

## CRM, PRM, BRM or others... What do you need to manage your partner organization?

A lot has been written about technology stacks for ecosystem management. There's often a misconception of which systems provide what service. To keep a high-level overview, we listed the most common systems out there being used by the best partner organizations.



### Customer Relationship Management (CRM)

#### What?

- Repository: centralizing customer data
- Managing pipeline and opportunities
- Reports: having a system of records and reporting

#### For whom?

- Direct sales teams: funnel management, deal regs, contacts...
- Indirect sales teams: deal regs, partner account data, contacts



### Partner Relationship Management (PRM) and portals

#### What?

- Marketing collateral: share partner documents
- Deal registration
- Portal support: centralize admin

#### For whom?

- Indirect sales teams: replaces portal functions
- Marketing teams: share partner collateral and support for campaigns



### Mutual Success Planning (OKR framework)

#### What?

- OKRs (Objectives & Key Results) for Joint action and partner planning
- Shared space: partner commitment & accountability
- Partner Success Measures: predictable partner relationships

#### For whom?

- Indirect sales teams: automate onboarding and partner planning
- Marketing & enablement: follow-up on programs and training
- Leadership: provide insight in leading and lagging success factors



### Partner Ecosystem Platform (PEP)

#### What?

- Account mapping: identify overlaps in customers, opportunities and leads
- Co-selling: execute co-selling and marketing efforts on account level

#### For whom?

- Sales teams: identify co-sell opportunities
- Marketing: data sharing & account-based marketing

## Ecosystem success builder



**Fundamentals:** Get the basics right and install the right solution to manage partners.

Install your portal, marketplace and streamline co-selling with partners

**Advanced:** Develop the supporting (business) plans and create the accountability you need to achieve your KPIs with OKRs

**Expert:** Grab (joint) opportunities, follow up and collaborate on mutual accounts, professionalize your partner tech with PEP

