



ChristianSteven Software Case Study

“We need to recruit partners and get them up to speed quickly.”



Background

ChristianSteven Software (CSS) delivers advanced Business Intelligence (BI) solutions that solve mission-critical large enterprise needs and includes reporting, distribution, scheduling, dashboards and automating business processes.

Information and insight is delivered intelligently to all stakeholders including management, employees, partners and customers. Their solutions aim to unleash the power of data and transform the way their customers do business.

Challenge

CSS was expanding rapidly and part of that expansion strategy was adding OEM, VAR, and ISV partners to their indirect sales channel. Part of this expansion entailed bringing on global partners that would be supported with on-demand access to content to help eliminate manual processes. Several challenges were immediately identified as they attempted to build their channel program from recruiting through planning through supporting their partners with a technology solution.

- A partner onboarding process that would engage their partners from the start and provide them with the resources they need for immediate success, like marketing material, sales playbooks, and product-related training documentation
- A lead management program that would allow their partners to register leads and allows CSS to deliver qualified leads down to the partner level
- Content management functionality that allows the delivery of sales, marketing, and partner application documents that are easy to find and relevant to the job role of each specific user
- Reporting capabilities for insight into their lead pipeline and user activity within the system
- Improved communication with channel partners for joint engagement in sales opportunities

Solution

CSS designed a streamlined onboarding process through the LogicBay Partner Relationship Management (PRM) system that allowed them to quickly and effectively get new partners up to speed. This was a critical component to their recruitment process which was focused on bringing in the right partners – not just any partners – and making sure that they had access to the content and an understanding of sales best practices to hit the ground running. A thorough content audit was performed with the help of their consulting team to identify what existing content could best be put to use, and what gaps existed that needed to be filled for continuous improvement.

The Channel Management team at CSS quickly implemented a lead management process that allowed partners to register leads for approval, and gave the CSS team the ability to deliver qualified leads down to the partner level. This provided a more comprehensive understanding of their lead pipeline and gave CSS the ability to provide targeted sales support throughout the process to help improve close rates.

Result

Through effective delivery of documentation and sales and marketing collateral, CSS was able to implement a formalized onboarding program for their new channel partners. This included step-by-step sales processes, sales playbooks, market evaluation criteria, and tactics to nurture and upsell prospects throughout the sales cycle. CSS was able to monitor the progress of these initiatives through a weekly reporting process that gave management the insight they needed for each new partner around level of engagement and new lead activity. CSS was able to get new partners up to speed much faster than the prior methods which included manual processes and an overall lack of communication. CSS also found that the PRM system has given them the ability to grow into new areas of partner support such as a formal certification and incentive program without having to evaluate new technology solutions to meet those requirements.

About Us

LogicBay has been helping companies achieve breakthrough performance from their sales channels by applying proven best practices combined with Partner Relationship Management (PRM) technology since 2003.