



## Introducing the SiriusDecisions Partner Onboarding Framework

A formally structured, comprehensive onboarding process is the key to minimizing partner ramp-up time and maximizing ongoing partner engagement and productivity

Inadequate onboarding of new channel partners can cause these relationships to fail before they have a chance to become productive

The SiriusDecisions Partner Onboarding Framework lists activities and deliverables that can be adapted and enhanced to fit most partner and product types

According to U.S. News and World Report, as many as one-third of college students drop out during their first year. Some universities are doing what they can to remedy this. They are encouraging freshman to move in a week earlier than other students to engage in meet-and-greet activities, tour the campus and get trained on how to access important resources.

A standardized onboarding process is a critical component of building successful relationships with new channel partners. Most partners already handle more than eight product lines, and if the supplier fails to get new partners enabled and actively selling during the 90 to 120 days after they are recruited, the partnership is likely to fail. In this brief, we describe the tasks and deliverables contained within the four stages of the SiriusDecisions Partner Onboarding Framework, along with five key enablers of successful partner onboarding.

### Stage One: Align

The onboarding process starts during the partner recruitment process. Before partners and suppliers sign a partner agreement, a mutual understanding must be reached about the expectations of the partnership. Both parties must reach a clear agreement on how they can work to create value for customers. This goes a long way toward ensuring a positive partner experience.

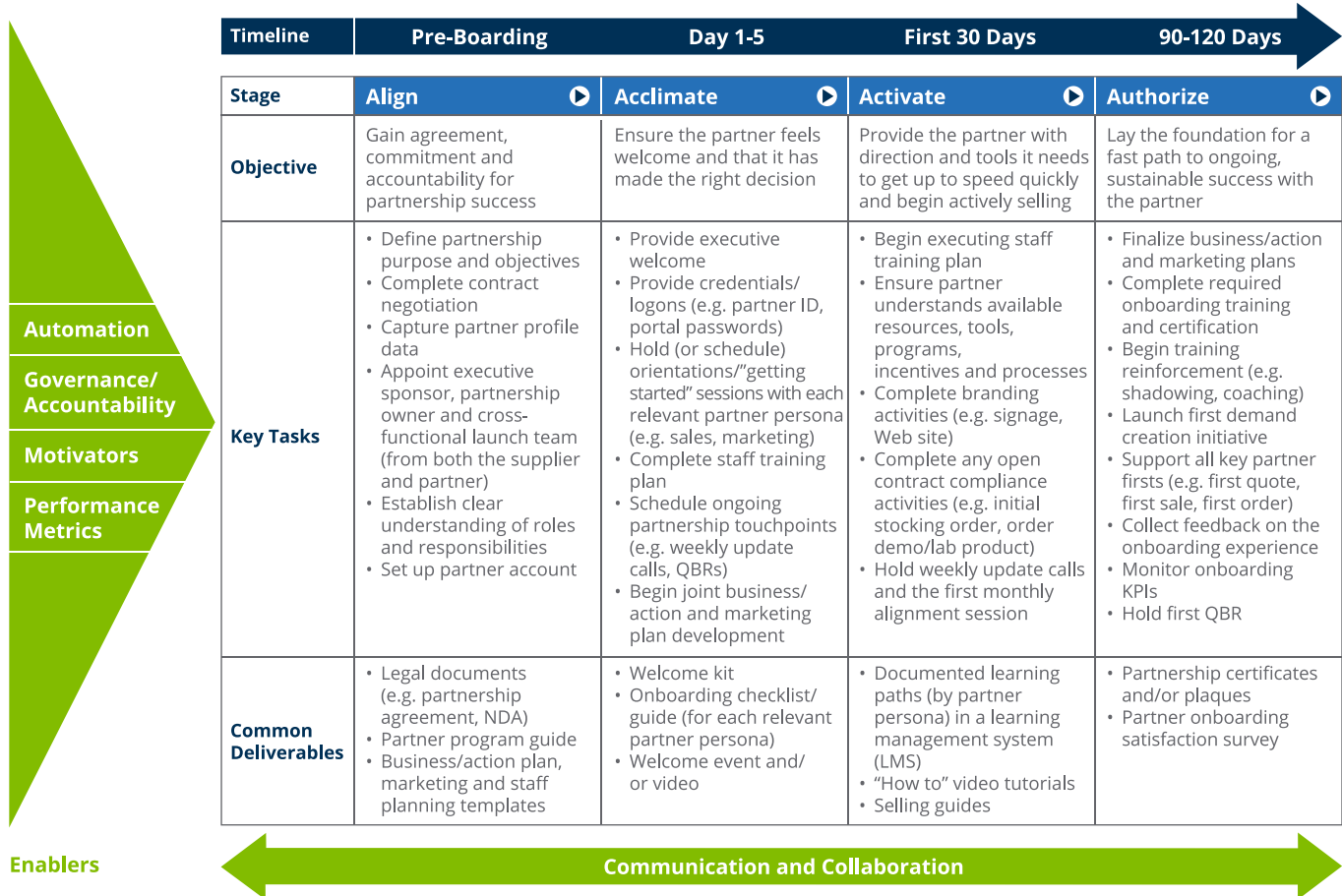
Suppliers should communicate any partner requirements that involve the investment of time or money in order to avoid any surprises for the partner. Additionally, both parties should identify the points of contact within the partner and supplier organizations and ensure that these individuals are committed to launching the partnership and building the joint business/action plan.

### Stage Two: Acclimate

Partners sometimes experience something akin to buyer's remorse – they regret entering the partnership and may disengage with a new supplier before the work even begins. To avoid this situation, suppliers should communicate with partners to reinforce that they made the right decision. Take steps to make the partner feels welcome and appreciated from day one.

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## The SiriusDecisions Partner Onboarding Framework



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The specific steps to take depend on the size of the supplier and the potential impact of the new partner. Common tactics include a high-ranking supplier executive making a personal call – or at least sending a formal letter – to the top partner executive. This demonstrates to the partner that commitment to the partnership starts at the top of the supplier organization. Suppliers also may consider sending a welcome kit that presents the supplier’s offering and the partner program in a compelling and interesting way in order to get the new partner’s entire organization excited about the opportunity.

### Stage Three: Activate

Training and enabling partners is one of the most important objectives of onboarding. This is the time to expose the

partner to the supplier’s offering, support resources and programs. These details help emphasize how the partnership can drive revenue growth. Key partner personas should complete this stage with a clear understanding of how they can contribute to a successful, profitable partnership.

- **Sales and sales engineering.** Suppliers should provide partner sales reps with a broad view of the portfolio to show how the relevant offerings deliver revenue. This enables reps to sell more effectively and can drive enrollment in more in-depth sales courses.
- **Marketing.** Partner marketing teams should be introduced to the supplier’s marketing resources and assets. They should learn how to gain financial support for relevant



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marketing programs, if applicable. This support ensures that they are adequately prepared to build a joint marketing plan with the supplier.

- **Service and support.** The post-sales support organization should become familiar with the courses required to become service-authorized, as well as any post-sale policies (e.g. the supplier's standard warranty policies and the partner's role in warranty support).
- **Operations.** Operations should be exposed to key processes and tools relevant to the partnership – e.g. how to design, quote and place an order.

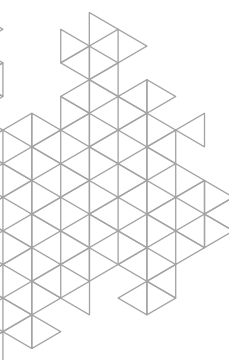
## Stage Four: Authorize

By the end of the last stage in the onboarding process, a new partner should have acquired the knowledge, skills and behaviors needed to profitably market and sell the supplier's offering.

To maintain momentum and build a sustainable long-term partnership, suppliers should ensure that all of the partner's major first actions (e.g. first sales calls, first marketing tactics) have a positive outcome and that it begins seeing signs of future success. Suppliers should make joint sales calls to the installed base and help partners launch their first demand creation campaign. For more complex products, this also means accompanying partners on their first installation to ensure that the end user is satisfied.

## Process Enablers

To ensure the onboarding process meets its desired objectives, suppliers and partners should understand how each of the following enablers impacts the process.

- **Automation.** One of the keys to maintaining partner mindshare is being easy to do business with. Therefore, the entire onboarding process must be streamlined for speed, efficiency and accuracy. Use service-level agreements along with the task management capabilities of a sales force automation or partner relationship management platform to automate and track the onboarding of new partners.
  - **Governance and accountability.** While it is important to have multiple subject-matter experts involved in the onboarding process – including its design and implementation – one individual should own, lead and be held accountable for its success.
  - **Motivators.** Incentives are a proven way to drive partner engagement and accelerate a new partner's ramp-up time. However, the success of an onboarding process also is based on the level of internal motivators. Initially,
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new partners do not produce revenue. Unfortunately, this often results in the partner account manager viewing onboarding as someone else's responsibility. Unless there is a dedicated onboarding team, a supplier's reward system must hold the partner account manager accountable for the success of the new partner's onboarding experience from day one.

- **Performance metrics.** To gauge the success of the onboarding process and make any required improvements, suppliers should establish and track key performance metrics (e.g. time to first sale, number of employees certified). They should also elicit participant feedback, not only to identify areas of improvement, but also to watch for early signs of partner dissatisfaction so immediate actions can be taken to address any problems.
- **Communication and collaboration.** Partner organizations need to manage an overwhelming amount of messaging on a regular basis. A defined communication strategy ensures that the right messaging and content gets to the right people at the right time and with the right cadence. It is just as important that the communication be two-way; partners need to feel that suppliers listen to and respect them.

## The Sirius Decision

During the onboarding process, the supplier's expectations and priorities should not be centered on information sharing and establishing a strong relationship, not on immediate sales. For more complex offerings, a one-off sale during this process may actually be a warning sign that warrants further investigation. If an early deal is not coupled with engagement in training and creating demand, the partner may have engaged simply to close this opportunistic deal, with little intent of developing a long-term relationship. For this reason, a partner should never be viewed as fully onboarded and ramped up until it completes its second sale.

