to be treated as such.



Options for Managing Submitted Registrations

Salesforce lets you ‘manage’ submitted deal registration requests in any one of three ways: using lead object, an opportunity object or a custom object. Any of these can work when accompanied by a strong business process, well-documented workflows and good discipline; in our experience, however, only one is optimal. Here’s why.

Salesforce
Lead Object

Salesforce
Opportunity Object

Vartopia
Registration Object

Lead Object

Many of the available PRM tools use the Salesforce Web to Lead features to capture registered opportunities in a vendors’ CRM as part of their deal Registration module. Even if you have not implemented PRM, leads captured on your website can be ported to your CRM using Salesforce web to lead features. By managing a registered deal as a ‘lead’ in Salesforce, you can take advantage of the native ‘Find Duplicates’ functionality; set-up routing rules for lead review and use the lead conversion process to map to existing accounts and contacts if available. This can help flag deals where there’s potential conflict and helps protect the data quality in a vendor’s CRM. However, when using the Salesforce lead conversion process, the converted lead record can no longer be viewed; decidedly not a best practice.

Opportunity Object

If you have a small volume of deals and they are being inputted directly by a single source, for example, a channel manager, using the opportunity object saves the lead conversion process, but in doing so it makes mapping a manual process.

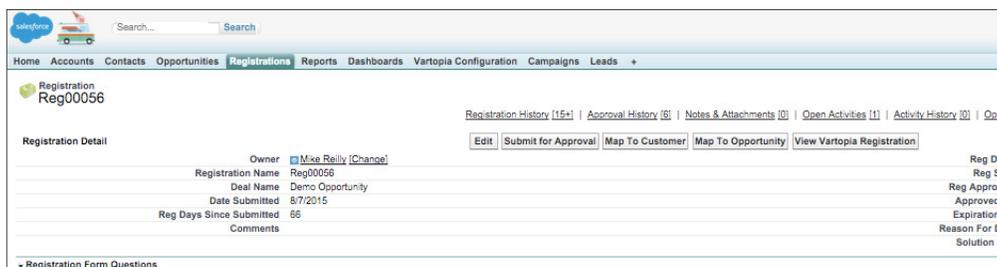
As with any lead converted to an opportunity, once assigned, it's only available to the owner of that Salesforce account or opportunity. Overall, this practice is not easy to scale and, thus, is generally less desirable than using the lead conversion process. Nor does the practice offer the flexibility, auditability and visibility of using a custom object to manage registrations comprehensively within Salesforce.

Registration Object (Custom)

At Vartopia, after adapting our deal registration submission process to conform to the intake requirements of the leading vendors, including Cisco, Dell, EMC, HP, NetApp and Symantec, we found that they each deployed a model that used a separate custom object for registration – and often at great expense. Clearly, the web-to-lead functionality, while perhaps scalable, fell short of capturing and maintaining all the critical information needed to effectively manage channel conflict and ensure channel partner trust.

Vartopia's Salesforce managed package is a best practice example that creates a custom object. We have found this to offer the most flexibility, control and most complete audit trail – deal registration is a contract, making this a critical consideration. With a registration object – the date/time stamp – the original details are preserved, including both the reseller submitter and the reseller sales rep, while the mapping functions enable each submitted registration to be mapped to the vendor's customer account, contact and opportunity records. This makes it easy for vendor sales teams to identify if there's already an existing opportunity being worked and/or if there's another partner already engaging the customer.

Example Registration Record:



Connecting Reward Eligible Activities through Registration

Partner level incentives are fundamental to the success of any deal registration program. Driving partner behavior, however, can be further extended to the partner sales rep and sales engineers by linking rewards to a registration’s approved and other related steps-to-the-sale all the way through to closed won and renewal.

This enables vendors to shift incentives toward a better balance of company and individual incentives and place more emphasis on pre-sale vs. post-sale activity for maximum impact. Placing the reward much closer to the actual behavior increases its motivational impact for the sales rep or sales engineer.

With transformational changes brought on by cloud and hybrid business models, the ability to touch the individuals in a partner organization that are making an impact is all the more critical.

Registration rewards is a unique method to do all of this while also streamlining the internal support requirements needed to administer a traditional channel spiff. Using registration information and workflows to inform the spiff payment, the internal administrative burden can be lightened and nearly eliminated. Combining registration workflows with virtual payment platforms enables nearly instant, global, mobile, secure delivery of the reward.

Example:

The screenshot shows a CRM interface for a registration record. The main header includes navigation tabs like Home, Accounts, Contacts, Opportunities, Registrations, Reports, Dashboards, Vartopia Configuration, Campaigns, and Leads. The registration ID is Reg00058. The form is divided into several sections: Registration Detail, Registration Form Questions, Partner Information, Customer & Opportunity Information, Primary Contact Information, Lead Information Section, TPMA Information, and Reg Reward. The Reg Reward section shows an approved reward amount of \$250.00 and a closed deal reward amount of \$1000.00.

Registration Detail		Reg Deal ID: D-48903245	
Owner: Mike Reilly (Change)	Registration Name: Reg00058	Reg Status: Approved	Reg Approval ID: A-95055037
Deal Name: Demo Opportunity	Date Submitted: 8/12/2015	Approved Date: 8/12/2015	Expiration Date: 12/10/2015
Reg Days Since Submitted: 61	Comments:	Reason For Denial:	Solution Name:
Registration Form Questions Partner Information Customer & Opportunity Information			
Customer: Daily Planet	Customer Name: Daily Planet	Customer AddressLine1: 1000 Broadway	Customer City: Metropolis
Sales Rep: Mark Janson	Opportunity: Reg00058	Customer State: KS	Customer Country: USA
Customer Meeting Completed:	Link Opportunity Stage: Prospecting	Customer Zip: 03902	
Customer Meeting Date:	Opportunity is Closed Won:		
Opportunity Stage:			
Primary Contact Information Lead Information Section TPMA Information			
Reg Reward Approval Reward Authorized: <input checked="" type="checkbox"/> Approval Reward Qualified: <input type="checkbox"/> Approved Reg Reward Amount: \$250.00 XTRM Approval Reward ID: XTRM Reg Approval Reward Status:		Closed Deal Reward Authorized: <input type="checkbox"/> Closed Reg Reward Qualified: <input type="checkbox"/> Closed Deal Reg Reward Amount: \$1000.00 XTRM Closed Won Reward ID: XTRM Reg Closed Won Reward Status:	

Program Execution

Deal registration is a relationship tool, building trust as it helps you build a more robust pipeline leading to profitable growth both for vendors and for their channel partners. Trust is earned – and any misstep can have debilitating consequences. So the most important component of any deal registration system – irrespective of the technology used to support it – is that it creates a flow of information that’s both actionable and acted upon.

Beyond the program design and benefits, the keys to success include communications, training, motivation and measurement.

“SUCCESS DOESN'T NECESSARILY COME FROM BREAKTHROUGH INNOVATION BUT FROM FLAWLESS EXECUTION. A GREAT STRATEGY ALONE WON'T WIN A GAME OR A BATTLE; THE WIN COMES FROM BASIC BLOCKING AND TACKLING.”

- NAVEEN JAIN

Communications

Communicate Clearly, Consistently and Continuously

Be very clear and specific about the rules of engagement – what are the qualifying deal criteria and related events as well as how to register.

Be consistent and timely in approvals/denials; resolve conflict quickly. Publish and adhere to SLAs.

Continue to track deal registrations through to close and incorporate into partner account manager reviews with channel partners.

Ensure Compliance Consistently

Compliance with program rules is essential to successfully resolve and, more often, avoid channel conflict. Eliminating conflict and pre-empting predatory behavior among partners should be designed into the program’s rules of engagement, but it must be monitored closely and managed carefully to ensure competing deals are not being supported.

Training

Training partners – and their employees – on the rules of engagement and how to use the tools available will help avoid conflict and increase their ability to succeed.

As with the introduction of any new channel automation tool or partner program benefit, providing partner training is essential to program adoption.

Motivation

Partner adoption is critical to the success. Carefully measure partner engagement at each step of the process. If partners aren't using the program as you expected, don't wait for the end of the year or quarter to find out why. A new deal registration program should lead to increases – often dramatic increases – in deals submitted for approval.

Another critical measure of how effectively adoption is occurring at the partner level is the number of sales team members that are actively using the system. The more broadly used the better. Schemes designed to limit the number of partner users are counter-productive and should be avoided.

Making it available broadly is important, but many partners have centralized registration desks that submit all qualifying registrations on behalf the sales team. Registration data should have the partner's sales rep and SE information.

Reward Desired Behaviors

Rewarding sales reps and SEs for registering deals early in the process improves line of sight to the partner-driven pipeline.

Spiffs have long been a common practice to reward partner sales reps when an opportunity results in a closed sale. A best practice would be to shift some of that investment to earlier stages in the sales process. This keeps partners' sales people more engaged in the process and helps ensure earlier visibility, moving the reward much closer to the desired behaviors.

Many companies now offer spiffs for 'approved' registrations – contingent on their qualification in vendor's opportunity pipeline – and then a second spiff when the deal closes rather than placing it all the end of the sales cycle.

Measurement

Use Reporting to Drive Partner Planning

Monitor the registration data in your CRM or the deal registration portal to track trends at the partner level and, if possible, individual sales rep level:

- Registered deal velocity – How many deals are being submitted?
- Registered deal value – What's the estimated deal value — average, mean, trend, etc.
- Deal registration quality – What's the approval rate? How many deals are being denied or rejected? Why?

- Approved registration/opportunity – What’s the close rate? How many partner driven opportunities are being closed? Is the close rate better for registered deals? How does it compare with marketing generated leads provided to the partner?
- Speed to approve – How long does it take to approve deals? If not optimal, what can be done to improve?
- Close dates – How long is the sales cycle? Do registered deals close faster? How can we leverage the deal registration to help partner close more deals faster?

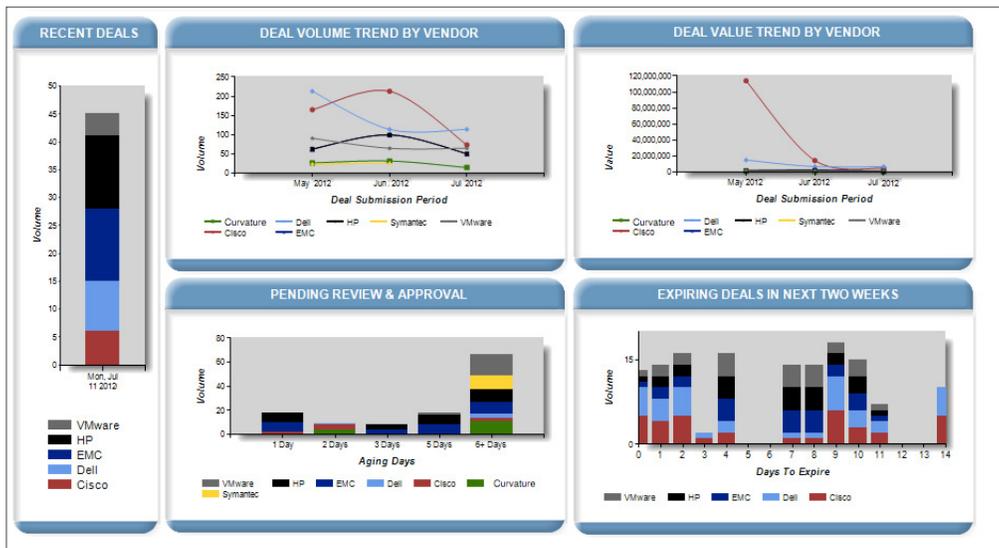
Assuming your partners are using tools like Vartopia that track their registration activity based on their territory and sales model, using registration activity reporting can help quickly identify any bottlenecks and as well as feed the partner planning process with easily accessible data.

Although access to a resellers’ reports is limited to their authorized users, understanding what information is available to them – at a company-wide level, segmented by their sales territories or at the individual sales rep level can make business planning more collaborative and productive.

Review the program’s success: How effective is your deal registration program in making it easy to do business with you?



Add a review of the partner’s success: How is the program adding to partner revenue, deal size, close ratio, margin and profitability while reducing labor costs?



When possible, drill down to the individual sales rep to track specific opportunities as needed. More importantly, identify the leaders to help others learn how they can be more successful.

The screenshot shows the 'My Registrations' dashboard with a table of deal details. The table includes columns for Sales Rep, Customer Name, Opportunity Name, Vendor, Deal ID, Vendor Status, Status, Expires On, and Amount.

Sales Rep	Customer Name	Opportunity Name	Vendor	Deal ID	Vendor Status	Status	Expires On	Amount
Customer Name: All Better Hospital (From 1 deals)								
Michael Reilly	All Better Hospital	Demo	Curvature	12345	Approved	Approved	2/9/2016	\$50,000
Bruce Wayne	Yummy Food Inc.	Demo	EMC	79345	Approved	Approved	2/9/2016	\$50,000
Customer Name: Acme Construction (From 1 deals)								
Clark Kent	Acme Construction	Demo	Curvature	12345	Approved	Approved	2/9/2016	\$10,000
Customer Name: Monster Bank (From 2 deals)								
Michael Knight	Monster Bank	Demo	Curvature	12345	Declined	Denied		\$40,000
Michael Knight	Monster Bank	Demo	Cisco	866553	Submitted	Submitted	10/12/2015	\$10,000
Michael Knight	Monster Bank	Demo	VMware	ORTN-59493	Submitted	Submitted	10/12/2015	\$10,000
Customer Name: Yummy Food Inc. (From 2 deals)								
Bruce Wayne	Yummy Food Inc.	Demo	Curvature	12345	Submitted	Approved	4/12/2014	\$40,000
Bruce Wayne	Yummy Food Inc.	Demo	Cisco	768798	Approved	Approved	4/12/2014	\$40,000
Bruce Wayne	Yummy Food Inc.	Demo	EMC	23456	Approved	Approved	4/12/2014	\$40,000

Vendors who think through their deal registration strategy, design programs that optimize the reseller’s user experience, and commit to quality execution will position themselves to earn the long-term loyalty of their independent channel partners.

Best Practice Checklist

PROGRAM STRATEGY

- Align your business, partner and program strategies
- Identify the key behaviors you need to drive
- Line up the key stakeholders required to ensure success

PROGRAM DESIGN

- Research your competitors' programs
- Create a compelling Partner experience responsive to their needs
- Optimize the internal user experience

PROGRAM EXECUTION

- Communicate benefits to partners and partner employees
- Train the partner and employees on process and use of tools
- Reward the right behaviors early in the process
- Measure program and partner effectiveness

About Vartopia

The First Multi-Tenant, Multi-Vendor Deal Registration System

The Vartopia platform was created by channel experts for reseller ease of use and vendor empowerment. The Vartopia network facilitates sales collaboration on qualified opportunities that allows for better forecasting, improved pipeline development, and ultimately, increased revenue.

CONTACT VARTOPIA to learn more.

SCHEDULE A DEMO to see the power of the Vartopia platform in action.

CONNECT

