

# GYAN SYS

White Paper

## **Streamline & Sustain Partner Relations** **with Salesforce PRM Solutions**

Including case studies on

**FICO**<sup>®</sup>



samsara

## Streamline & Sustain Partner Relations with Salesforce PRM Solutions

Companies that are successfully co-selling through partners know that complexity is best solved through a structured partner management approach augmented by technology. Success depends on the success of your partner ecosystem. Creating and managing this partner ecosystem can be a challenging undertaking. Implementing PRM solutions without a well-defined channel strategy will result in many frustrated partners.

Today, companies that win in the market work with partners in a more transparent, collaborative, and connected way. This agile process includes co-innovating joint solutions, co-investing in marketing and sales initiatives fluidly between partners, and co-selling to bring all resources together to close business more effectively.

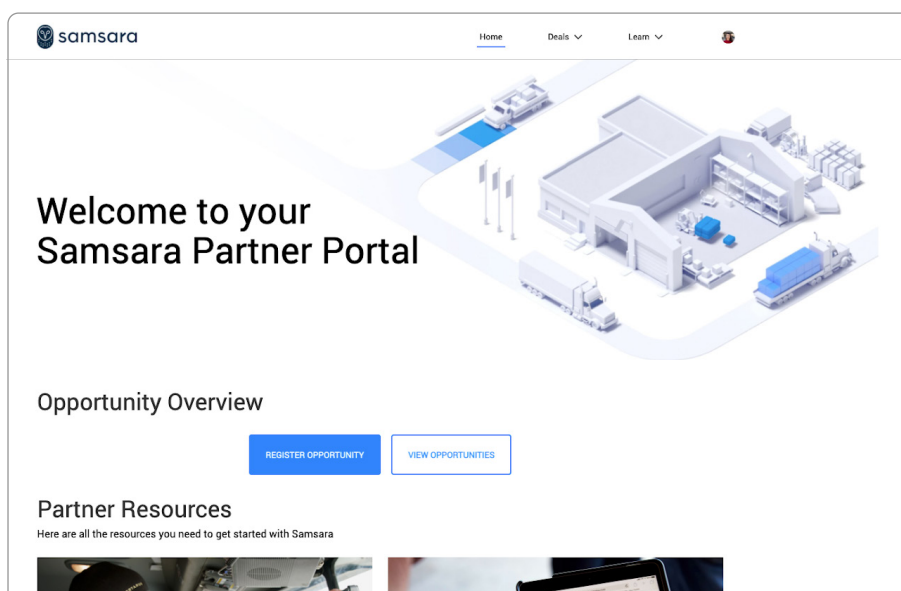
[Salesforce Partner Relationship Management](#) is an agile solution that will drive your partner's performance by easily managing co-sellers, distributors, and brokers all in one place. To address co-marketing and co-sales challenges, your team can easily design and manage smart partner portals to remove friction and focus more on partner productivity and improve channel visibility.

### Smooth Partner Onboarding

Partner onboarding is more than merely signing a contract. The main goal of [Salesforce PRM](#) is to help you solidify early engagement and provide clear direction on the type of support you intend to deliver, such as training, access to tools and resources, information on incentives and rewards, as well as easy access to their dedicated account manager. It is also important to make sure that your onboarding is trackable and supplies your team with the ongoing progress of partners over time.

At a minimum, your onboarding program should ensure your partners are more productive and get them up to speed on the basics, such as main products and features, pricing structures, selling processes, and the goals of the partnership. Build the communication system to be flexible so your partners are not bombarded or given information on products they are not planning or budgeting on selling. Salesforce PRM streamlines the entire partner lifecycle and automatically guides partners through a tailored onboarding path. You can easily create partner engagement and performance indicators, including completion of training with certifications or badges, lead generations, and total revenue. Sales and marketing resources are available on demand, with simultaneous update notifications when changes are made to documentation or links, empowering partners to be more productive.

For [Samsara](#), the partner onboarding workflow was crucial to the success of their new partner portal project. While scoping their project, GyanSys identified several high-priority enhancements that needed to be addressed: implementing quote templates, product & price rules, and identifying quick actions.



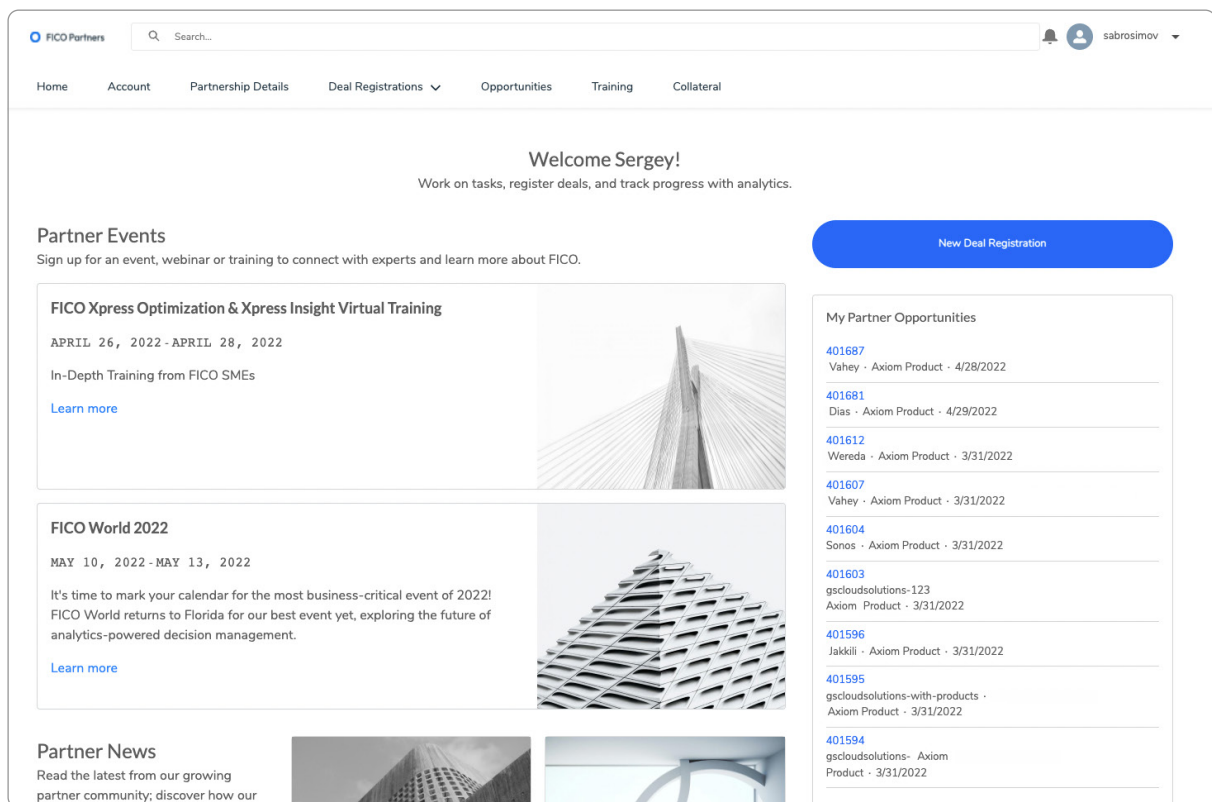
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GyanSys's implementation empowers Samsara's partner sales managers to manually assign a partner to a deal so they can actively work on it together. Managers also get access to reports on partner performance within their specific regions, with deal routing and tracking. To improve their partner communication strategy, Samsara's marketing team can manage the publication of content and news for partners, as well as gain insight into the areas most used and underused by partners.

### Smarter Partner Enablement

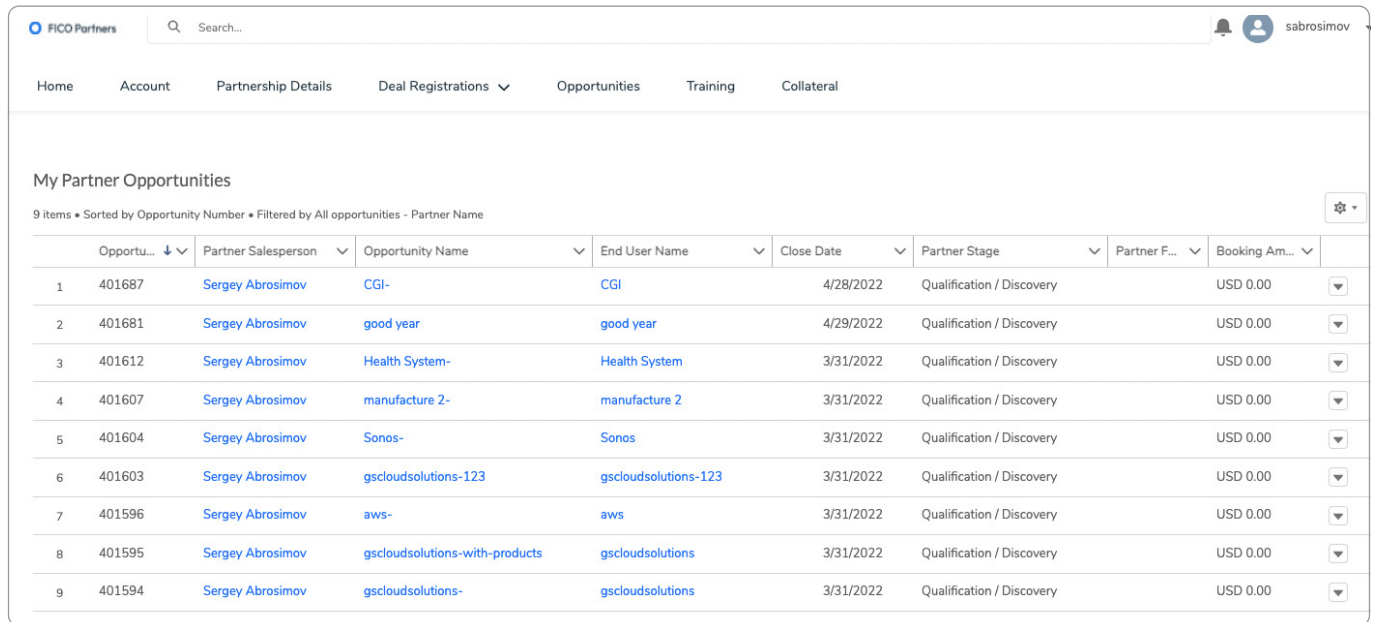
Bringing Partners together from different locations with differing expectations and styles of operation can be challenging. A key strategy to overcome this is to provide a unified interface designed to answer Partners' product questions and inform them about rules of engagement, policies, and guidelines. Comprehensive training programs are also important so that all users know your products inside and out.

Salesforce PRM allows you to focus on relationships versus transactions. Your team can get real-time AI-powered reports to track partner performance and prebuilt campaigns to make it easier for your team to market your products or services. Using templates and drag-and-drop features, you can easily customize partner portals to help automate workflows and track updates and lead information. Along with digitization processes, Salesforce PRM also empowers you to involve Partners in exploring and electing what new products or services they think will be optimal to offer via their channel.



**FICO** partnered with GyanSys to create a Partner Portal that processes their applications and once approved, automatically provides new Partners with access to the Community. We were specifically able to enable login access through SSO with Okta, without the need for Partners to create another account. From day one, the system provides Partners with helpful onboarding tips and allow partners to manage their own profile to ensure information is kept up to date. Partners are now able to access collateral and resources (videos, PDFs, marketing material, etc.) and get detailed training. We also created Partner dashboards to display performance, open and closed deals to date, overall revenue, and other key metrics.

## Streamline &amp; Sustain Partner Relations with Salesforce PRM Solutions



**FICO Partners** Search... sabrosimov

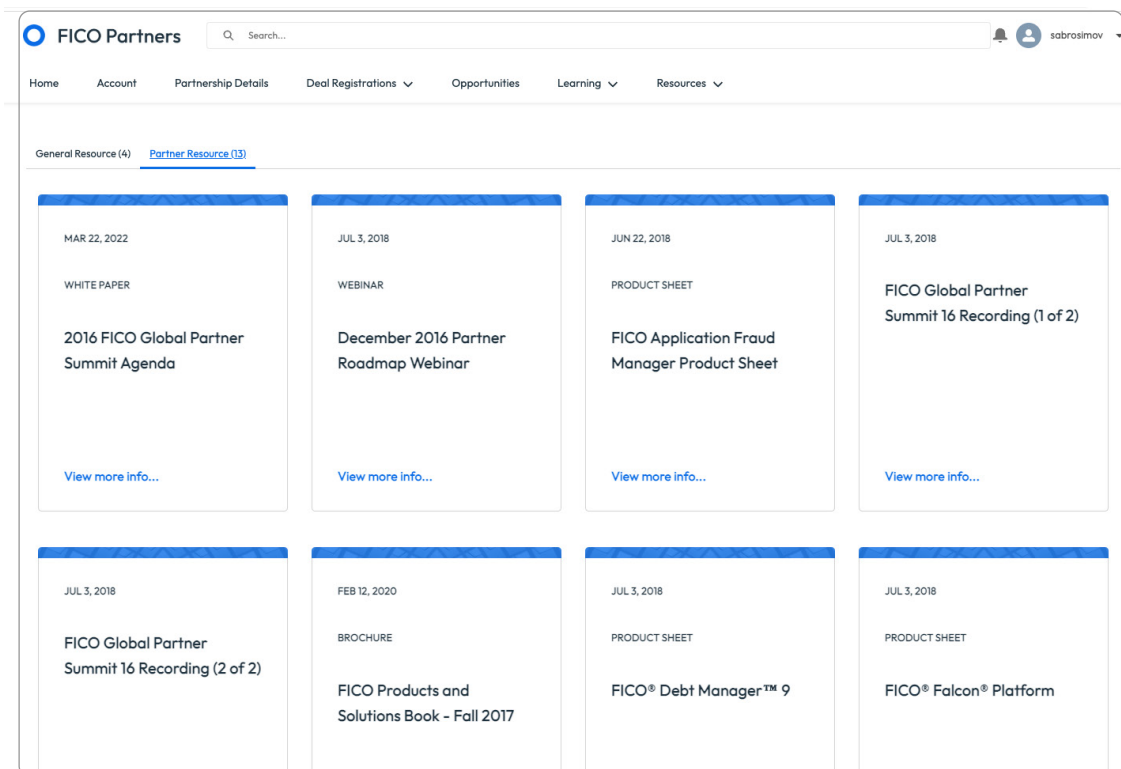
Home Account Partnership Details Deal Registrations Opportunities Training Collateral

**My Partner Opportunities**

9 items • Sorted by Opportunity Number • Filtered by All opportunities - Partner Name

	Opportu... ↓	Partner Salesperson	Opportunity Name	End User Name	Close Date	Partner Stage	Partner F...	Booking Am...	
1	401687	Sergey Abrosimov	CGI-	CGI	4/28/2022	Qualification / Discovery		USD 0.00	▼
2	401681	Sergey Abrosimov	good year	good year	4/29/2022	Qualification / Discovery		USD 0.00	▼
3	401612	Sergey Abrosimov	Health System-	Health System	3/31/2022	Qualification / Discovery		USD 0.00	▼
4	401607	Sergey Abrosimov	manufacture 2-	manufacture 2	3/31/2022	Qualification / Discovery		USD 0.00	▼
5	401604	Sergey Abrosimov	Sonos-	Sonos	3/31/2022	Qualification / Discovery		USD 0.00	▼
6	401603	Sergey Abrosimov	gscloudsolutions-123	gscloudsolutions-123	3/31/2022	Qualification / Discovery		USD 0.00	▼
7	401596	Sergey Abrosimov	aws-	aws	3/31/2022	Qualification / Discovery		USD 0.00	▼
8	401595	Sergey Abrosimov	gscloudsolutions-with-products	gscloudsolutions	3/31/2022	Qualification / Discovery		USD 0.00	▼
9	401594	Sergey Abrosimov	gscloudsolutions-	gscloudsolutions	3/31/2022	Qualification / Discovery		USD 0.00	▼

With the new Salesforce PRM platform, FICO Channel marketers can create and share marketing campaigns, guidelines, and assets with Partners. They can also customize the look and feel of the marketplace and highlight information that is important to partners. Internal FICO users will be able to track overall partner progress and see who their best-performing Partners are within each region. They will also be able to track co-marketing campaigns and see campaign performance, as well as how Partners are engaging with the portal. With the Partner locator tool, external users can also look up partners based on defined filters and views.



**FICO Partners** Search... sabrosimov

Home Account Partnership Details Deal Registrations Opportunities Learning Resources

General Resource (4) [Partner Resource \(13\)](#)

<p>MAR 22, 2022</p> <p>WHITE PAPER</p> <p>2016 FICO Global Partner Summit Agenda</p> <p><a href="#">View more info...</a></p>	<p>JUL 3, 2018</p> <p>WEBINAR</p> <p>December 2016 Partner Roadmap Webinar</p> <p><a href="#">View more info...</a></p>	<p>JUN 22, 2018</p> <p>PRODUCT SHEET</p> <p>FICO Application Fraud Manager Product Sheet</p> <p><a href="#">View more info...</a></p>	<p>JUL 3, 2018</p> <p>FICO Global Partner Summit 16 Recording (1 of 2)</p> <p><a href="#">View more info...</a></p>
<p>JUL 3, 2018</p> <p>FICO Global Partner Summit 16 Recording (2 of 2)</p>	<p>FEB 12, 2020</p> <p>BROCHURE</p> <p>FICO Products and Solutions Book - Fall 2017</p>	<p>JUL 3, 2018</p> <p>PRODUCT SHEET</p> <p>FICO® Debt Manager™ 9</p>	<p>JUL 3, 2018</p> <p>PRODUCT SHEET</p> <p>FICO® Falcon® Platform</p>

## Streamline & Sustain Partner Relations with Salesforce PRM Solutions

### Simple Deal Registration and Management

As the size of your Partner programs grow, so will the size and volume of your deals. Your PRM solution should provide clarity on opportunities, and streamline lead management processes to decrease record duplication. This means that every phase of the lead lifecycle needs to be visible, which should lessen any chance of channel conflict. As every stage of incoming opportunities are transparent, sales cycles are reduced considerably and you can focus on creating specific pricing offers and business development.

Salesforce PRM enables a robust lead management workflow: a rich activity timeline lets you access leads' most up-to-date contact information, and see from which marketing campaign the lead came. The platform will easily set up automatic lead scoring, and also routing to make sure leads never fall through the cracks and the right partner is assigned. This allows you to focus on making smarter decisions about where to invest within your partner network, and track the impact of all your marketing activities.

3 items • Sorted by Name • Filtered by All leads							
	Name ↑	Company	Estimated Close...	Estimated Deal Size (USD)	Lead Status	Rejection Reason	Partner Salesperson
1	asus asus	asus	3/31/2022	USD 123,123.00	Rejected	Duplicate registration request	Sergey Abrosimov
2	matt djsk	matt dddd	4/26/2022	USD 343,432,423,423.00	Submitted		Sergey Abrosimov
3	mattmatt mattmatt	mattmatt	4/13/2022	USD 323,132,312.00	Submitted		Sergey Abrosimov

GyanSys's detailed PRM deployment for [FICO](#) also included lead management components including deal registrations and referrals. The custom deal registration process was created with pre-defined criteria, such as specific status options - new, submitted, approved, and declined. FICO Partners have the ability to register deals and have them attributed to their account. Once the Partner Account Managers (PAMs) get notified about a new deal, they will have the ability to review and approve or reject the deal. Partners will be able to check the status of the deal and will also be notified when the status of a request has changed. There is also a Partner referral workflow, where PAMs can manually associate a deal with a partner and the partner will be able to view key aspects of the deal from within the portal.

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**GyanSys has extensive experience implementing custom Channel Partner Structures and agile platforms with real-time views of the entire partner business and enabling clients to efficiently manage their partner lifecycles.**



Quickly  
onboard partners



Streamline  
your workflows



Win  
partner satisfaction



Improve  
partner enablement



Boost  
sales revenues



Improve  
lead distribution



Centralize your sales  
and marketing initiatives



Improve deal  
registration processes

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