













Community Cloud Partner Relationship Management (PRM) Canvas

HOW TO USE THIS CANVAS

Inspired by the Business Model Canvas, we've developed this tool to help Partner Digital Engagement Managers plan their ongoing management of their Digital Engagement Platform. This canvas is divided into two sections: Section 1 contains some questions you should think about for each element, Section 2 is a blank canvas for you to complete. For any questions contact ccastro@salesforce.com.

 <h3>Set Goals for Your Channel Program</h3> <ul style="list-style-type: none"> * Align channel program goals to business goals. * Which business goals be supported directly (and indirectly) by the channel? * Set goals relative to the stage of your partner program. 	 <h3>Set Goals for Your Channel Partners</h3> <ul style="list-style-type: none"> * Adjust goals to reflect partner's capacity to sell your solution * Include behavior and results-driven metrics * Make an objective estimate of your company's overall sales maturity, this can impact partner results 	 <h3>Identify Use Cases</h3> <ul style="list-style-type: none"> * Define a full set of use cases * What business processes are important? * Define impact to business (L/M/H) * Define ease of launching these use cases * Prioritize (what is the crawl/walk/run strategy?)
 <h3>Define the Purpose of Your Program</h3> <ul style="list-style-type: none"> * Develop a <u>Shared Purpose</u> statement for your partner program * Move from what you can do <u>TO</u> or <u>FOR</u> your partner to what you can do <u>WITH</u> your partner. * What's in it for the partner? How will you help them succeed? 	 <h3>Develop Key Personas / Journeys</h3> <ul style="list-style-type: none"> * Who is this portal for? Start with 2-3 key roles & define them. * What value will it bring to these roles? * Develop list of touchpoints for each persona. * Map touchpoints across a user journey, validate with a few partners. 	
 <h3>Resources / Staffing</h3> <ul style="list-style-type: none"> * Who will manage the portal? * Think of the role as a Partner Digital Engagement Manager. * Find individuals within channel sales organization to manage portal. * This role is critical to success of PRM Portal 	 <h3>Establish Executive Sponsorship</h3> <ul style="list-style-type: none"> * Executive sponsorship is important to show commitment * Define specific events/opptys for executive participation (mtgs, etc.) * Develop communication/awareness plan & provide regular updates * Can go a long way in establishing trust with partners 	
 <h3>Recruit and Onboard</h3> <p>Partner Recruitment</p> <ul style="list-style-type: none"> * Think along partner types to recruit: (a) sales reach, (b) delivery / implementation, and (c) partners for solutions, support, and maintenance. * Be sure to have an inbound recruitment option (i.e. via website) <p>Partner Onboarding/Training</p> <ul style="list-style-type: none"> * Focus on hands-on training as much as traditional instruction * Provide ample self-service options * Reinforce with certifications <p>Adoption</p> <ul style="list-style-type: none"> * Create channel performance levels for partners to attain * Motivate with deal protection, incentives, better margins, and support * Provide charts/dashboards/reporting to track progress 	 <h3>Manage and Grow</h3> <p>Deal Registration:</p> <ul style="list-style-type: none"> * Communicate clear and fair rules of engagement * Create an efficient process with workflows and fast approvals * Establish service level agreements (SLAs) <p>Lead Distribution</p> <ul style="list-style-type: none"> * Define criteria to assign leads to the right partners * Decide on the lead stages you want to track and measure * Establish service level agreements (SLAs) <p>Market Development Funds (MDF)</p> <ul style="list-style-type: none"> * Have an internal process defined with clear stakeholders * Allocate funds strategically (new product launch, new market, etc) * Provide pre-packaged Marketing Campaigns 	
 <h3>Promotion Plan</h3> <ul style="list-style-type: none"> * Focus on continuous promotion/awareness * Make some PRM portal content public * Promote inside your company as well * Use existing promotion channels (email, etc) * Evaluate opportunities in social media/digital 	 <h3>Establish Important Metrics</h3> <ul style="list-style-type: none"> * Focus on both leading and lagging metrics * Leading metrics are behavior-driven (#deals registered, #webinars, #trials, #events, etc) * Lagging metrics are results-driven (#deals won, revenue, growth rate, #new logos, etc) 	 <h3>Develop Internal Reporting Plan</h3> <ul style="list-style-type: none"> * Don't overdo it with data, share stories * Align metrics to KPIs/business goals * Set up your own partner scorecard * Tie data to use cases (Deal Registration, Lead Distribution, MDF, Training, Onboarding, etc)

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Develop Key Personas / Journeys



Resources / Staffing



Establish Executive Sponsorship



Recruit and Onboard



Manage and Grow



Promotion Plan



Establish Important Metrics



Develop Internal Reporting Plan