

Module I – Channel Program Assessment

Excerpt

Marketing and Branding Guideline Adherence

Determine if the channel partner has followed prescribed guidelines that the company has set forth with respect to marketing communications. Has the channel partner conformed to branding guidelines in the communications they have distributed? Have the processes been followed with respect to review and approval by the company of all communications prior to distribution?

Rules of Engagement Guideline Adherence

Assess whether the channel partner has followed the parameters for targeting prospective customers. Has there been a high incidence of complaints either from other channel partners, direct sales or customers/prospects with respect to channel conflict?

Lead Sourcing and Follow-up

Has the channel partner aggressively followed-up on leads provided?
Has the channel partner followed the process for sourcing and reporting leads?

Measurement and Reporting

Does the channel partner provide the required performance reporting as outlined in the channel program? Is the reporting timely and accurate?

Contract Status

For each existing channel partner, review the contractual status of the relationship. This will allow you to determine the options available when you prepare recommendations for the future of the partnership. The main document to review is the existing channel partner agreement or contract. Analyze the following contract clauses to determine relationship status:

Prepare Recommendation on Final Disposition of Each Partner Relationship

Now that you have completed your assessment of an existing partner relationship, you are ready to prepare a recommendation for the final disposition of the relationship (utilize the Channel Partner Assessment Checklist at the end of this module as supporting documentation for your recommendation). There are five categories in determining what actions should be taken with respect to each partner.