

# Getting Smart About Applying AI in B2B Channels



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Chief Strategy  
Officer



## Our vision.

Fully integrated solutions, services & expertise to drive channel success

# Channel Data is Kept in Different Silos

Partner  
Relationship  
Management

PRM

Channel  
Marketing and  
Management

CMM

Learning  
Management  
Systems

LMS

Configure,  
Price and  
Quote

CPQ

Channel  
Data  
Management

CDM

Lead  
Distribution  
Management

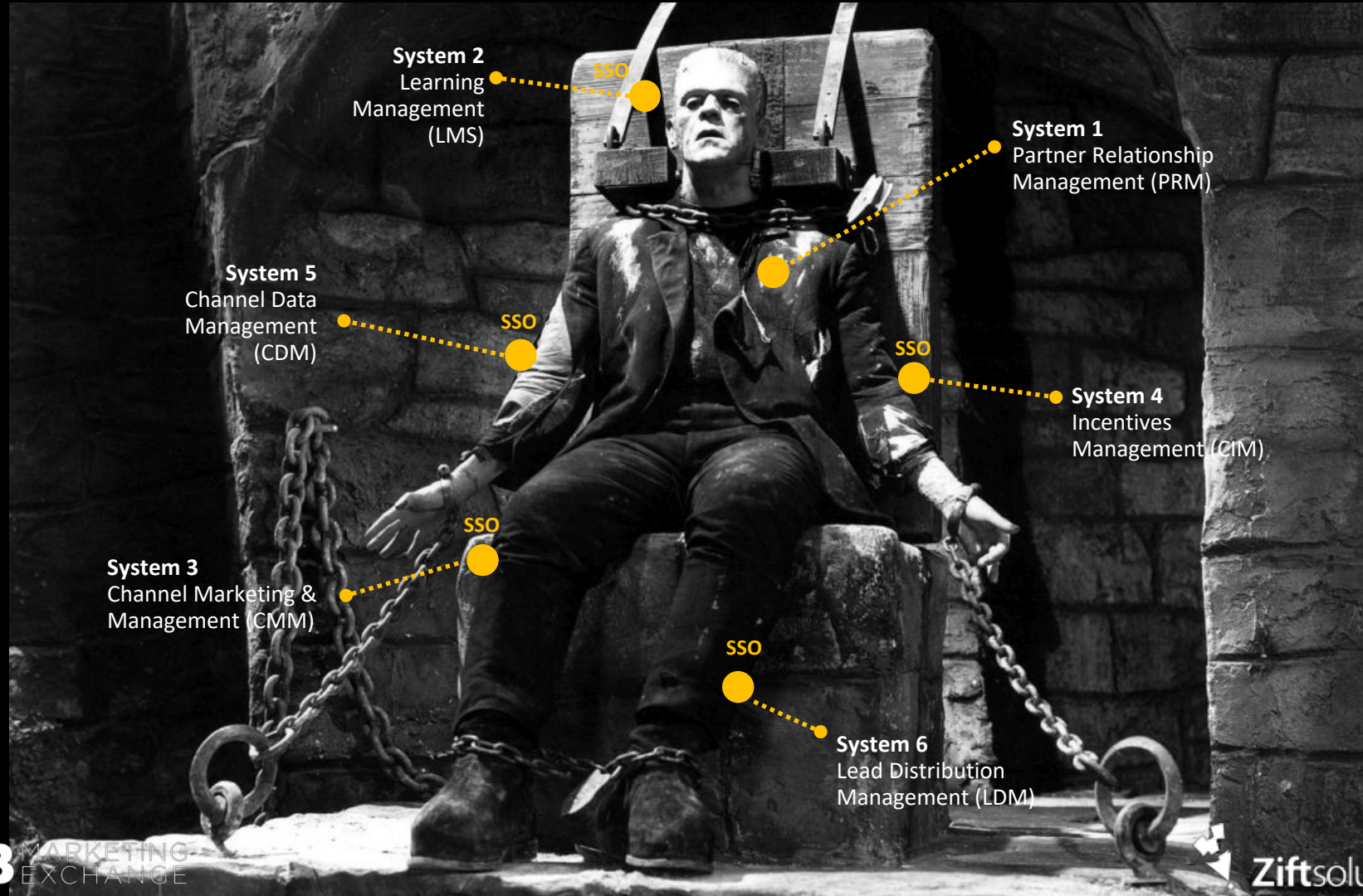
LDM

Channel  
Incentives  
Management

CIM

# Partner Tech Frankenstein





**System 2**  
Learning  
Management  
(LMS)

**System 1**  
Partner Relationship  
Management (PRM)

**System 5**  
Channel Data  
Management  
(CDM)

**System 4**  
Incentives  
Management (CIM)

**System 3**  
Channel Marketing &  
Management (CMM)

**System 6**  
Lead Distribution  
Management (LDM)



# Zift's View of the Channel...



# What's Possible Today with Channel Data?



## Metrics & KPI's



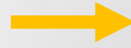
Leading and lagging metrics that can show early indicators and finish-line results

## Data-Driven Decision-Making



Dashboards and reports that can spot trends, e.g. partner engagement

## Predictive Modeling



Best-fit scenarios, gauges propensity, e.g. partner/customer/offering



# What's Different About AI / Machine Learning?



**Metrics & KPI's**

**Data-Driven  
Decision-Making**

**Predictive  
Modeling**

**VS**

**Cross-functional metrics that can show relationships, e.g. what impact is training having on pipeline?**

**Which campaigns are most effective and which partners should I target next?**

**Which opportunities will close if we executed the next set of activities?**

# Assessing Supplier Data Capabilities

# Using the Zift Assessment to Uncover How Suppliers are Employing Data

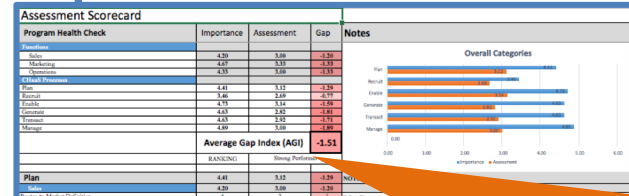
## Areas of Strengths & Opportunity

Our customers take the assessment and describe priorities and capabilities

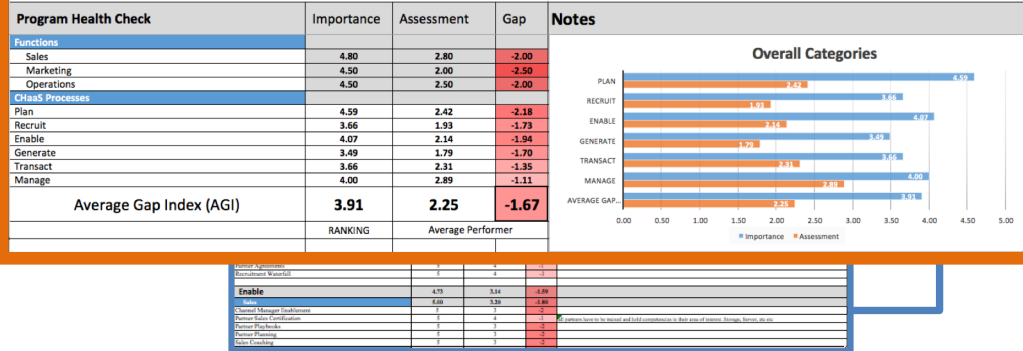
They identify gaps or areas of improvement using the Scorecard

They receive a prescriptive Executive Summary to help prioritize initiatives and uncover gaps

### Scorecard



### Assessment Scorecard



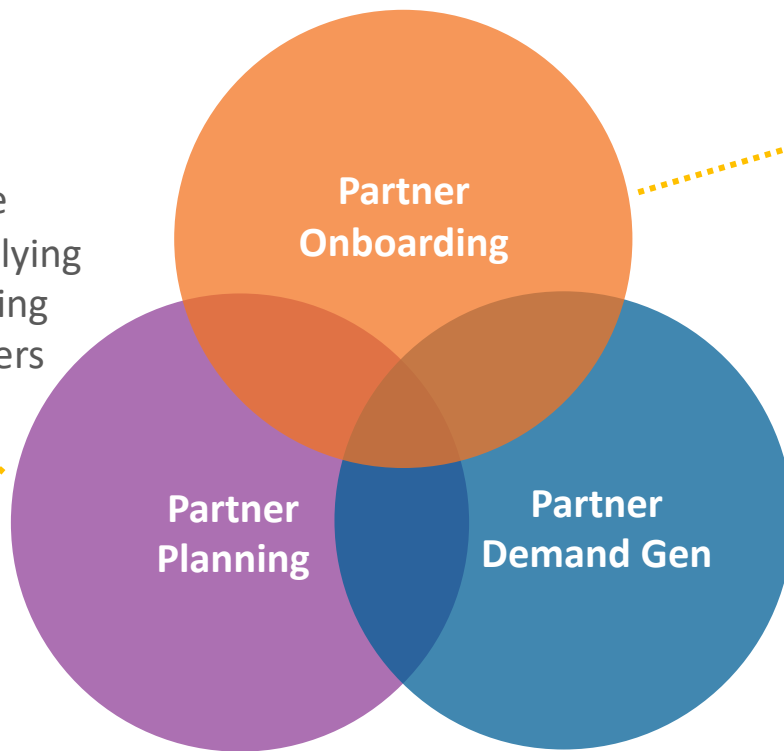
Assessment Scorecard and  
Executive Summary



# Where Do AI And Channel Programs Intersect?

## Best Practices

Learning what is working for some partners and applying that to the planning process with others



## Enablement to Execution

Taking specific steps to ensure the likelihood of partner success

## Marketing Effectiveness

Which campaigns have the highest impact on pipeline opportunities



# Results from the Zift Program Assessment

While aspirations are high, many channel suppliers still have a long way to go before they can look beyond finish line results



## What did we see?

Suppliers lack the right mix of leading and lagging metrics

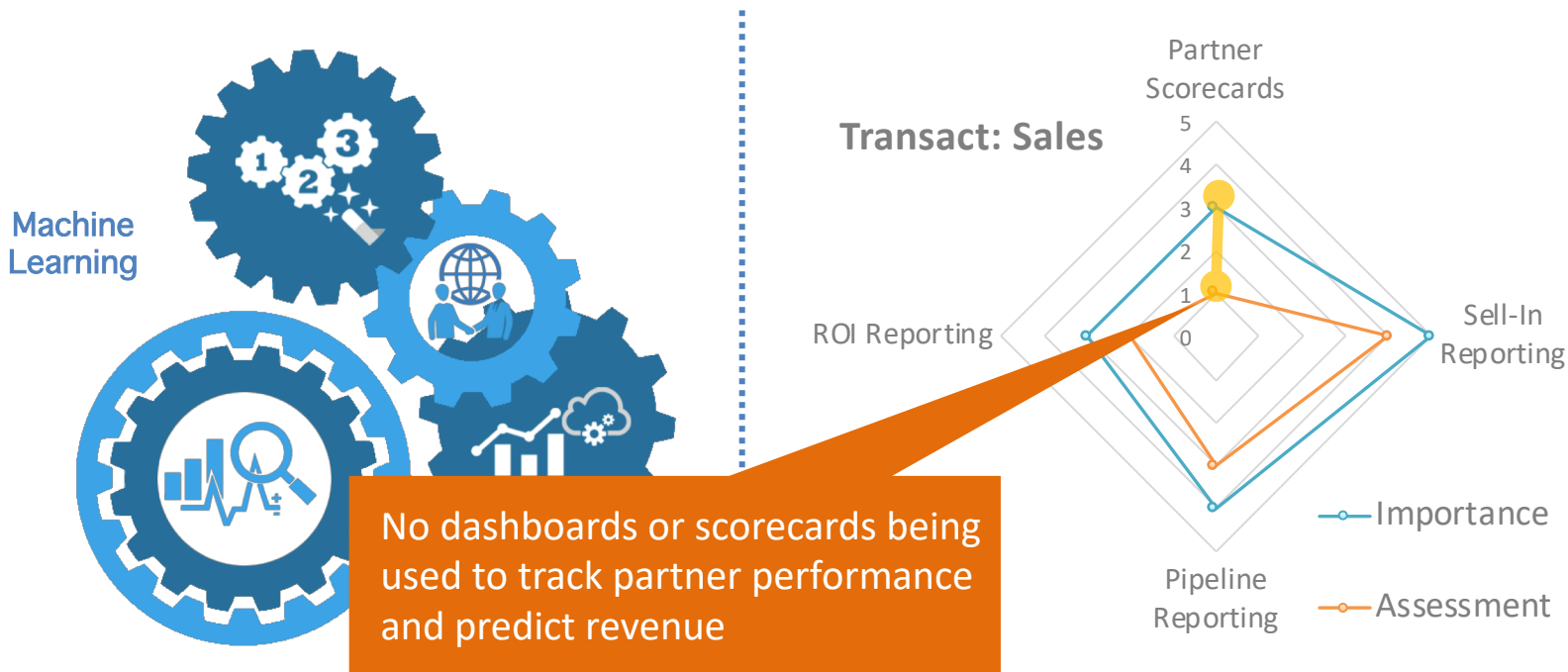
Static data and finish line results aren't helping

Most reporting is on partner activity or engagement with little hope of closed-loop reporting

Without an integrated technology stack, this is impossible

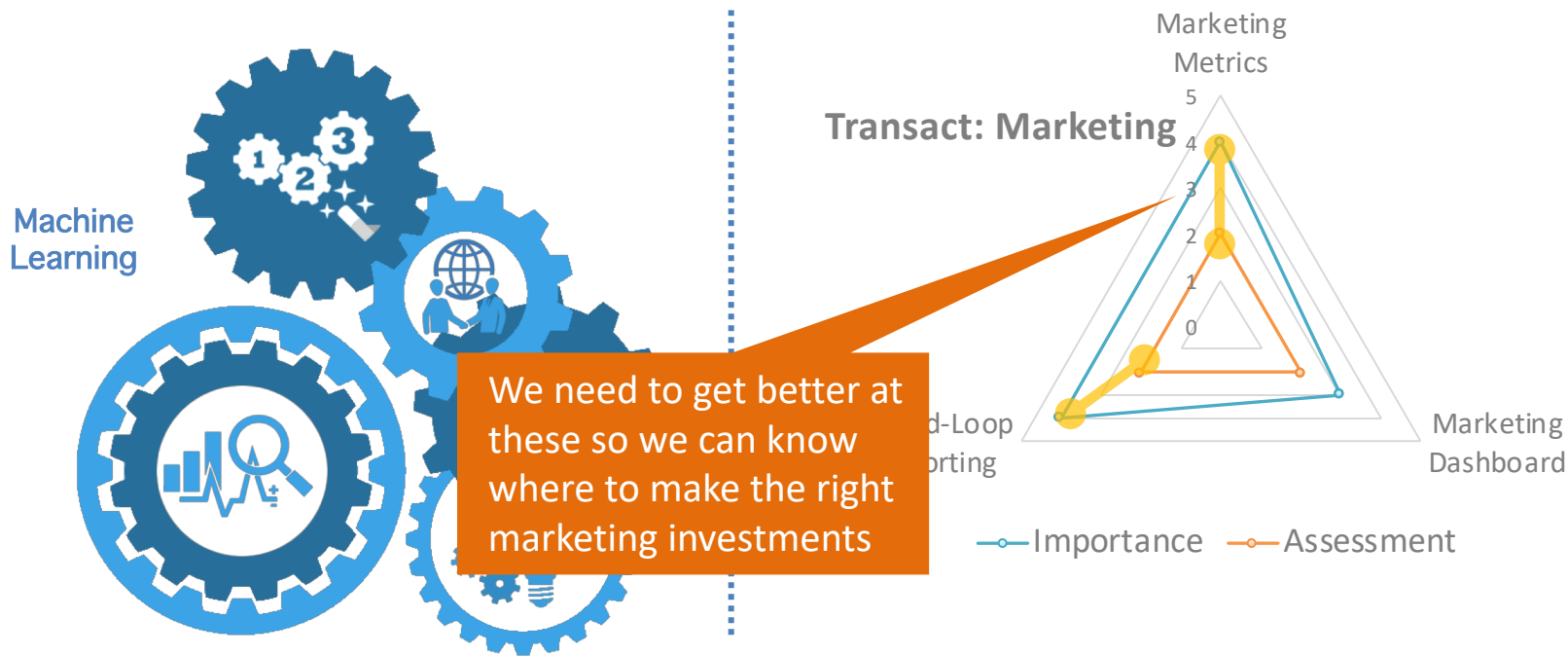
# Measurement Priority: Pipeline First Approach

Most Suppliers have visibility into partner pipelines but there are gaps in their ability to develop scorecards that can be predictive



# Where is the Next One (Opportunity) Coming From?

Machine learning can tell suppliers where to invest resources next to drive the highest probability to close business



# AI / Machine Learning

## Example: Driving Demand Creation Effectiveness



# Machine Learning Examples: Opportunities




Which opportunities should partners work on?

~~Deals they know will close~~

Deals they know less about

~~Deals that will never close or take longer~~

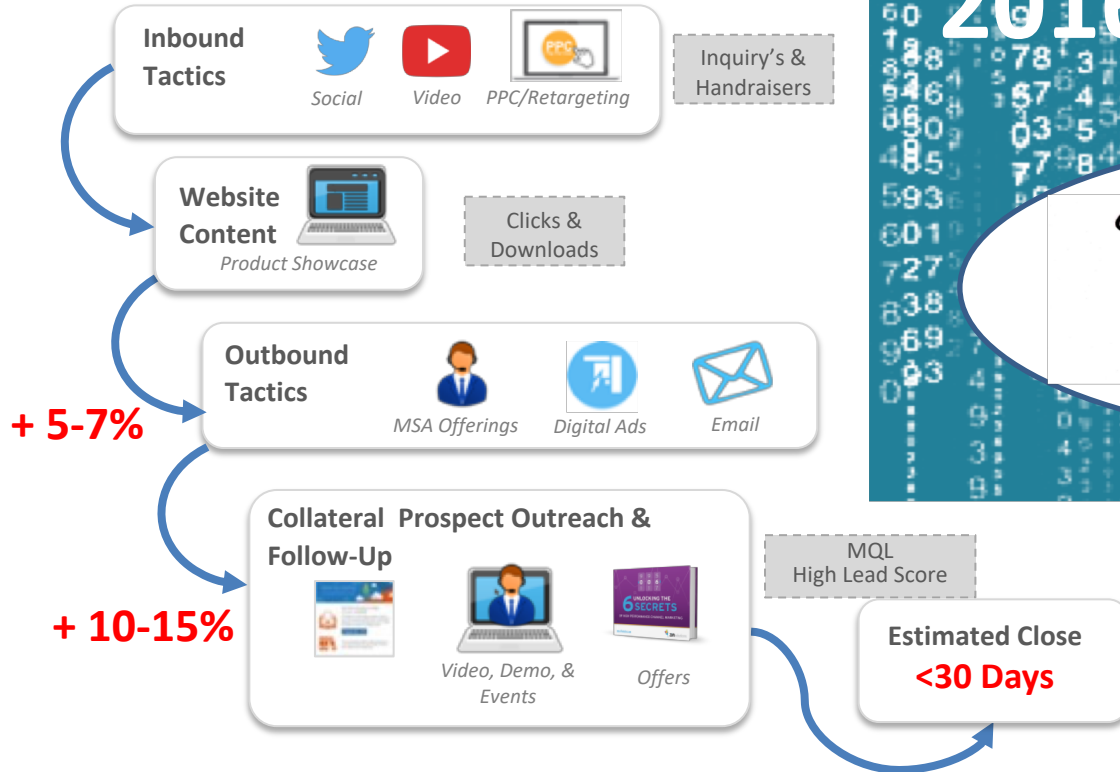
# Machine Learning: Detecting Patterns in Opportunities



<u>Closing Period</u>	<u>%Chance of Closing</u>	<u>Business Partner</u>
Q3	90%	ASI
Q3	90%	ECCOM
Q3	75%	SIGMA
Q4	75%	LUMINATE
Q4	60%	AVANDE
Q1	20%	ASI
Q1	20%	SOLDATA
Q1	10%	NEXUS

# Machine Learning: Detecting Patterns in Opportunities

## The Integrated Marketing Journey



2016 2017 2018

Q3	75%	SIGMA
Q4	75%	LUMINATE
Q4	60%	AVANDE

# Enable Partners with Relevant Insights into Marketing Data

Website Analytics Report

Tamco Shared Analytics via bounce.zift123.com to me

11:05 PM (15 hours ago)

## Website Analytics Report

Analysis of website visitors from 6/23/14 2:59 AM to 6/24/14 3:05 AM

There were 177 web page views from 23 unique visitors in 18 companies, [view details](#).

### COMPANIES

Samsung SDS America		1 visitors, 12 page views - <a href="#">details</a>
Pages Visited	<a href="http://www.AcmePartnerCo.com/products/TamcoSecurity/">http://www.AcmePartnerCo.com/products/TamcoSecurity/</a> <a href="http://www.AcmePartnerCo.com/solutions/">http://www.AcmePartnerCo.com/solutions/</a> <a href="http://www.AcmePartnerCo.com/products/">http://www.AcmePartnerCo.com/products/</a> <a href="http://www.AcmePartnerCo.com/">http://www.AcmePartnerCo.com/</a>	
Tamco Pages Visited	<a href="http://www.tamco.com/products/security/">http://www.tamco.com/products/security/</a> <a href="http://www.tamco.com/solutions/">http://www.tamco.com/solutions/</a> <a href="http://www.tamco.com/products/">http://www.tamco.com/products/</a> <a href="http://www.tamco.com/">http://www.tamco.com/</a> White Paper Download [The Tamco Advantage]	

Bankers Life and Casualty		2 visitors, 17 page views - <a href="#">details</a>
Demographics	50,000 Employees	
Pages Visited	<a href="http://www.AcmePartnerCo.com/products/TamcoVirtualization/">http://www.AcmePartnerCo.com/products/TamcoVirtualization/</a> <a href="http://www.AcmePartnerCo.com/get-started/">http://www.AcmePartnerCo.com/get-started/</a>	



# What Can Machine Learning Tell Us About Partner Enablement?

# Assessing Supplier Training Capabilities

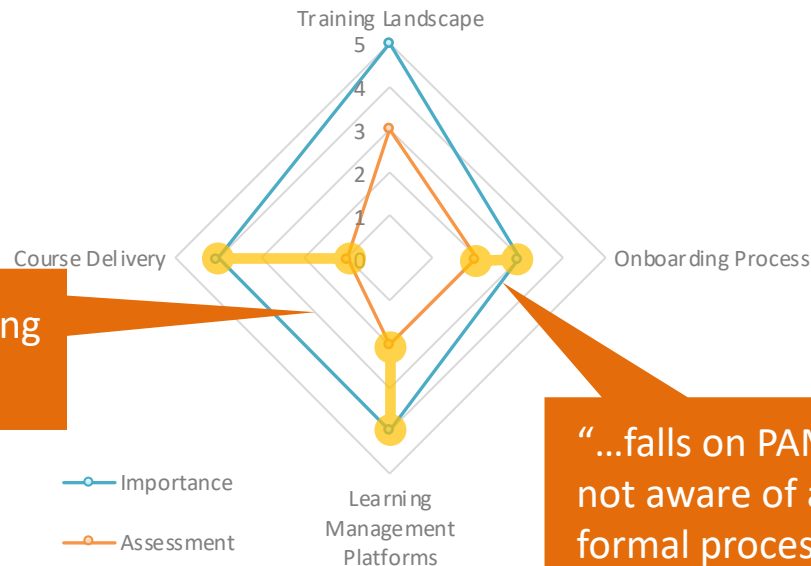
Mainly suppliers rely on corporate LMS systems to create courses, but many lack training management tools that can tie back to program benefits



No scalable learning via automation

What did we see?

Enable: Operations



“...falls on PAMs, not aware of a formal process”

## Machine Learning Examples



What impact is learning  
having on productivity?

- How effective are we onboarding partners?
- How can we decrease time to Revenue
- **Which learning paths are having the greatest impact on productivity?**



# Determining the Shortest Learning Path to Productivity



## Partner Learning Paths

Product

1

2

3

4

5

3 weeks

Marketing

1

2

3

2 weeks

Sales

1

2

1 week

# Determining the Shortest Learning Path to Productivity





# Determining the Shortest Learning Path to Productivity

PARTNER	DAYS	REV\$	LMS TRAINING COURSES TAKEN									
			P1	P2	P3	P4	P5	M1	M2	M3	S1	S2
DATALINK CORP.											X	X
EPLUS INC.												
DATALINK CORP.												
INTERVISION SYSTEMS												
SIRIUS COMPUTER SYSTEMS												
PRESIDIO NETWORKS												
INTEGRATED ARCHITECTURE												

### SHORTEST LEARNING PATH TO REVENUE IS:

- Integrated Marketing Plays

```
graph LR; P1((P1)) --> P5((P5)); P5 --> M1((M1)); M1 --> S1((S1)); S1 --> S2((S2));
```

- Product 101
- Configuration Options
- Social Selling
- Solution Selling

## SHORTEST LEARNING PATH TO REVENUE IS:

- Integrated Marketing Plays



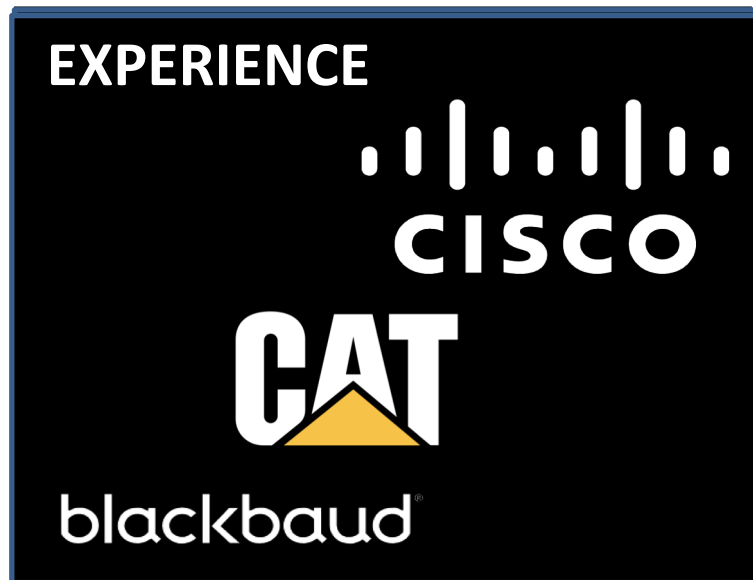
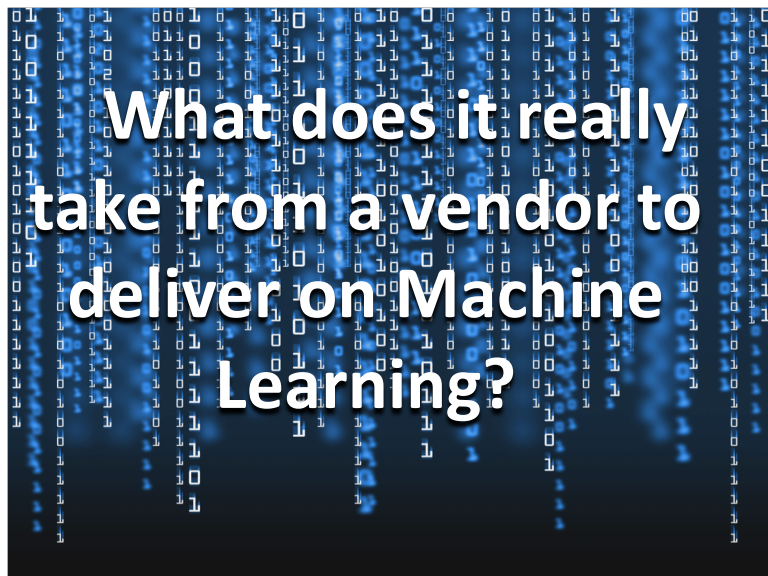
- Product 101
- Configuration Options

- Social Selling
- Solution Selling

# Getting Started with Channel Data

# What Are the Table Stakes for Channel Tech Vendors?

The bar is high for vendors entering the channel data / machine learning game; it takes years of accumulating data and expertise to make a lasting impact.



# Getting Started with Machine Learning in Demand Generation

Channel sales and marketers can use advanced reporting to predict the right partner-product-customer combination to drive better performance

## GREATEST AREA OF IMPACT

- Campaign Effectiveness
- Engaged partners
- Top line revenue
- Total Cost of Channel

Zift**DATA**

Zift**Concierge**

Channel Success  
Team

Channel  
Assessment

Advanced  
Reporting

# Getting Started Using Machine Learning with Partner Enablement

Provide the partner with the direction and tools they need to get up to speed quickly and actively building pipeline.

## PRE-REQUISITES FOR SUCCESS

PAM  
Enablement

- Established formal training programs using scorecards, assessment models for partners

## GREATEST AREA OF IMPACT

- Poor Engagement in other activities, e.g. Marketing
- Poor pipeline conversion
- Slower than usual deal frequency

### Readiness

ZiftLearning

ZiftAcademy

Zift Platform Overviews

CCoE Webcasts

OnDemand Courses



# What Steps Can You Take to Accelerate Channel Data in Decision-Making?



**Break the  
Data Silos.**

**Employ Partner  
Scorecards.**

**Close the Loop  
on Data.**



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