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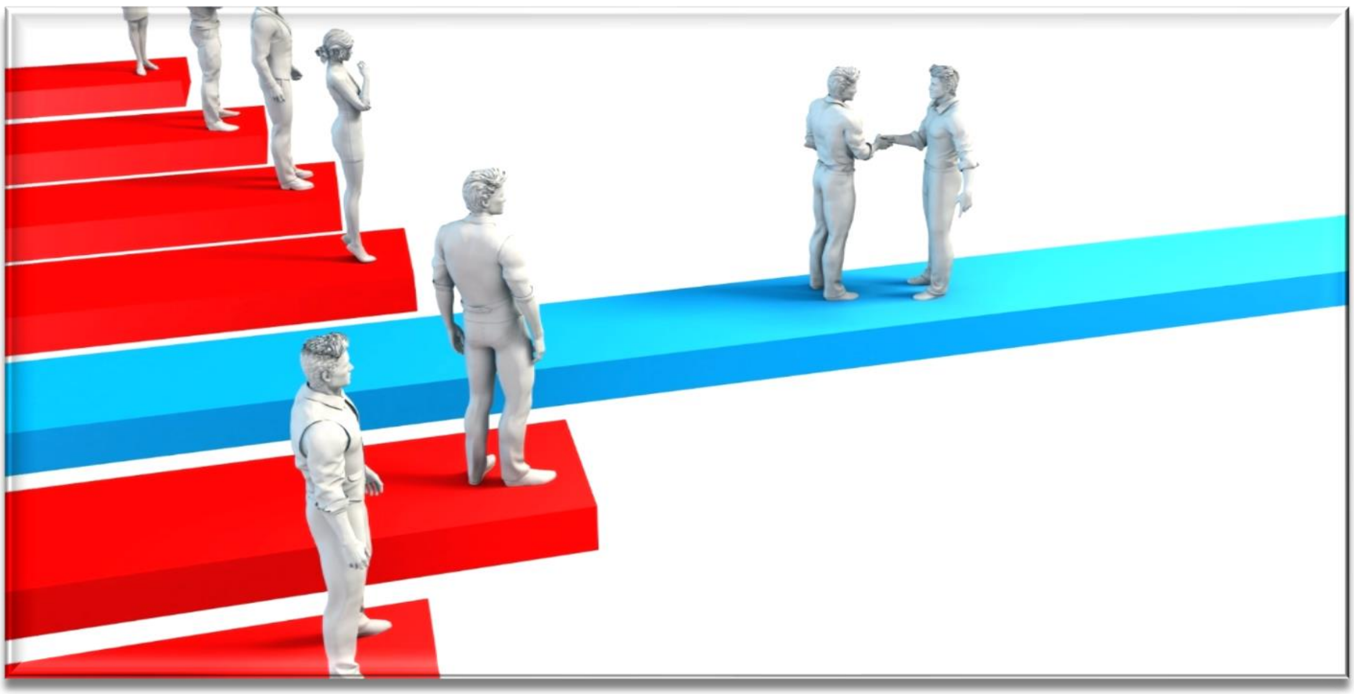
ACCELERATE METHOD

“Best Practises for Account Mapping through Partner Enablement”



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Introduction to Account Mapping

Welcome to the Accelerate Method of Account Mapping. In this ebook we will provide a roadmap to accelerate your revenues from your Partner and Alliance Program.

Before we begin, this material is developed for those organizations that rely on or want to grow their referral partner business and improve their ***Sell With*** productivity as it relates to Field Rep engagement.

> *Strategic partnering is valuable, but extremely difficult to execute. Territories shift, salespeople come and go and businesses change. Identifying shared accounts is time-consuming and manual-with disparate spreadsheets, countless calls and emails.*

This model is particularly of interest to Cloud ISV's that sell their application with other software or services in a "Layer Cake" solution.
Companies that Partner and rely on Indirect Sales, will sooner or later struggle to expand revenues, track and account for Leads/Opportunities/Sales when co-selling.

The Opportunity for ISV's

The Ecosystem that revolves around your product is a fertile place and business development in your Ecosystem is key to accelerating the revenues of your business. Agile Selling through your Partners needs a unique sales process and training.

In most cases no one has trained Field Sales Reps how to; Sell With, Talk to Partners and accelerate Sales with Partners.

There is a marked difference how your Partner Facing employees support you Partner Field Reps in a way that ensures the acceleration of sales vs your own internal employees.

The Accelerate Method Sales Enablement Training provides Cloud Software Companies with the Tools they need to partner smarter, automatically align their Sales Teams with those of their Partners and create the predictable revenue they desire.

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This training teaches Field Reps

- How to bring value to the Partners you deal with
- Use sound methodology and powerful Tools to Bridge the gap between yourselves and your partners
- Uncover Leads and Revenue laying dormant in your Ecosystem
- Better understand the Ecosystems your solution touches in a way that can increase wallet share, and extend your portfolio of customer types.
- Teach Field Reps HOW TO SELL through Partners
- How to communicate with Partners
- How Field Reps can accelerate sales with Partners

*"I spoke with a smaller Cloud Reseller. 'We recently lost an important account to a CPA firm. They knew all about the clients business needs and put in a Cloud based ERP and business analytics system. I figured we had 2 choices; try and compete with their business knowledge, or try and partner with them. I approached them, we've just closed our second deal together! They bring the business expertise, we have deeper technical skills, - who knows where this might go.."**

Account Mapping Basics

It is acknowledged that the hardest part of Partner Enablement is uncovering mutual connections and supporting Field Rep to Field Rep engagement. If this is not accomplished Channel Revenue slows and the acceleration of Co-Selling efforts is not possible.

What is Account Mapping?

•See exactly which accounts you have in common with your Partners

•Stay up-to-date on activity (Leads/Opportunities) within these mutual accounts

•Exchange mutual account intel when it matters, track notes, results by Partner and Product

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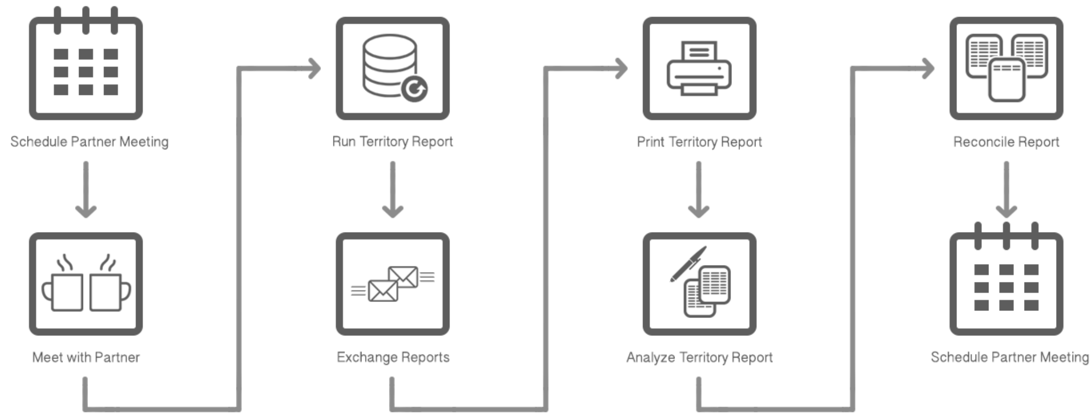

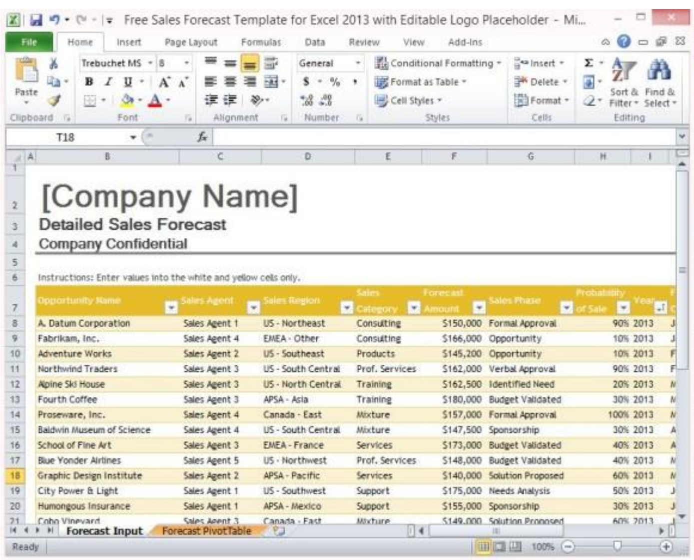

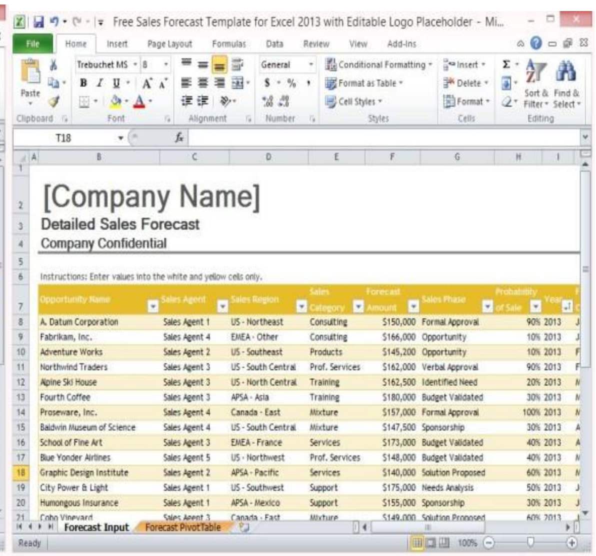

Measurement of Partner and Alliance Channel Success

(How do you capture these metrics?)

Lead Volume	Pipeline Units	Pipeline ARR	Closed $	Utilization Rate	Accounts Mapped	Intel Ex-changed

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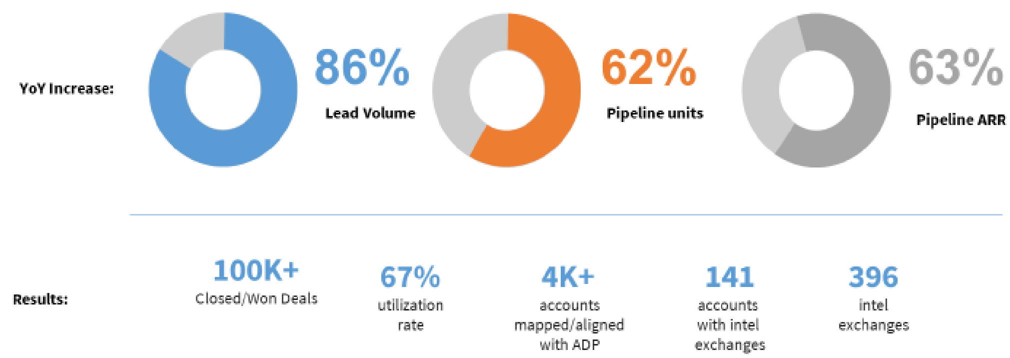
Recent Client 5 Week Pilot Results

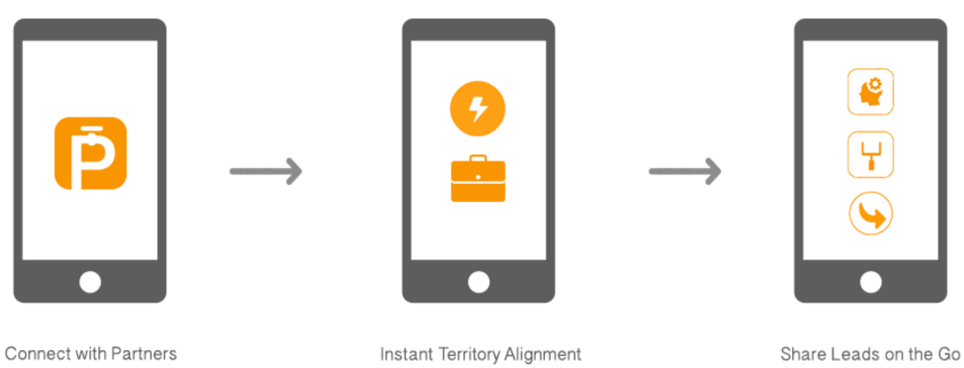


***The Accelerate Method* is a transformational framework that takes Cloud Software Vendors**

FROM: Manual non productive Account Mapping

TO: Mobile enabled collaboration that uncovers: Leads, Opportunities and Revenue in existing Partner Accounts and drives net new leads, faster pipeline growth, and higher close rates with deep system integration to alleviate the need for manually managed spreadsheets and communication.

Light Up Your Leads



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Framework

	CLOSE	PARTNER LAUNCH Leads Sync (80%)	REP TO REP Account intro (60%)	DEAL FLOW Initial Investment paid in 30 Days	**B** **Automated**
	COLLABORATE	ENGAGE Rep-Rep Company to Partner	TRUST Data is exposed based on Trust	SHARE Leads/Accounts/ Opp's/ Contacts	
	CONNECT	RULES of Engagement	How to Sell With	KPI ARR/ Accounts Mapped/Uti-lization Rates	
A Manual					

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Playbook for Field Reps who "Sell With" Partner Reps

> "The same Partner may want to work with you in multiple different ways."

Questionnaire To Determine YOUR Gap between A and B

Does your company build solutions with Partners?	
Have you embraced the notion that solutions that combine several (more than 2) applications into a single solution have superior "stickiness" with the customer and higher MRR?	
Do you Prepare Pre-Pipeline reporting?	
Can you measure the use of your application at the customer level to allow attribution to the Channel Co-Sell Enablement? The collection of metadata about use of your products and customers as part of a solution stack can drive partnering in the SELL WITH world	
Agreed upon Corporate KPI that acknowledges Channels value to the business	
Know when your Partner Reps are engaged with your target accounts	
Does your Partner Channel have a communication bottleneck between your sales team and your Partners (ie: Blackhole)?	

CONNECT

RULES of Engagement	How to Sell With	KPI – ARR/Accounts Mapped/Utilization Rate	
Map your Sales Organizations Rules of Engagement	Field Rep Training Program	Key Performance Indicators that drive your organization. How will data be collected and presented	

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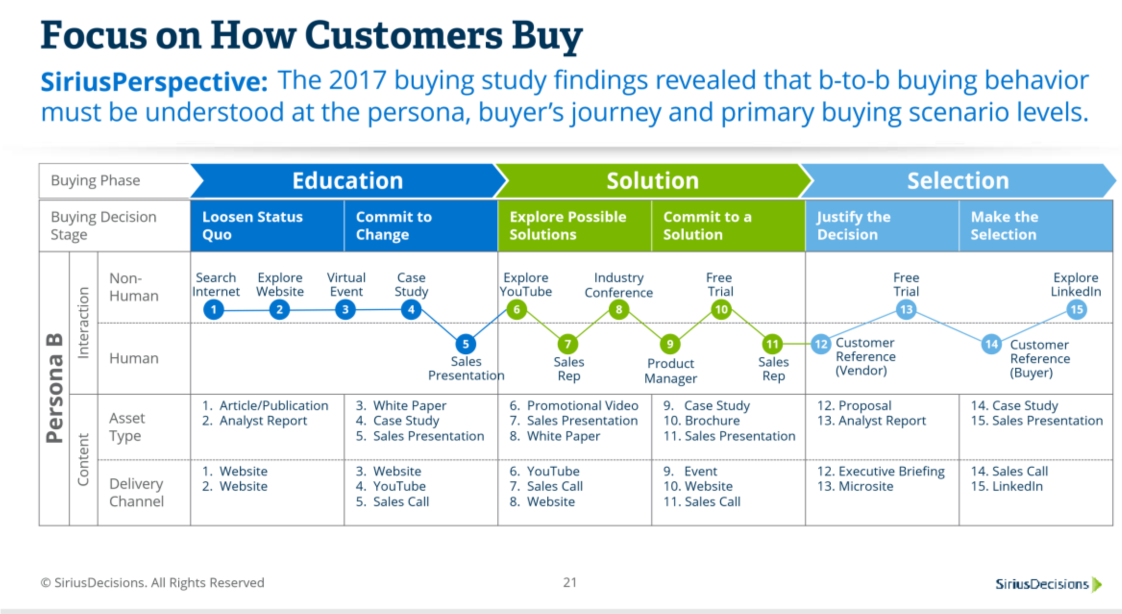
Simple Spreadsheet or Funnel Chart



LEAD LIFECYCLE

Inquiry	MQL	SQL	SAL	Opportunity	Closed Deal
Suspect	Prospect	Qualified Lead	Qualified Lead	Sales Opportunity	Client/Customer Meets all 4 Criteria
Meets 1 Criteria	Meets 2 Criteria	Meets 2 Criteria	Meets 2 Criteria	Meets 3 Criteria	
	Partner Assignment	Partner Assignment	Partner Assignment	Partner Assignment	

Disqualified Lead

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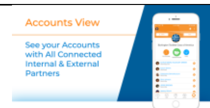
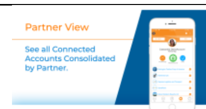
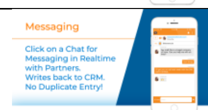
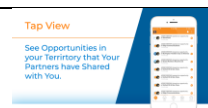
How to Sell With

VIEW	FUNCTION		IMPORTANCE
Accounts View	**Compare Your Accounts to Your Partners**		**7**
Partner View	**See all Your Partners**		**5**
Partner View - Mapped	**See all Connected Accounts consolidated by Partner**		**8**
Partner Engagement	**Daily Mobile communication REP – REP Saved to CRM**		**10+**
Key Opportunity Sharing	**Live REP to REP communications on the best Opp's**		**10+**
Partner Opportunity Sharing	**Live access to the Opp's your Partner is sharing with you**		**10+**

HOT TIPS				
Test with a selection of key Partners to identify adoption challenges to Account Mapping, survey your Partners HOW CAN WE IMPROVE THE PROCESS? Show Leadership with your Partners with transparency and accountability.	**Invite New Referal Partners**. Be on the look out for new potential partners in your Ecosystem.	Using Mobile enabled application send the new partner ONE piece of intel per day and you will get back one Lead per week.* This can be the SPARK that starts Field Rep engagement which is the Pulse of the Channel.	GIVE TO GET If you are not getting the engagement you expect. Try giving more intel, Support	Partners are Not Customers, they don't work for your company. They are very independent and have their own unique needs.
Your ICP (Ideal Customer Profile) may not be your Partners ideal ICP. Seek to understand your Partners business goals.	New Partner REP. Introduce yourself and send some intel	Ask your Partner: Do you need support for an intro, expanding footprint – High Level Contact, Info on our solution. Content/Sales Playbook?	Establish joint Metrics For Success. Weekly Monthly QBR	Prepare for Meetings. Draw out each Partners EcoSystem so you understand their business

			Align with your reporting cadence.	
Use partner Co- Selling rooms or Notes logged into CRM	#SLACK/Part-nerTap Check in Daily	ROI Goals: SAVE 20 Hours per week in Channel Management Time Accelerate time to clos-ing of Partner Deals	Elimination of spreadsheets and use of a Platform to provide a single place to access Partner Data re-quired to run the Channel. Query by attributes: region, account owner, in-dustry, hierarchy, segment, yearend, renewal date +++ to easily manage those Ac-counts with mul-tiple relationships.	FOCUS ON REP TO REP ENGAGEMENT

KPI – ARR/Accounts Mapped/Utilization Rate
Need to develop your KPI to meet Corporate Objectives and Maturity of your Organization

Lead Volume	Pipeline Units	Pipeline ARR	Closed $	Utilization Rate	Accounts Mapped	Intel Ex-changed

COLLABORATE

Engage	Trust	Share	
Rep – Rep Company to Partner	Data is exposed based on Trust	Leads/Accounts/Opps/Contacts	
Wireframe options	Options: CRM integration, Spreadsheet upload or comparison.		

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Manage Manual Spreadsheets
WEEKLY TO DO LIST

Pull all accounts out of CRM System where there are Partner Co-Sell activity. Ensure that Partner Technology is mapped.
Partner Alignment: Specific account ownership alignment and any other known information for **each partner.**
Contacts – all known contacts, who are responsive, where they are, update communication and who has been connected with, notes on what has been done with them, etc
Org charts – reporting and leadership hierarchy for each partner
Partner Shared Sheet – One sheet for each major partner. Needs to be updated on a weekly basis.
Ad hoc – Account Realignment. Hundreds of accounts reshuffled to new reps. All need to be updated in spreadsheets manually.

Daily Steps to retaining a high quality of data integrity to the Account Mapping Process

Monday - Run report of all newly created or closed /lost Leads and contact respective partners
Monday – Run report of new Opportunities created and notify respective partners
Tuesday – Update partner shared sheets with pipeline, active accounts, account access requests, etc
Friday – Update partner map
Friday – I receive a report from our major Partners of our website traffic from accounts where we have partners, check who the partner contact is and ask them to engage the prospect • Ad hoc – inside Seller comes to me requesting help with entry into an account. I find who we know within that account and set-up a meeting • Ad hoc – where we have events in specific regions, industries, etc, I engage partners with accounts in those regions to push out content relative to the event • Ad hoc – report to partner sales managers what I'm working on with the members of their team.
Basic Reporting Requirements Store all the data from Spreadsheets, update it easily and search it by any of its attributes (region, account owner, industry, hierarchy, segment, yearend, renewal date, etc)

Accelerate Account Mapping is a particular method of account mapping that is utilized in fast growing software companies who sell with their Channel Partners. Using requirements and solutions that evolve through collaboration between all the stakeholders in the Partner Ecosystem, creating cross functional teams including the customer.

This method advocates adaptive account planning, constant – live communication, open access to information and revenue acceleration greater than Quota, leading to the automation of the Account Mapping process and a reduction in time spent on manual processes. Think of it in the same way as you would Agile Development Methodology.

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There is significant anecdotal evidence that adopting Accelerate Account Mapping practices and values improves the performance of the Partner Channel, teams and organizations.

• Meet with Partners. Personal contact (e.g. via phone, instant message, live Web meetings) and Face to Face meetings are essential for maintaining communication and trust.
• Partner meetings focusing on QBR outcomes are vital. These meetings can keep peer teams from both organizations on track regarding planned deliverables.
These meetings are designed to keep both organizations aligned on the goals and status of the partnership, and should include key stakeholders, to formally review progress against the alliance business plan and make any necessary adjustments in strategy.

Account based Partnering Organizations Communication Wireframe

Schedule Partner Meeting			**Accelerate Method**
Meet with Partner F2F			Schedule Partner Meeting
			Meet with Partner F2F
Run Territory Report			See exactly which Accounts you have in common with your Partners
Exchange Reports	VS		Account matching visible by both parties from Mobile or Desktop
Print Territory Report			Live Query of Accounts and Reps and activities where matches Exist
Analyze Territory Report			Communicate AT THE REP Level via Mobile Application on specific Opp's, collect Deal Intel which gets written back to your CRM
Reconcile Report			Boost in all Lead and Partner Pipeline Metrics via online reporting
Schedule Partner Meeting			Schedule Partner Meeting to Review QBR/ Future Training and Co-Marketing based on Live Rep to Rep interaction
Manual Account Mapping Model			

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Outbound Focused Sales Organizations Partner Communication Wireframe

Import of Data into Spreadsheets			**Accelerate Method**
Weekly Spreadsheet manipulation	Vs		Scripted Import from disparate spreadsheets, CRM and other Sources into Partner Reporting Platform
Daily Spreadsheet manipulation			Prebuilt Reports available to Channel MGR + Partner
Manual Partner Communication			Query views to provide multiple relationships within a single account
Update Opp Contacts			Partner Facing Views : Internal Sales Facing Views
Update Org Charts			Relationships to the Rep Level
Partner Shared Sheets Clean Up			Territory Re-alignment Auto Mapped
Partner Updated Territory List			Email Automation provides delivery of Reports
Manual Account Mapping Model			Answers the Question Which Rep (Influence) owns what Account on the Inside and Partner Team

Early Stage Partner Relationships Communication Wireframe

Meet With New Partner			**Accelerate Method**
Channel Manager and Partner Identify 10 Accounts that they choose to start Sales Effort with. CM enters these into a Spreadsheet with necessary info.	VS		Meet with New Partner
Introduce Reps, circulate Spreadsheet, pull in AE's, clumsy – slow process.			Channel Manager and Partner Identify 10 Accounts that they choose to start Sales Effort with. CM enters these accounts into Platform, and shares with Partner
Follow-up by email, spreadsheets are circulated and attempt to keep current			Both parties can be updating Account Status, emails are tracked automatically, Notes are kept securely in the platform, Content MGT (Playbooks) are made available for Partner, associated training is available. All info is searchable.
Phone Calls			Speed to close is accelerated
Manual Account Mapping			More time for training and hands on education

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TRUST:
This is a process of working with your Partner to create an environment whereby they agree share account data. Use HOT TIPS to create Trust.

SHARE:

Partner Customers	Shared Customers	Partner Pipeline	ISV Pipeline	Co-Sell Opp's	Align Partners	Org Chart	

SUMMARY

This Playbook for Field Reps is a sub set of the P2P Partners Accelerate Method Account Mapping program. We intended to show and provide a playbook for Channel Managers to accelerate the revenues of their Channel by enabling Field Reps to sell better and leveraging their Partner counter parts.

We urge you to use these methods and move your organization into a POC with one or a few key Partners using the Technology described in this document.

Please let us know if you would like to investigate a POC with your Partners as this will allow you to test and verify the level of acceleration your organization can achieve.

Please reach out to us:

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