

SoftLetter & Chanimal.com Present...

# How to Build a Successful SaaS Reseller Channel

*The most comprehensive full-day channel workshop ever!*

NEW! Includes  
Certified Channel Manager  
e-learning review, test & certificate

SaaS University Workshops  
Austin Marriott South  
4415 South IH-35  
Austin, TX 78744

May 15, 2014, 8:00—4:30 pm



## Your Workshop Trainer

Ted Finch, President and CEO  
Chanimal, Inc.

## Testimonials

"Ted Finch has proven to be **one of the best channel marketing professionals in the industry.**" CEO, ScratchOut

"Ted Finch is **one of high-tech's most knowledgeable and effective channel specialists.** Unlike many so called experts, Ted has worked extensively as a top executive in the software and hardware business with resellers. His extensive knowledge of how companies can best leverage channel partners is thus based on hands-on and hard won personal experience." Rick Chapman, Managing Editor and Publisher of Softletter.

Without Ted Finch, the 'Chanimal,' **I would not have known where to start our reseller program.** Having such incredible guidance and insight into the professional reseller world enabled our Company to flourish in the mid-market." Theresa, Partner Program Manager, Alpha Software

"His ability to provide **a detailed path to each project goal with the associated tasks is remarkable.** His 25+ years of marketing experience is evident from the first conversation." Steve Grushcow, CEO, Edit.com

"Ted helped us get our VAR recruitment program off the ground, correcting key misconceptions and deficiencies along the way. **Easy to work with and informative.**" Adam Scran, CEO, Ascentive

## Should You Attend This Workshop?

- Are you trying to create a SaaS reseller program?
- Already have one, but it is not working as well as expected?
- Don't know what reseller partners value in a partner program?
- Wish you understood how to recruit the best partners?
- Need to know how to jumpstart and maximize partner sales once they come on board?

Then you need to attend the SoftLetter SaaS Channel Management Seminar, **the most comprehensive full-day seminar ever** on defining, creating, recruiting and managing a world-class B2B, Enterprise or SaaS channel program! Hardware, Software or SaaS—it's all covered.

## This Course is Perfect For...

Anyone that needs to understand the channel and/or build and manage it, including: new or existing CEO's, Presidents, GM's, Managing Directors, and all Managers of sales, marketing, channel management, alliances, account management, or business development. Great if you are new or a seasoned pro in the channel—get certified.

## About Your Instructor

This exciting course is lead by Ted Finch, aka Chanimal (short for Channel Animal), one of the top channel experts in the entire high-tech industry, having launched over 500 products into the channel for over 200 vendors (including Microsoft, HP, Adobe, Corel, Intel, Aldus, Epson, AOL, WordPerfect, Novel, Autodesk, Citrix, IBM, Sony, Disney, Mitsubishi, Lotus, DCA, Netscape, plus over 75 start-ups or re-boots with desktop, consumer, enterprise and SaaS products).

Mr. Finch is a former VP of Sales and Marketing with TAC (now called MarketStar), a VP at Goldmine Software, VP at Harcourt, Sr. VP at Motorola, VP at GE, and CEO of Chanimal.com. In addition, he helped form Red Storm Entertainment with Tom Clancy, and led the marketing team that published AOL and Netscape Navigator, the #1 best-selling software in the world at the time.

Mr. Finch sits on the board of advisors of several high-tech start-ups, at SaaS MAX, on the Channel Advisory Council, with SoftwareCEO (CompTIA), has spoken at dozens of industry conferences, and has been quoted by over 100 sources including PC Magazine, Retail Week, CNN, Computer Reseller News, Entrepreneur Magazine, Business Week, Channel Advocate, Newsweek, & Fortune.

## Course Outline

This is not another theoretical, boring monolog on channel management. Instead, it is a high energy, practical, hands-on and comprehensive training course showing you exactly how to create a world-class channel program (from scratch, or by refining an existing program) – the same kind of program utilized by many of the world's most successful channel companies. Your instructor has a dynamic presentation style (he is *not* boring), with lots of hands on involvement and dozens of practical examples throughout. He also runs the industry's only **Certified Channel Manager** program (this is part of the certification program included free!).

All attendees will get a workbook, plus a CD containing templates, agreements, and samples of everything covered, including the Channel Plan of Action.

## Workshop Agenda

Following is the workshop agenda:

### Orientation 8:00 – 8:30

Sign-in, get seat, name tags, materials, etc.

### Session One 8:30 – 9:30

#### Channel Management Defined (level-set entire group)

- How the direct and indirect reseller channel works
- The reseller continuum and definitions (distributor, partner, MDF, co-op, etc.)
- Which channel to use for your product
- Transitioning from direct to channel
- Minimizing channel conflict
- Roles of channel sales and channel marketing (with org chart/job descriptions)
- Aligning compensation with objectives – samples
- Roll-out phases and typical timelines

### Session Two 9:30 – 10:20

#### Phase One – Defining (or re-defining) a Channel Program

- What resellers look for when selecting a vendor partner
- Elements of an effective world-class program
- Evaluate your current channel program (if available) against best practices
- Competitors channel program (competitive matrix)
- Reseller profiles (type determines features)
- Reseller levels – when applicable and why
- SaaS and wholesale distributors
- Requirements (application, license, training, certification, support)
- Margins and expectations (SaaS differences)

### Session Three 10:30 – 11:30

#### Phase One – Program Setup (deliverables)

- Differences: affiliate, VARs, System Integrators, unique to SaaS
- Reseller portal & PRM's
- Reseller application – information to capture (profiling)
- Reseller agreements – key elements
- Product sales tools (kits and templates)
- Training and Support
- Lead generation, lead policies
- Sales assistance
- Deal registration
- The critical first 90 Days

### Networking Luncheon 11:30 – 12:30

### Session Four 12:30 – 1:30

#### Phase Two – Recruiting a Channel (strategy)

- Decisions – do it yourself or outsource?
- Differences by country and regional
- Two tier versus one tier distribution
- Navigating distribution agreements
- Refining the reseller profile
- Best sources to find resellers
- Guerilla/Chanimal approaches to recruiting
- Competitors & Alliances
- Recruiting – what really works
- Alternate channels - affiliates

### Session Five 1:30 – 1:50

#### Phase Two – Recruiting Tactics

- Database & PRM's
- Software to capture names
- Direct response format (e-mails, postcards)
- Persuasive Format
- Phone Dialogues
- Roadshows (alliances)
- Advertising (VAR Business, etc.)

### Session Six 2:00 – 3:00

#### Phase Three – Enablement (initiating sales)

- Differences by channel type
- A well-positioned product
- The all powerful “Recommendation Rate”
- NFR (access for a SaaS product)
- 4 P Orientation (product, portal, plan, process)
- Reseller training
- Certification programs
- Regular communications & promotions (leads)

### Session Seven 3:00 – 3:50

#### Channel Management – Ongoing motivation

- Three phases of a new reseller
- Creating loyalty within the channel
- What works – spiffs, rebates, contest, NFR's
- Field Management – model calls & coaching calls
- The Game of Work – tracking
- Integration – inside sales, field sales, FAE's, channel sales
- Channel maturity – weeding out non-producers
- Increasing dedication & barriers to entry

### Session Eight 3:50 – 4:30

#### Refining Your Program – Putting It All Together

- Creating a reseller partner council
- Ongoing recruiting – replacing non-producers
- The plan of action – details with timelines
- Q & A to address all remaining channel questions

This is *one of the most comprehensive one day channel courses* ever offered. Be prepared for a high-speed, fire hydrant delivery, with a density of information that will make your head spin. Fortunately, the workbook contains every slide and has lines for copious notes—so bring a full ink pen!

You will sit with one of the industry's top channel masters and learn more information that will help you build a successful SaaS channel in one day than you could get from years of trying it yourself—it is the ultimate **Channel Boot-Camp**.

### Sign up Today!

This post-conference seminar is hands on and personal, so enrollment is *very* limited. Sign up today to ensure your spot. Discounts are offered for multiple attendees from the same company (to level-set your entire team).

**First time ever--Become a Certified Channel Manager.** Workshop cost includes training, e-learning re-training & review, test & certification! All for less than the cost for certification alone.

#### Register at [www.SoftLetter.com](http://www.SoftLetter.com)

(Click on the SaaS University link, select Channel Management Workshop if attending SaaS conference.)

#### Register at [www.Chanimal.com](http://www.Chanimal.com) if not attending

(Click on the Channel Workshop link on home page if *not* attending SaaS University)

Or Call

512-263-9618 or 512-947-7016

for more details



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