

Building Effective Partnering Relationships with Other Resellers

Topics:

- Trust
- Structure
- Sharing (egos get in the way)
- Sourcing
- Lessons learned- what's gone wrong
- Experience
- Complementary services
- When to Partner:
 - o Is it strategic to support growth goals or simply opportunistic?
- How to find partners in a region or market that you don't have coverage in
- Trust- who does what in the relationship, reciprocity
- Contracts, NDAs, non-competes that will keep a "partner" from taking your business; rules of engagement
- Protecting your hourly rate; not giving up too much just to get the business – hourly rates on both sides need to be equitable
- Defining the project, and the costs, up front, to reduce risk (also credit checks on potential partners to reduce risk)
- Personal Networks
- Vendor/Partner Engagement
- How to partner with Software Vendors
- Vetting/Build more effective partnerships
- Account encroachment from vendors
- How to become more visible
- Geographic Coverage
- Contract Covenants – Successes/Failures/Best Practices

When to partner:

- Do the analysis to determine if it would cost you more to do the work in house than to contract with partner
- Honesty with customer is the best policy; be up front about what you're using a partner for= to protect relationship and prevent total surprises later.
 - o Responsibility to customer

Defining relationships:

- Agreements
- Rules of Engagement
- Why Partner?
- Extending coverage
- Trust
 - o Mutual
 - o Benefit
- Reciprocity
- Complementary
- Networks

Geographic Challenges

- Due Diligence
- Services Networks
- Vendor sourcing
- Personal outreach
- Qualifying the skill set
 - o Personal face to face interviews
 - o Business philosophy
 - o Identify potential troubles before contract negotiations
 - o Trusted vendor
 - o Microsoft Partner Network
 - o Service Networks

Contracts

- Define your responsibilities
- Rules of Engagement:
 - o Specify who will perform the work by NAME
 - o Limiting – sub-direct billing/compete
- There are different Agreements for difference types of partnerships
- No general non-compete in certain jurisdictions (i.e. CA)
 - o Specify details of non-compete
- Details/complexity determined by face value
- Non-disclosure
- Rate Structure/Payment schedule
- Non-solicitation
- Solid scope of work
- Fixed price/bid – rate/fee cap for work
 - o 10% over initial estimate
- Non-compete
- Non-solicitation
- Rate Structure Lockdown
 - o Fixed rate/cap limit
- Well define Scope of work/deliverables
- Branding/Corporate identity
- NDA, SLAs
- Challenges:
 - o Scope Creep
 - Customer doesn't fulfill due diligence questions
 - Tight management of subs

Vetting/identify the right partner/Partner Location

- What helps in identifying good partner opportunities?
 - o References from Vendor, Customer, Peer

- Philosophical Synergy
- Existing network membership
- Face-to-face interviews
- Trade Groups/Associations/Events
 - Personal networking
 - Frequent meetings
 - VentureTech – C-level (Tech select, TechData, Ingram micro)
- Technologies in Common
- Vendors – establish proficiency/certifications
- Peer Groups – used to establish Trust Relations
- Executive/C-level Meetings/Referrals
- Services Networks (IMonsite, OnForce, etc.)
- Social Networking sites

Managing the relationship/opportunity/job

- Well defined scope of work
 - Vendor
 - work TBD
 - Client
 - Finished results
- Project Manager/point of contact internally- “runs the show” & in contact with customer daily
- Problem handling – communicate to Project Manager ASAP
- Customer Sign-off via Electronic/web site
- Communication tools:
 - Sharepoint with workflows
 - Phone – VM- Text message
 - PSA
 - Spreadsheets
- Feedback from client – immediate to eval. Quality

Vendor Recommending You

- Certification/credentials with vendor to help increase visibility
- Shared Case Studies
- Beta Testing Vendor Products
- Lunch-N-Learns
- Vendor Reps Relations
- Attend Partner Conferences
 - Speaking engagements
 - Increased credibility

What CompTIA can provide:

- What does a partnership contract look like?
- Rules of engagement for partnerships