Channel Manager Playbook

RingCentral®

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Channel Overview and Principles

What is a Playbook?

Keep this resource where it is readily available and accessible.

This playbook gives you the core channel sales management tools to help you take a more proactive approach to managing your partners.

Some of the key components include:

- Outlining Channel Manager expectations
- Defining your top 15/30
- Managing your partner portfolio
- Executing partner plans
- Leveraging your dashboard
- Knowing your reporting and processes
- Influencing and motivating partners
- And additional best practices and coaching tips

The goal of this playbook is to help Channel managers select, develop, influence, and manage your partners for optimal revenue.

Zane Long's Vision

Playbook Objective

Establish a sustainable channel leadership and coaching framework aimed at all layers of channel management. Maximize the return on your channel management through...

- Planning Best Practice & Process
- Plan Execution Best Practices
- Pipeline / Forecast Methodology & Best Practices
- Partner Management Best Practices

Change Priorities For Channel Managers

From	To
Inconsistent coaching practices across the team	Repeatable framework of coaching with best practices, tools, and metrics
Unreliable forecasts and limited pipeline visibility	Managing through metrics via fact-based judgment and predictability created by accurate, data-driven information
"Under-leveraged" customer or partner relationships	Strategic development of prioritized accounts and partnerships
Managers are "Super Reps"	Managers are coaches and change leaders who maximize the performance of their partners (activity, qualified leads, sales training)
Individual/random approaches to team development	A defined framework for recruiting, training, supporting, and managing key stakeholders
A lack of a coherent strategy for meetings and interactions across the layers of the partner organization	A consistent planning and coaching cadence across the partner organization is developed, implemented, and followed

Return on Partner Management

RingCentral Channel Managers should strive to increase their individual "return on channel management" or ROPM as defined below:

ROPM

Financial Return on Enhanced Partner Management Divided by the Time Cost of the Channel Manager

Maximizing ROPM and Influencing Over Time

Management Leadership Framework

The Management Leadership Framework represents the four key areas where a Sales Manager needs to disproportionately focus their time and attention in order to effectively drive improved return on sales leadership (ROSL).

Portfolio Planning

A partner management cadence of activity & partner selection built around a set of best practices & strategies to help prioritize time and focus, enabling long-term success (revenue and value).

Dashboard & Reporting

A comprehensive approach to understanding the dashboards and reports that are leveraged by the channel to better develop, manage & coach partners towards optimal revenue.

Plan Execution

A formal "Channel Enablers" approach to identifying, developing and executing joint-partner plans, along with best practices for managing and reviewing with partners.

Influencing & Managing Partners

A formal coaching, partner management, and influencing model that grows channel management business acumen and stresses models of challenging and holding partners accountable to best-practice behavior.

Portfolio Planning

Portfolio Planning Principles

World-class Channel Managers understand that:

- Continual recruitment of stronger partner/team profiles is necessary to increase their ability to achieve and supersede increasing quotas.
- Deciding on which partners/teams to recruit and which partners/teams to develop becomes critical to achieving consistent quota success.

Partner Recruitment

How will I maximize revenue this year across my territory?

- **Territory IQ:** Awareness of top partners and teams
- **Territory Vision:** How many and which partner/team types are needed to hit quota targets?
- **Territory Strategies**: Which partners/teams should be targeted? What is the plan of attack for this quarter? For the next three quarters?

Portfolio Selection

What are the key items and process to know?

- **Profile IQ:** Creating a balance between different types of profiles
- **Key deciding factors:** Think three quarters out: What is their qualified lead capacity? Discovery capabilities? Complementary core solutions? Customer base readiness?
- **Timelines and process**
- **Enablement status**

Partner Development

How can I maximize the long-term value of this partner/team?

- **Partner/Team IQ:** Knowledge of profile and potential
- **Partner/Team Vision:** Where does this partner/team need to be in 3 months? 6 months? Year end?
- **Partner/Team Strategies:** Realistic qualified lead goals, partner/team enablement timelines, time management, resource planning

Top 15/20/30 Selection

With whom will I spend 80% of my time this quarter?

- Who will get me to my quarterly number a year from now?
- How many of each partner profile should I have?
- Do I have a good mix of different customer sizes?
- What quality of leads are partner's bringing in?

Partner Recruitment

Recruitment Expectations

- **RCM:** Recruit 10 partners every quarter.
- **ICM 0–6 months:** Recruit 15 partners every quarter.
- **ICM 6+ months:** Recruit 20 partners every quarter.

Typical Partner Profiles*

Cloud Services	Provide multiple complementary cloud services like O365, G-Suite, and Okta.
IT Consultants	Provide strategic IT services and solutions support and appear to be agnostic in vender selection.
Integrators	Provide a host of services related to their core professional service offering.
Managed Service Providers	Provide third-party managed services to support a company's various IT teams.
Network Providers	Provide a host of network solutions to customers, normally tied to their managed service offerings.
Telecommunications	Provide on-premise telecommunication solutions and usually have a long history of selling carrier bundles like CenturyLink and Cox.

** Most partners are a mix of the above*

ZANE-ISM: "RECRUIT. RECRUIT. RECRUIT!"

Best Practices

Analyze industry, territory/geography, and macro-economic trends to understand strategic partner types for your markets. Some of the factors to consider are:

- Top industries/verticals within your major metro areas.
- Top technology sales companies in your major markets.
- Top sub-agents of the various Master Agents in your markets.

Key factors to look at:

- **Capacities:** How much time will this partner give to building out a cloud/UCaaS/RingCentral practice? Do they have the support structure in place to service their customers?
- **Capabilities:** How capable are they in targeting UCaaS/RingCentral opportunities?
- **Customers:** How many and what is the average size of their customer base? What type of solutions do customers buy from the partner?
- **Commitment:** What is their ability to agree and commit to the RingCentral sales process?

Keys to Success

- **Be a Territory Expert:** Know your territory's highest revenue partners, biggest companies, and top competitors.
- **Think Ahead:** Are you recruiting the partners who will help you hit your number a year from now?
- **Ask Questions:** Make sure to leverage Channel resources and your manager as well as others on the team.
- **Be Coachable:** We have a lot of great recruiters within the organization—seek them out and learn from them!

Partner Development

Development Expectations

- **First 12 months:** Deliver 3 trainings per week
- **12+ months:** Deliver 5 trainings per week

Typical Partner Training Topics

Partner Strategy	Know your partner's business, initiatives, and goals as they change throughout the year.
Partner Program	Continual reinforcement of program differentiators is critical; they will always need to hear it "one more time"!
Partner Portal	Contains all necessary items to be successful: Lead registration, sales tools and resources, support, and trainings.
Sales Process	Clear understanding and messaging necessary to gain the level of trust that the partner needs to drive qualified lead registrations.
Partner Support	Constant reinforcement of the support process will drive the needed mindshare for the partner to invest resources with us.
Product Demos	Utilize your Channel Sales Engineers to demonstrate the product to highlight the customer benefits of the product and platform.

ZANE-ISM: "10 TIMES, 10 DIFFERENT WAYS!"

Best Practices

Analyze your partner portfolio and focus on key metrics for future success. Just because a partner is not engaged now does not mean that they won't engage in the future. Some factors to consider are:

- **Growing MRR cloud business:** This means they are set up to sell and commission their team from MRR contracts.
- **Completed the KPIs:** This is a decent barometer of their engagement and trust in our program.
- **Quality leads:** Increasing volume and high conversion rates are good indicators of a quality sales team.

Key enablement partner categories:

- **Achiever:** They already are at optimal revenue and will continue to produce.
- **Believer:** They hold the key to hitting your number. Continue to coach them towards optimal revenue and self-sufficiency.
- **Deceiver:** These partners promise a lot and produce very little. If they have a strong profile, you might want to keep of few of them.
- **Transitional:** These are the partners you drop out of your portfolio.

Keys to Success

- **Be smart:** Consciously choose who you spend the most time with.
- **Think ahead:** Are you developing the partners who will help you hit your number a year from now?
- **Ask questions:** Make sure to leverage Channel resources, including your manager others on the team.
- **Zane Long:** "We compete on programs and not product for mindshare. Never stop developing your partners."

Portfolio Selection

What is it?

- Every Channel Manager will choose the partners that they would like to work with each quarter.
- **RCM:** The maximum amount of partners that you will choose every quarter depends on your longevity within the program.
    - <12 months: 40 Partners
    - >12 months: 45 partners
- **ICM:** The maximum amount of partners that you will choose every quarter is **60 partners**.
- Each Channel Management group will need to utilize a variety of metrics and filters to choose partners that will allow them to succeed in both the immediate quarter and in the quarters to come.
- It is common for your portfolio to grow over the span of a quarter as you actively recruit and receive partners who seek us out.
- Make sure you fill out the partner profile section of each of your partners within SFDC.

Best Practices

Analyze each partner and give justification as to why you should continue to manage them. Ask yourselves these questions:

- Will this partner have the right profile to generate the necessary qualified leads that I need to be successful?
- Will this partner increase their qualified lead velocity if I continue to enable them?

Ensure that you do not have too many of the same partner profiles. Criteria to be watchful of are:

- **Partner types:** Too much of one type will place your portfolio at risk.
- **Upmarket Opps:** You will need partners that bring in a higher volume of upmarket opportunities. These take longer to close but you will not be able to hit your commission accelerators without them.

Focus on partners with strong customer portfolios. Even if these partners struggle to remain engaged in the short term, when their business inevitably shifts to UCaaS, they will become big performers.

Keys to Success

Categorize your partners to holistically view your portfolio:

- **Achiever:** Will produce with little management.
- **Believer:** Need constant coaching to maintain and increase mindshare. Most of your partners will be this category.
- **Deceiver:** These partners promise a lot but do not deliver. However, if they have the right profile they are worth keeping. Just be careful of spending too much time with them.
- **Transitional:** Drop them from your portfolio as soon as possible.

ZANE-ISM: "YOUR PORTFOLIO IS YOUR BUSINESS"

Partner Draft: Best Practices

A quick reference to help you understand the partner draft. Please reach out to your manager/director for more guidance.

STEP 1

Channel Managers (RCM/ICM)

Process guidelines:

- Channel Ops will send out the Google Sheets template.
- Your current partners will be listed within your own tab (For new hires, you will have a blank tab)
- Place an "X" in the appropriate "Remove" column for those you want to drop.
- Place an "X" along with the Partner ID and company name in the appropriate column for those you want to add.

Tips:

- **Be Honest:** Accurately assessing the ability of a partner to produce will increase your chances of not spending time with the wrong partners. *Partner profile*
- **Perspective:** Keep in mind that enablement takes about 6 – 9 months to see maximum impact. Keeping a partner due to current pipeline does not equal a productive partner for future quarters.
- **Be Professional:** If you are looking to add a partner, have a strategic business reason for doing so and reach out to the current Channel Manager and discuss.

STEP 2

Draft Finalization

Process guidelines:

- Leadership reviews partner assignments within their respective territories
- Assignment conflict is addressed and resolved.
- Final assignments are sent to respective channel management teams.

Tips:

- **Partner IDs:** Ensure that ALL partner IDs are migrated to new Channel Manager assignee.
- **Territory:** All partners must reside within territory assigned to the Channel Manager unless approved by Zane Long.
- **Contract:** Verify the buying contract status for each partner (Master Agent vs. Direct)

STEP 3

Resolving Conflict

Process guidelines:

- Notify your Manager/Director if you will be adding new partners to your portfolio
- Reach out to existing Manager/Director and Channel Manager of the partner and justify your decision.
- If conflict persists, have Manager/Director escalate to appropriate leadership team for final resolution.

Tips:

- **Justification:** Ensure that you provide adequate justification and knowledge of the partner profile when requesting to add a partner.
- **Partner profile:** Know the partner profile of the partner that you would like to add (located within SFDC), as well as any informal knowledge of the partner's business.
- **Be professional:** Good partners are the life blood of a Channel Manager's ability to be successful. Keep that in mind when resolving any partner assignee conflict.

RCM Top 15/20 Partner Selection

What is it?

- Selecting and developing a strong Top Partner list is critical to your success. The number of Top Partners correspond to your role and your duration within that role:
    - RCM <18 months: Top 15
    - RCM >18 months: Top 20
- Your Top Partners receive a special amount of attention. Below are the expectations:
    - 80% of your weekly activity
    - 1 visit a quarter
    - 1 Partner Customer Forum and Partner Customer Webinar a quarter
- The activity expectation for your other partners are as follows:
- Next third of partners: 1 visit/meeting a quarter
- Final third of partners: 1 visit/meeting every 6 months.

Best Practices

- Complete a partner assessment for each partner to maximize business knowledge.
- Maintain a consistent leadership strategy conversation so that you can adjust your management plan based upon the partner's go-to-market plans for RingCentral.
- Honestly evaluate the product importance of both UCaaS and RingCentral to the partner: Primary, Secondary, or Tertiary.
- Develop an activity plan that considers these key areas:
    - **Business IQ:** Stay on top of changes within business goals and initiatives to drive mindshare and evaluate their current place within your Top Partner list.
    - **Activity Vision:** Have a specific joint-revenue and non-revenue activity plan for events like Partner Customer Forums, Partner Customer Webinars, and sales trainings.
    - **GTM Plans:** Identify a handful of partners who would be willing to create a formal annual joint GTM plan.

Top Partner Checklist

- Identify your Top Partners on a spreadsheet provided to you by your manager.
- Make sure you rank them from 1 – 15/20 based upon expected revenue
- Maintain & update your Top 15/20 report daily to record activity & KPI completion
- 75% of Top 15/20 registered a new opportunity every quarter
- A Top 15/20 partner closes a deal each quarter
- Identify 1 partner to take part in our BDR program each quarter
- Complete 1 Partner Customer Forum each quarter
- Complete 1 Partner Customer Webinar each quarter

ZANE-ISM: "YOUR TOP PARTNERS SHOULD GET YOU TO 100% OF QUOTA."

ICM Top 30 Partner Selection

What is it?

- Selecting and developing a strong Top Partner list is critical to your success. You will select up to 30 TOP partners and add that to your Director's Top Partners sheet.
- Your Top Partners receive a special amount of attention.
  Below are the expectations:
  - 80% of your weekly activity
  - 1 meeting every month
  - The activity expectation for your other partners are as follows:
  - Next third of partners: 1 visit/meeting a quarter
  - Final third of partners: 1 visit/meeting every 6 months.
- At least one Top 30 partner should deliver 1 Partner Customer Webinar a quarter
- Each Top 30 partner should bring in 3 qualified leads a quarter

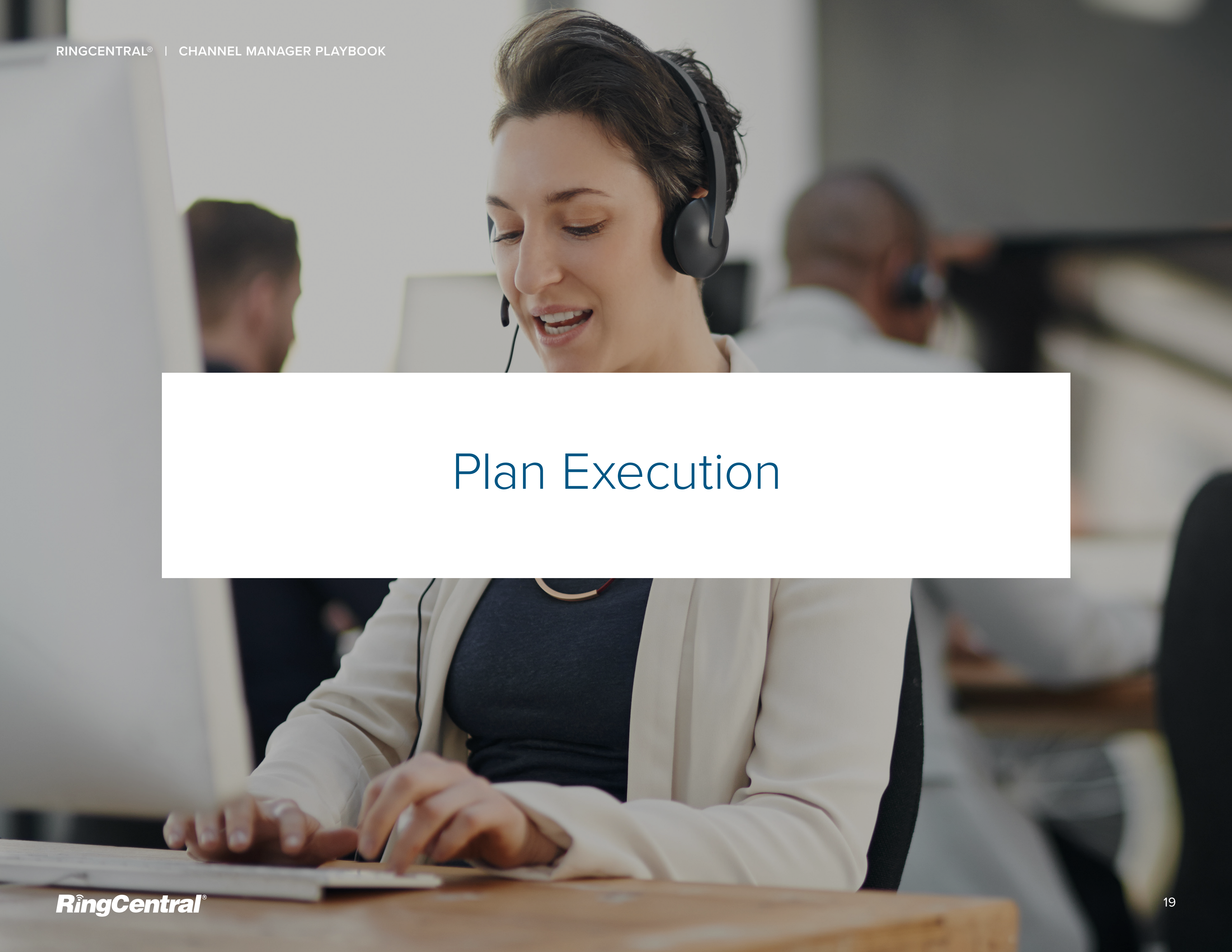
Best Practices

- Complete a partner assessment for each partner to maximize business knowledge.
- Maintain a consistent leadership strategy conversation so that you can adjust your management plan based upon the partner's go-to-market plans for RingCentral.
- Honestly evaluate the product importance of both UCaaS and RingCentral to the partner: Primary, Secondary, or Tertiary.
- Develop an activity plan that considers these key areas:
  - **Business IQ:** Stay on top of changes within business goals and initiatives to drive mindshare and evaluate their current place within your Top Partner list.
  - **Activity Vision:** Have a specific joint-revenue and non-revenue activity plan for events like Partner Customer Forums, Partner Customer Webinars, and sales trainings.
  - **GTM Plans:** Identify 1 – 2 of your Top 30 partners who would be willing to create a formal annual joint GTM plan.

Top Partner Checklist

- Identify your Top 30 on a spreadsheet provided to you by your manager
- Make sure you rank them from 1-30 based upon expected revenue
- Update your Top 30 twice a week to record activity
- Complete your rolling 10-day phone call to your Top 30.
- Complete 1 RC Meeting connection with your Top 30 every quarter
- Identify 1 partner to take part in our BDR program a quarter
- Update and re-rank your Top 30 periodically throughout the quarter

ZANE-ISM: "YOUR TOP PARTNERS SHOULD GET YOU TO 100% OF QUOTA."



Plan Execution

Effective Partner Planning

What is a Partner Plan?

- **Strategically** organize your activity for onboarding and developing a partner to maximize revenue in as short a time as possible.
- **Internal planning** allows you to lay a foundation by which all of your future activity with a partner will be built. This includes understanding their business and how to leverage relationships to better influence them over time.
- **External planning** is completed alongside the partner with the right ownership and buy-in on co-sponsored activities. You will have an annual revenue and qualified leads goal to help plan quarterly targeted revenue and non-revenue activity around.
- **Consistent plan reviews** train your partners that each planned activity is important to the success of both parties. Plan reviews improve partner accountability and engagement, so make sure you have one at least one per quarter!

S.M.A.R.T plans are successful plans

- **Specific**
- **Measurable**
- **Achievable**
- **Realistic**
- **Time bound**

Plan Execution Phases

Qualify

Top Partner

Criteria:

- Top 15/20/30
- Completed KPIs
- Consistent success

Do they have the right:

- Capacity
- Capabilities
- Customers
- Commitment

Development

Goals and Targets

Revenue:

- Annual revenue
- Quarterly targets to track success
- Align activity to accomplish targets

Activities

- Enabling partner team for success
- Gathering correct resources
- Design strategy with key stakeholders
- Align strategy with business goals
- Gain ownership

Execution

Joint Activity

Joint-revenue activity:

- S.M.A.R.T
- Define specific roles
- Clear benchmarks for success

Non-revenue activity:

- Focus on creating awareness and mindshare
- Tailor to individual stakeholders
- Strategically tie into joint-revenue activities

Review

Quarterly Review

Management:

- Adjust plan alignment as partner's business initiatives change
- Maintain frequent communication with operational stakeholders
- Celebrate successful activity

Review:

- Clearly define quarterly meeting expectations
- Acquire all necessary metrics and resources
- Be prepared!

Partner Qualification

Planning with the right partner

Strong Partner Profile	A strong profile includes business longevity, multiple sales reps, ability to run marketing campaigns, strong customer base with a sizable upmarket clientele.
KPI Completion	Partners have completed multiple certifications, have logo prominently displayed on their website, and have a demo account.
Constant Activity	Partner consistently registers leads every month with a track record of high conversion and close rates.
Customer Base	A strong customer base with many upmarket opportunities is preferred. A plus is a well-developed new customer sales process.
Complementary Solutions	Multiple complementary services (e.g. SD-WAN, Okta, MSP Service) allows a partner to sell the whole product to the end user.

Best Practices

- **Have a plan strategy** for each Top Partner accounts, even if they are unwilling to agree to a formal GTM plan.
- **Be flexible** with your plans. A partner's business initiatives can change quickly; adjust your plan accordingly to take advantage of these changes.
- **Engage your manager** to provide guidance on the partner profile that historically will agree to implement a joint plan.
- **Leverage your teammates** who have demonstrated consistent success with partners. Always be open to new ideas on how to better engage and plan with your partners.

Checklist

- Take the Effective Partner Planning course located within the partner portal.
- Utilize the posted Partner Assessment and other course materials located within the partner portal.
- Reach out to your manager and/or your channel field trainer for more details and guidance.

Plan Development

Indicators of a successful plan

Partner Assessment	Knowing the key business goals and initiatives as well as key stakeholders—both executive and operational—will be critical in gaining ownership.
Internal Planning	Have a realistic planned strategy of the potential revenue, enablement, and mindshare needed to have a successful plan.
Joint Planning	Set a clear annual revenue goal with clear quarterly targets to measure success. Make sure you discuss potential joint-revenue and non-revenue objectives to accomplish your targets.
Gaining Ownership	Partner ownership is key to a successful plan. Ensure that there is a clear understanding of who owns which parts of the plan and try to avoid “shared” responsibilities.
Gathering Resources	Resources are critical to accomplishing your quarterly targets and your annual goal. Know which resources are critical, and make sure you allow enough time to acquire them.
Required Partner Activities	Lead generation activities (LGAs) are a quarterly required activity. These include your partner customer webinars (PCWs), partner customer forums (PCFs), and the BDR program.

Best Practices

- **Always have a plan:** Have a strategic plan for each Top Partner that aligns with the partner’s goals and initiatives. Each meeting that you have builds momentum and gains mindshare.
- **Know your audience:** Adjust your plan messaging to fit the stakeholders that you are with. This will help ensure plan ownership from operational and influential team members that can make or break your plan.
- **S.M.A.R.T plans** are completed. Make sure your plan and objectives are Specific, Measurable, Achievable, Realistic and Timebound.
- **Leverage your team** to find out what joint revenue and non revenue objectives are working in the field!

Checklist

- Review the Partner planning module within the partner portal.
- Utilize the posted Partner Assessment and other course materials located within the partner portal.
- Discuss quarterly LGA requirements with your manager each quarter.
- Reach out to your manager and/or your channel field trainer for more details and guidance.

Plan Execution

Keys to great plan execution

Stakeholder Alignment	Ensure joint-revenue and non-revenue objectives align with the goals and initiatives of the operational stakeholders who are being asked to execute.
Team Management	Leverage partner team meetings to ensure consensus and gain the right commitment.
Objective Assessment	Set a clear annual revenue goal with clear quarterly targets to measure success. Make sure you discuss potential joint-revenue and non-revenue objectives to accomplish your targets.
Drag Revenue Tracking	Have a way to track the drag revenue that RingCentral provides to the partner's business. This will help the partner understand the true revenue benefit of partnering with RingCentral.
Celebrate Success	Plan to celebrate the success of your activities. Make sure you include ALL stakeholders who were critical in achieving success.

Best Practices

- **Maintaining alignment** requires intimate knowledge of how decisions are made and carried out with the partner. You will need to be flexible and adjust the plan as you go to keep proper alignment with shifting priorities of stakeholders.
- **Managing teams** can be tricky. Be aware of who is in the room and their responsibilities to ensure plan execution. Feel free to follow up individually with each member to gain agreement on which parts of the plan they will be owning.
- **Assess** the relative success and/or failure of your activities through clear measurements. Engage the right stakeholders to provide their own assessments.

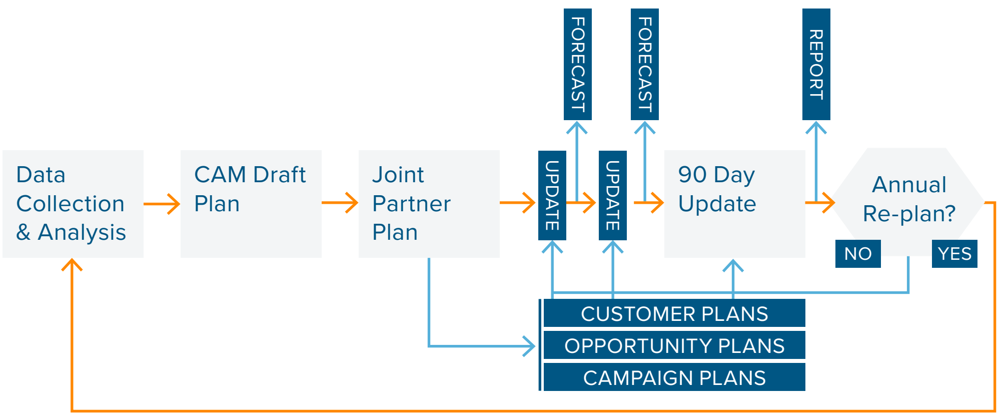
Checklist

- Review the Joint Partner Planning module within the EPP course that is located in the partner portal.
- Utilize the Joint-Revenue and Non-Revenue objective templates to organize your activity with your partners.
- Reach out to your manager and/or your channel field trainer for more details and guidance.

Plan Review

Keys to great plan execution

90-Day Review	Review your quarterly activity and show progression toward achieving your annual goal.
Annual Review	Annual plan review is the bulwark for future planning success. Include all key stakeholders who partook in the plan and celebrate individuals when given the opportunity.
Next Steps	Leave time in your annual review meeting to discuss the framework for the next plan. Always give them a reason as to why you will be returning to their office.



Best Practices

- **Gather the right resources** to ensure that your quarterly and annual meetings are as valuable as possible. This might entail data gathering on their end. Have a clear plan to gather that data as well.
- **Plan to review** with multiple audiences. Be aware of only reviewing with the executives and not the operational stakeholders who are also critical in achieving plan success.
- **Preparation** is critical to success. If you do not review or are ill-prepared to review, then you are training your partner that your plans do not matter.

Checklist

- Review Partner Planning Review module with the EPP course that is located in the partner portal.
- Utilize the posted Partner Assessment and other course materials located within the partner portal.
- Reach out to your manager and/or your channel field trainer for more details and guidance.

Lead Generation Activities (LGAs)

Required Quarterly LGAs

Partner Customer Webinar (PCW)

A joint webinar with the partner using the RingCentral Webinar tool. The audience is the partner's customers and will utilize a SME if available to deliver the sales pitch.

What we do:

- Provide SME for sales presentation
- Host and record the webinar
- Provide gift cards for prizes

Keys to Success

- Have attendees from 20 unique companies
- 60% conversion rate of qualified leads
- Your partner must have a customer list > 500 to qualify for a PCW.

Partner Customer Forum (PCF)

A joint activity with the partner and the AE team to introduce the RingCentral product and differentiators to the partner's customer base.

What we do:

- The programs team books venue/catering and creates invites and materials.
- RingCentral covers the cost of event.
- Provide gift cards for prizes

Keys to Success

- Have attendees from 20 unique companies
- 60% conversion rate of qualified leads

BDR Program

An upmarket customer business development program built and run by RingCentral's expert BDR team that targets the partner's customer list.

What we do:

- Run email and call-out BDR campaigns to generate qualified leads
- Generated qualified leads will follow standard ROE process and include a strategy meeting with partner before sales engagement with customer.

Keys to Success

- Attain a 20% appointment rate
- 40% close rate on engaged opportunities.

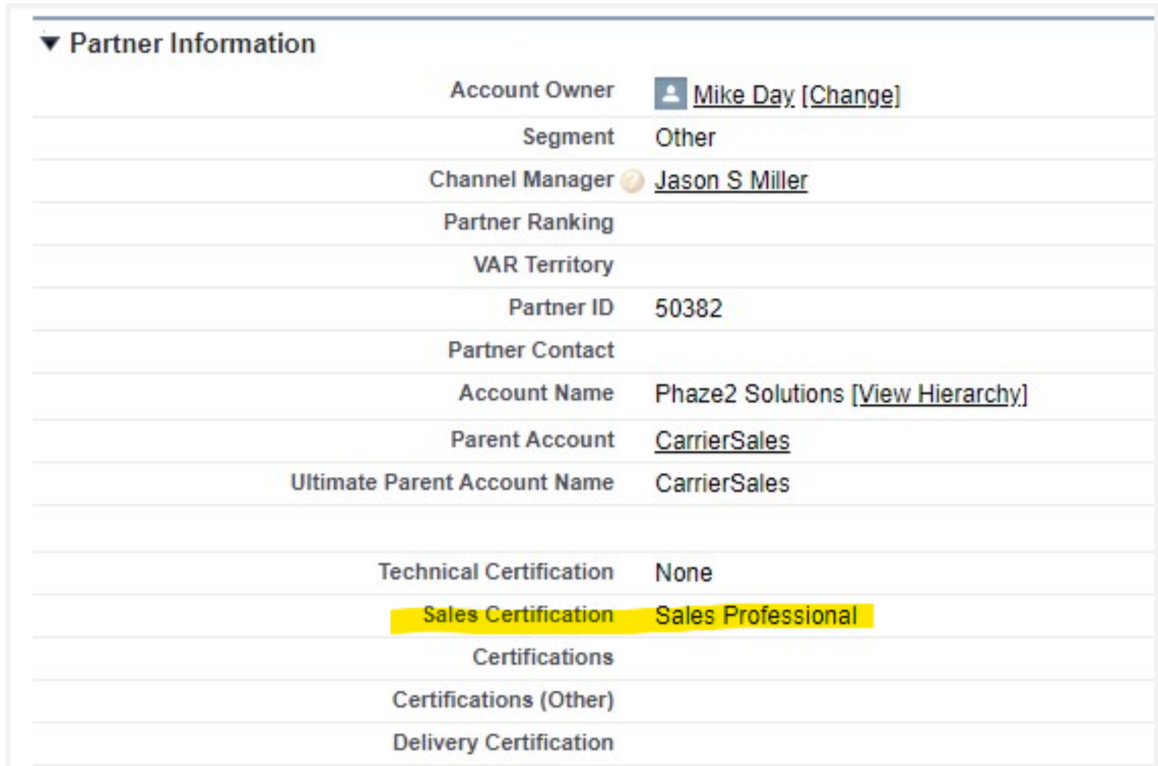
*LGA Process and MDF requests documents can found in the **Channel Resources** of the partner portal.*

MDF Best Practices

Marketing Development Funding (MDF) requests are used to secure funding and support for Lead Generating Activities. Before you complete a request, there are some requirements you should be aware of.

When completing an MDF request:

- Review with your manager prior to submitting
- Fill your MDF form out accurately:
    - Are Partner Certifications completed?
    - Is the customer logo on the website?
    - Other Partner IDs to include?
- You will receive approval within 24-48 hours
- Submit requests ASAP in the quarter
- Ensure a 4 week lead time to ensure adequate support



Partner Information

Account Owner	Mike Day [Change]
Segment	Other
Channel Manager	Jason S Miller
Partner Ranking	
VAR Territory	
Partner ID	50382
Partner Contact	
Account Name	Phaze2 Solutions [View Hierarchy]
Parent Account	CarrierSales
Ultimate Parent Account Name	CarrierSales
Technical Certification	None
Sales Certification	Sales Professional
Certifications	
Certifications (Other)	
Delivery Certification	

LGA Process and MDF requests documents can found in the ***Channel Resources*** *of the partner portal.*

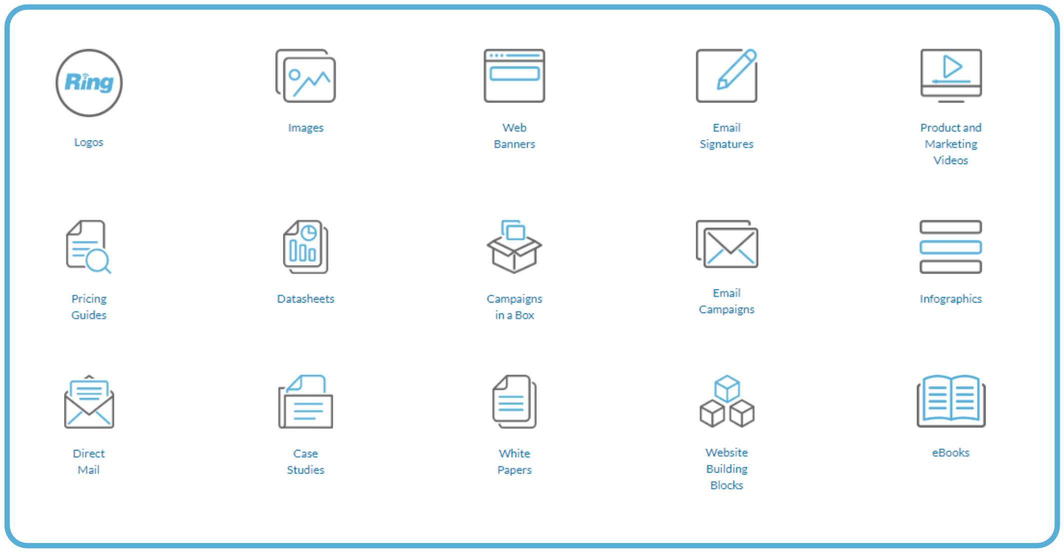
Other Go-to-Market Strategies & LGAs

While partners can get a login and peruse the partner portal on their own, as a channel manager, be sure you regularly call attention to partner portal resources and encourage their use.

A Great Resource For:

- Marketing Email Campaigns
- Campaigns-in-a-Box
- Print Collateral
- eBooks, Case Studies, White Papers
- And More!

The Partner Portal



Partner Portal: partners.ringcentral.com

Effective Partner Planning Review

Key Component Summary:

Internal Plan

A strategic approach to understanding your partner's business so that you can develop a realistic activity strategy to enable your partner for optimal revenue.

Plan includes:

- Partner assessment
- Partnership strategy goals
- Go-to-market readiness
- Shareholder analysis
- 90-day enablement action plan

Key stakeholders

Main contacts Name, title, responsibility	Location	Length of time in job	Yourco Coverage -2 to +2	Attitude to Yourco -2 to +2	Usual decision making role	Motivation and Power to influence decisions (H,M,L)	Remarks

Legend for key contact relationships					
	-2	-1	0	+1	+2
Current level of coverage	No contact	Some remote contact	Met once	Occasional	Frequent & Accessible
Attitude towards Yourco	Actively opposes	Prefers others	Neutral	Prefers Yourco	Actively promotes Yourco
Main decision making role or roles	**D**-Decision maker	**R**-Recommender / decision influencer	**O**–Operational implements decisions	**I**-Instigator of new initiatives and projects	**M**-Mentor providing information and may help to promote Yourco
ANY ITEM NOT COVERED	Colour the square RED				

Joint External Plan

A joint approach to developing a strategic partner go-to-market plan to ensure great activities and plan completion.

- Joint annual revenue goal
- Joint revenue objectives
- Non revenue objectives
- Meeting matrix and preparation
- Partnership leading indicator metrics
- QBR preparation

Joint revenue objectives

Joint Revenue Objective #1			
Summary description			
		Annual Revenue Targets	
Joint solution		VENDOR	
Market segment			
Benefit / Advantage		Partner	
What needs to happen			

Plan Communication and Maintenance

- Develop a strategic plan that aligns with multiple stakeholders' goals and initiatives.
- Customize messaging to keep plan momentum moving forward.
- Maintain plan alignment, control and direction to increase plan success.

Plus much more:

- Build effective teams
- Gain plan consensus
- Emphasize the value of meeting planning
- Provide in-depth activity and resource planning

For more details:

- See Channel Enablers Resources located within the partner portal

Dashboard & Reporting

Dashboards & Reporting Overview

World-class Channel Managers understand that:

- Leveraging existing data and metrics are the key to influencing and predicting behavior of a top partner.
- Knowing how to maximize each business intelligence tool and report will directly correlate to an increase in partner alignment and the number of qualified leads.

Salesforce Dashboard

A real-time reporting tool that displays all records tied to a Channel Manager. In addition, it gives the Channel Manager visibility into your partner lead activity to support the Channel Harmony program.

Power BI

Daily updates of Top Account KPIs and reports with the ability to identify historical activity trends and targets to monitor the relative health of a Channel Manager's portfolio and territory.

Channel Manager Scorecard

An excel-based scorecard that provides a stack ranking of Channel Managers based on a variety of channel partner metrics such as KPIs and sales activity. KPIs include completion of certifications, having the RingCentral logo on their website, and using RingCentral Office as their phone system.

Top Partner Participation Report

A targeted excel-based report that provides an overview of lead, opportunity, and closed sales production of top partners.

Top 15/20/30 Partner Report

A stack ranked targeted excel-based report that provides key KPIs, activity point values, and other lead generation activities (LGAs) of a channel manager's top partners.

Salesforce Dashboard

Purpose

- To provide a single dashboard for all channel partner records tied to a channel manager.

Key tracking components

- Leads (active and stagnant)
- Opportunities
- Partner customers
- Up-market strategy meetings
- Partner profile completion

Best Practices

- View your dashboard each day to ensure proper management of partner activities.
- Resolve any outstanding schedule meetings and incomplete partner records as quickly as possible.

Dashboard Link

Questions? Feel free to reach out to Channel Ops: channel.ops@ringcentral.com

Power BI

Purpose

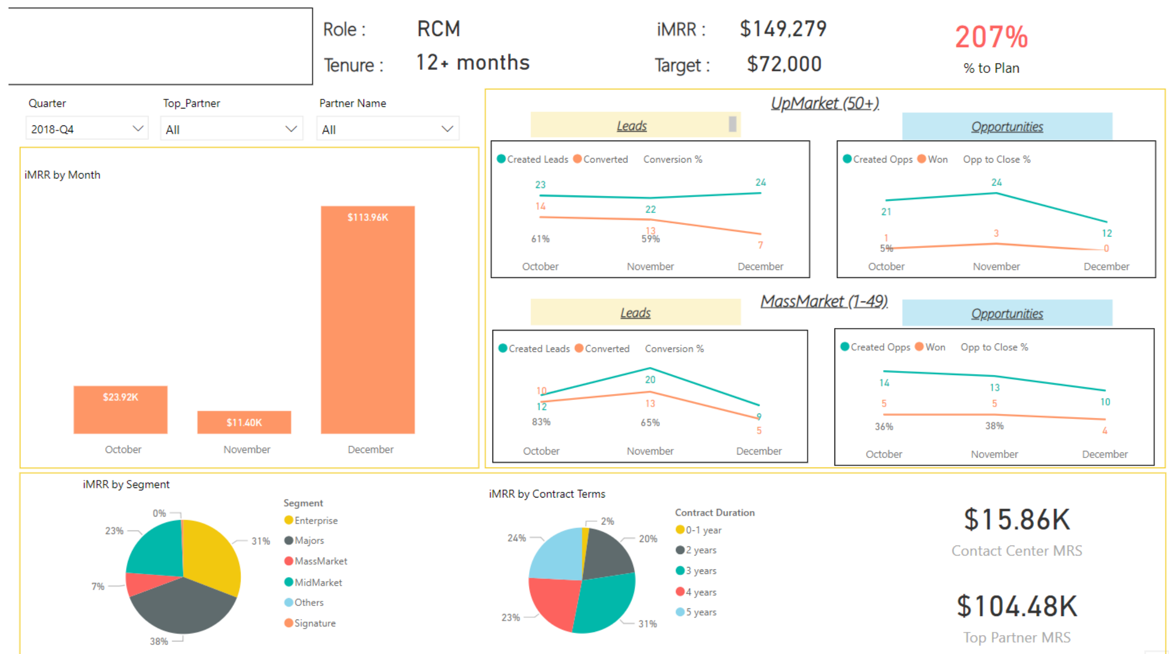
- To provide a single dashboard for all channel partner records tied to a channel manager.

Key tracking components

- Monthly iMRR by portfolio or by individual partner
- Upmarket & mass market lead segmentation
- Quota plan & percent to plan
- Individual partner pipeline data with historical reporting
- Opportunity by product type like RingCentral Office and Contact Center

Best Practices

- Keep track of the pipeline of your top partners and track changes in behavior daily
- Run reports on top partners to keep partners up to date on their RingCentral success
- Create reports for your partners to keep them up to speed on their business activity with RingCentral



Channel Managers Link | Director's Link

Questions? Feel free to reach out to Channel Ops: channel.ops@ringcentral.com

Channel Manager Scorecard

Purpose

- To provide a stack ranking of channel managers based on assigned partners and program fundamentals.

Key tracking components

- iMRR attainment
- Number of activated partners
- Number of top partner certifications
- Number of top partners with RingCentral logo on their website
- Number of top partners with a demo account
- Lead activity separated by segment

Best Practices

- There is a strong positive correlation between a channel manager's stack ranking and % to plan.
- Focus on having your partners complete the KPIs to increase your partner score.
- Seek coaching from channel managers who consistently rank high on leads and opportunities to increase your ranking.

Legend
Above 75% of Quota
At least 65% of Quota
Below 65% of Quota

Quarter
2018 Q4
2018 Q3

Director/Manager
Brian Bitler
Dean Young
Mike Day
Richard Orellana
Rob Shelby
Shaine Sulit

Tenure
0-6 mos
12+ mos
6-12 mos

Role
CAM
ICM
RCM

Channel Manager Performance

QTD Q4 2018 Results
as of December 31

Role	Name	iMRR Attainment	Top Partner Score	Activated Partners	Leads: 50+	Leads: 1-49	Opps: 50+	Opps: 1-49
RCM	Andrew Stauble	$20,020	32.0	9	39	31	42	23
	Bryan Stanley	$60,851	35.0	11	55	106	43	87
	Camden Patterson	$29,795	36.0	13	57	68	37	28
	Chuck Treisch	$29,632	35.0	13	25	15	21	12
	Damon Kearns	$15,715	32.0	6	14	39	14	36
	Danielle Pickens	$174,692	37.0	3	35	59	28	59
	Darrin Bryant	$75,671	35.0	23	50	44	45	37
	Della Pretzer	$2,456	23.0	5	14	25	9	22
	Doug Starzak	$153,895	43.0	6	78	50	67	41
	Dylan Riley	$131,996	37.0	7	60	72	50	51
	George Pappas	$18,912	41.0	10	66	56	51	38
	Harry Sangha	$27,568	35.0	13	36	49	30	33
	Jason S Miller	$73,945	30.0	8	32	44	27	26
	Jayson Smith	$112,376	37.0	5	62	63	63	45
	Jeff Jolliffe	$3,667	27.0	10	9	26	8	16
	Jessica Moore	$39,317	32.0	13	36	71	24	42
	Joey Savoie	$56,876	42.0	10	16	32	12	25
	Joshua Byrd	$25,896	30.0	3	16	30	14	21
	Kevin Barry	$90,741	40.0	6	36	42	31	33
	Larry Crabtree	$142,442	44.0	1	65	48	37	39
	Mark Anderson	$15,954	11.0	7	10	26	11	23
	Mark Mohr	$7,374	38.0	6	10	32	9	18
	Matt Hibar	$14,087	21.0	10	6	19	3	16
	Melanie Calabretti	$27,546	40.0	7	41	49	43	35
	Michael Kaspar	$3,975	23.0	13	32	132	18	40
	Michael Zurn	$149,279	36.0	12	52	58	53	41
	Tim Newman	$86,021	39.0	2	67	72	65	58
ICM	Dante White	$30,538	74.0	15	39	92	27	66
	Erika Schmidt	$25,741	72.0	25	17	50	9	43
	Katie Gompert	$17,376	76.0	24	11	52	9	41

ScoreCard Summary | Top Partners | Newly Activated Partners | Leads \| 50+ | Leads \| 1-49 | Opps \| 50+ | Opps \| 1-49

Questions? Feel free to reach out to Channel Ops: channel.ops@ringcentral.com

Top Partner Participation Report

Purpose

- To provide a stack ranking of partner contribution in the Channel Harmony sales process.

Key tracking components

- Stack ranking of your top partners' current pipeline booking value.
- Statistics broken out by lead, opportunity and closed sales.

Best Practices

- Use pipeline trends to focus your interaction on your top partners.
- Identify gaps in the sales process to better understand the quality of partner leads.

EAST REGION CHANNEL MANAGERS - TOP 20 PARTNERS

Data as of December 31, 2018

					nMRR					Leads	Pipeline		
OVERALL CHANNEL (EAST)					$287,091	$485,248	$608,407	$477,097	$1,857,844				
Rank	Partner ID	Partner Name	Channel Manager	Partner Activation Date	Q1 2018	Q2 2018	Q3 2018	Q4 2018	2018 YTD	2018 YTD	2018 YTD	Q4 Transacting Top Partners	Q4 Participating Top Partners
Top 20 |					18%	37%	17%	22%	24%			87%	13
					$52,689	**$179,457**	**$101,238**	**$104,529**	**$437,912**	**283**	**$21,633,529**		
1	41834			9/21/2016	$10,679	$37,782	$75,789	$25,963	$150,213	75	$8,448,071		
2	37156			9/10/2013	-$3,659	$25,615	$1,292	$83	$23,331	18	$760,334		
3	55399			6/28/2018	$0	$0	$0	$365	$365	8	$2,161,409		
4	49805			6/21/2016	$2,310	$1,020	$565	$49,947	$53,842	26	$2,213,537		
5	46901			6/11/2013	$123	$586	$734	-$130	$1,313	28	$437,906		
6	57873			1/2/2018	$0	$67	$639	$7,787	$8,494	5	$703,049		
7	46177			3/27/2017	$3,450	$502	$1,851	$1,168	$6,971	33	$255,568		
8	45282			4/21/2017	-$1,497	$5,098	$222	$578	$4,401	18	$129,675		
9	38093			5/3/2016	$53	$43	$1,028	$1,363	$2,487	5	$41,892		
10	17203			12/15/2014	$10,406	$1,372	$2,975	$3,621	$18,374	25	$1,217,082		
11	56443			8/14/2018	$0	$0	$0	$0	$0	5	$154,154		
12	41098			8/19/2016	$0	$0	$0	$0	$0	1	$20,999		
13	36136			2/9/2016	$4,076	$558	-$450	$245	$4,430	17	$1,698,997		
14	52016			1/5/2018	$26,395	$105,708	$15,348	$12,149	$159,600	15	$3,372,952		
15	50448			10/16/2017	$352	$1,105	$1,245	$1,389	$4,092	4	$17,904		
16													
17													
18													
19													
20													

Questions? Feel free to reach out to Channel Ops: channel.ops@ringcentral.com

Top 15/20/30 Partner Report

Purpose

- To provide a stack ranking based on metrics of top partner activity on KPIs and LGAs.

Key tracking components

- A stack ranking of your top partner information, as well as nMRS, leads, and pipeline per quarter accounting for duplicate PIDs

Channel Manager Responsibilities

- Channel Managers will need to update the orange-filled cell sections on a regular basis as needed.

Best Practices

- Use this report to gain validation of a partner's stack ranking and to justify any stack-rank changes.
- Identify partners who are demonstrating an increase in activity to place them appropriately within the stack ranking.

Ranking	Partner ID	Partner Name	Points	Master Agent	Partner Sign-Up Date	RC Preferred	RC Logo on Partner Website? Y/N	Does this partner use RC for their phone service? Y/N	Completed Certification training courses? Y/N	Date of Last Phone Call	Date Last Trained	Last F2F Visit (insert date of meeting)	Next Scheduled F2F Visit	Comments
4	42870	CrossVergence	22	Telarus	10/25/2016	Y	Y	N	Y	3/6/2019	3/13/2019	3/13/2019	3/7/2019	Strong partner, with a good pipeline that has bought
6	52372	Sendero Cloud	16	Avant - RO	1/24/2018	Y	Y	Y	Y	3/6/2019	3/19/2019	3/19/2019	3/6/2019	Working on several Mid-Market opps. Working very
8	55832	TechVAR LLC	13	Direct Partners - Upfront	7/24/2018	N	Y	Y	Y	2/25/2019	3/4/2019	3/4/2019	3/10/2019	Closed a nice 270 seat deal in September, with a cc
1	46522	A1 BizCom	25	Telarus	6/2/2017	Y	Y	Y	Y	3/8/2019	3/13/2019	3/13/2019	3/11/2019	Ruben is a strong RC advocate. Most deals are SM
7	43372	Technology Pointe	16	Telarus	11/11/2016	Y	N	Y	N	3/8/2019	2/28/2019	2/28/2019	2/28/2019	MSP that focuses on outsourced IT departments. S
2	47181	Metrix Solutions LLC	25	Ingram Micro - Residual C	5/23/2017	Y	Y	Y	Y	3/8/2019	3/5/2019	2/28/2019	3/5/2019	Growing partner, with discussions for a PCF in Q1 f
3	54164	GCS Technologies, Inc.	25	Sandler Partners - Sell Th	5/1/2018	Y	Y	Y	Y	3/8/2019	3/15/2019	2/27/2019	3/4/2019	Strong base of customers that are being marketed t
9	55299	Telco Data Inc	13	Telarus	6/22/2018	N	Y	Y	Y	2/28/2019	3/8/2019	3/8/2019	3/4/2019	Newly onboarded agent. Certs in progress. Closed
13	31953	Technology Cube LLC - MIGRATED	11	Ingram Micro - MSA	8/3/2015	N	N	Y	Y	3/5/2019	2/21/2019	2/1/2019	3/12/2019	Pending meeting to review 2019 UCaaS strategy. S
5	57986	BKTB Group, Inc., dba Mercury Communications of	20	MicroCorp, Inc.	10/11/2018	Y	N	N	Y	3/7/2019	3/18/2019	3/18/2019	3/6/2019	Newly onboarded agent. Certs completed. Closed
10	14095	SBS of SA, LLC	13	RS&I	3/29/2013	N	Y	Y	Y	2/27/2019	6/21/2018	12/21/2018	3/11/2019	Spoke with Frank to set up a meeting to dicuss UCa
11	55058	Technologent - South Texas	13	Sandler Partners - Residu	6/8/2018	N	Y	Y	Y	3/6/2019	5/23/2018	1/24/2019	2/28/2019	Minimal engagment from the team. Seem to be rea
14	59243	Arroyo 360	10	Avant - RO	12/4/2018	N	Y	N	Y	3/21/2019	3/21/2019	3/21/2019	3/7/2019	Looking into PCW /PCF/BDR campaign for Q2. Ne
15	46516	OnNet Resources, LLC	8	Telarus	11/28/2017	N	Y	N	N	3/11/2019	1/16/2019	1/23/2019	3/4/2019	Spoke with Damon Hall to set up a meeting to dicus
12	54662	The Apps Admin Company LLC	11	Intelisys	6/22/2018	N	Y	Y	Y	3/4/2019	2/27/2019	1/15/2019	3/19/2019	Jake is in Spain for the next 3 weeks. He is working

Questions? Feel free to reach out to Channel Ops: channel.ops@ringcentral.com

Unpacking the Top 15/20/30 Report

Ranking

- Give a 1-15/20/30 rank of your top partners

Partner ID

- Use the main partner ID associated with the partner

Points

- Use the appropriate (RCM or ICM) point scoring criteria and metrics located within the Channel Resources page
- See Top Partner Points Criteria within the Channel Sales Reports section of the partner portal

RC Preferred

- RingCentral is primary within their UCaaS Portfolio

Logo

- Use N/A designation only if a partner does not place logos on their website

Use RC as their phone service

- Only mark "Y" if this is their main phone system
- Use N/A designation only if a SME has presented and demoed the RC service and partner understands the discounts available.

Date of last call/trained/visit/next visit

- Enter the date associated with the respective activity

Comments

- A one-sentence update on the status of a KPI or an explanation of a gap in the report

Ranking	Partner ID	Partner Name	Points	Master Agent	Partner Sign-Up Date	RC Preferred	RC Logo on Partner Website? Y/N	Does this partner use RC for their phone service? Y/N	Completed Certification training courses? Y/N	Date of Last Phone Call	Date Last Trained	Last F2F Visit (insert date of meeting)	Next Scheduled F2F Visit	Comments
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Influencing & Managing Partners

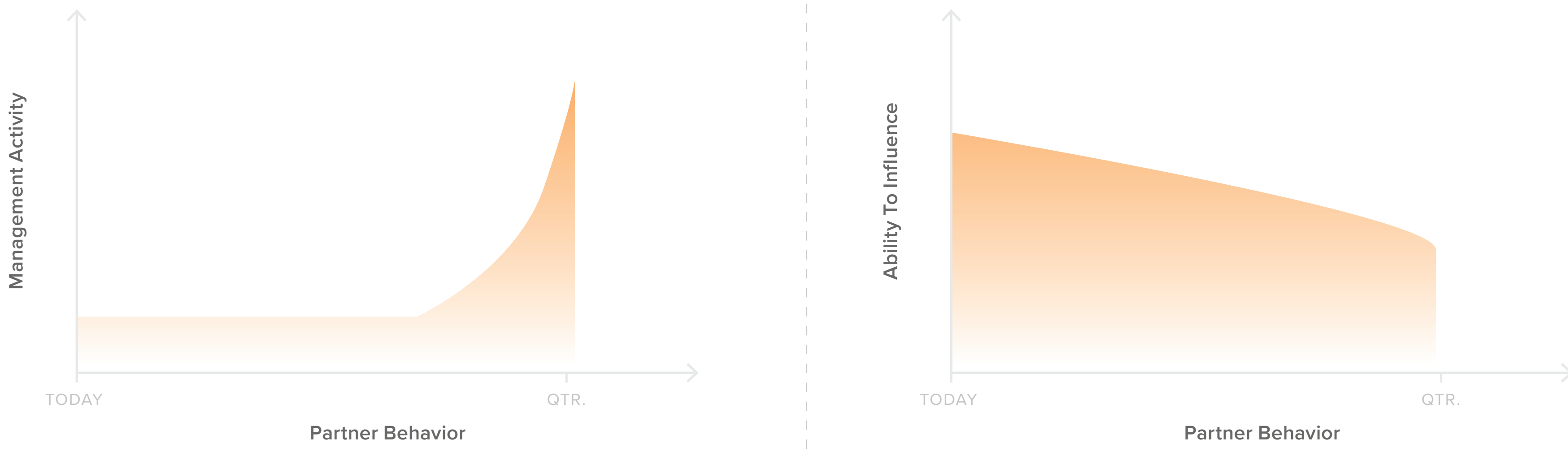
Influencing & Managing Partners

Reactive Managing vs. Proactive Coaching

Channel managers who are good influencers are good coaches. Good coaching helps develop your top partners, so be sure to build strong interpersonal relationships with your partners. Use the framework below to understand the difference between reactive managing and proactive coaching.

Maximize Influence Over Time

Reactive Management | Proactive Planning & Coaching



Unleash Your Leadership Potential

The "Unleash" program is RingCentral's leadership development program. All channel managers will be part of this at some point. New Channel Managers can expect to complete this workshop within their first year.

The program focuses on self-reflection and growth, learning your preferred communication style through your DiSC profile, and how to best communicate with others.

UYLP UNLEASH YOUR LEADERSHIP POTENTIAL

Powered by Entelechy

You will also be introduced to 3 key models:

- Feedback Model
- Coaching Model
- Difficult Conversations Model

The Feedback Model

Feedback is nothing more than continually clarifying expectations. Learning how to provide effective feedback ties directly to your results as a Channel Manager. Providing feedback to your partners about expectations and results only enhances the partnership.

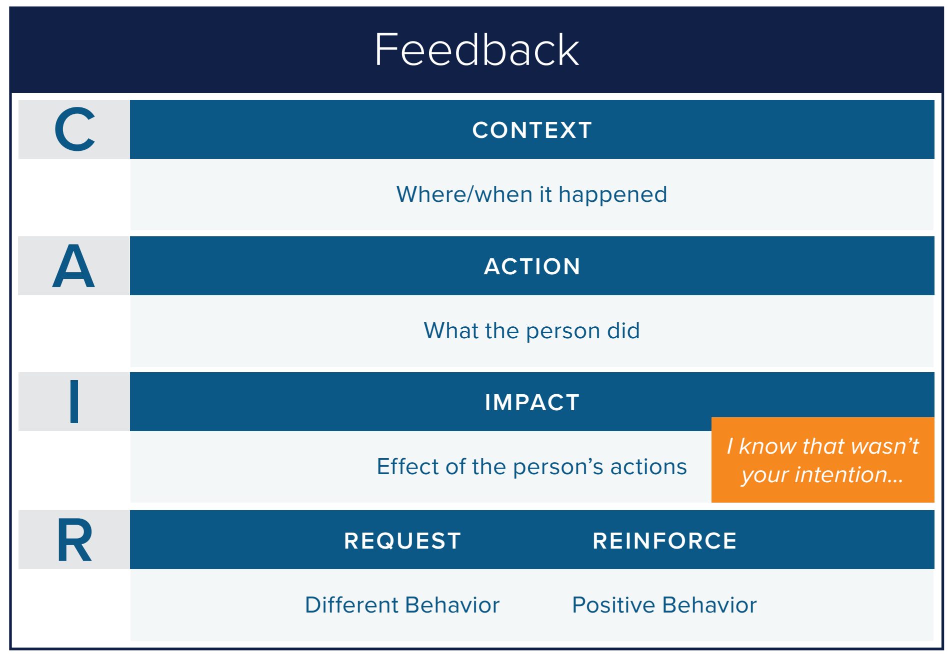
Remember, you can also ask your partners for feedback on your support, on our support materials, and on RingCentral as a partner. Then, provide follow-up to demonstrate your appreciation. Remember, Feedback is a Gift!

As you deliver feedback, be sure it is:

- Useful information that the other person does not have; no judgment
- Future-focused; not dwelling on past events
    - Use power phases such as "...to make it better next time..." and "...to make things more effective..."
- Solution-oriented and optional, using phrases such as "...you may want to consider trying..." and "Something that's worked for me and may work for you is..."

Additional elements of feedback to keep in mind are:

- Little things build into big things if unaddressed
- Build trust
- Remember POSTIVE feedback!



Using Coaching Skills in the Channel

What is coaching?

- Coaching is a two-way interactive process of communication, facilitation, and discovery.
  - Coaching happens between two people
  - Both parties must be willing participants
  - The process should be safe and predictable, sharing a common terminology, and ensures both people learn from the experience
- A commitment to superior performance, sustained improvement, and positive relationships
- Superior performance is the goal of coaching
- Sustained, ongoing improvement recognizes that we can always improve
- A commitment to positive relationships underlies the coaching philosophy

How can I use coaching as a channel manager?

- There will be times in our work with partners where the performance and partnership is not working as expected.
- When you know the partner is willing to improve, and is open to receiving your support, use the coaching model to structure the conversation
- Remember to ask questions, listen, and analyze to determine accuracy of self-assessment and clues
- Offer feedback if appropriate, and support and build on the good things!

Refer to your Unleash Your Leadership Potential participant guide and job aids for more information.

The Coaching Model

Coaching Conversation

OPEN THE CONVERSATION	WENT WELL?	DO DIFFERENTLY?	SUMMARIZE AND SUPPORT
• I know that you've been working on... How has it been going?	• What did you do that went well? • What else did you do that went well?	• What would you do differently? • What else would you do differently?	• Continue doing these things. Try doing these things. • Your efforts will pay off. If I can help... • Let's meet next...

LISTEN AND ANALYZE

SELF-ASSESSMENT

Accurate | Unclear | Inaccurate

SUPPORT & BUILD	EXPLORE	GUIDE	DEFER TO LATER
"I agree. That's really important because..."	"Why did you choose to do that?" "How did you know to do that?"	"What happened when you...?" **SHARE INSIGHT** "Something that works for me is..." "You may want to look at..." **PROVIDE FEEDBACK** "Would you welcome some feedback?"	"I'd like to talk about that in a bit. What else do you think went well"

Difficult Conversations Model

Why do I need this?

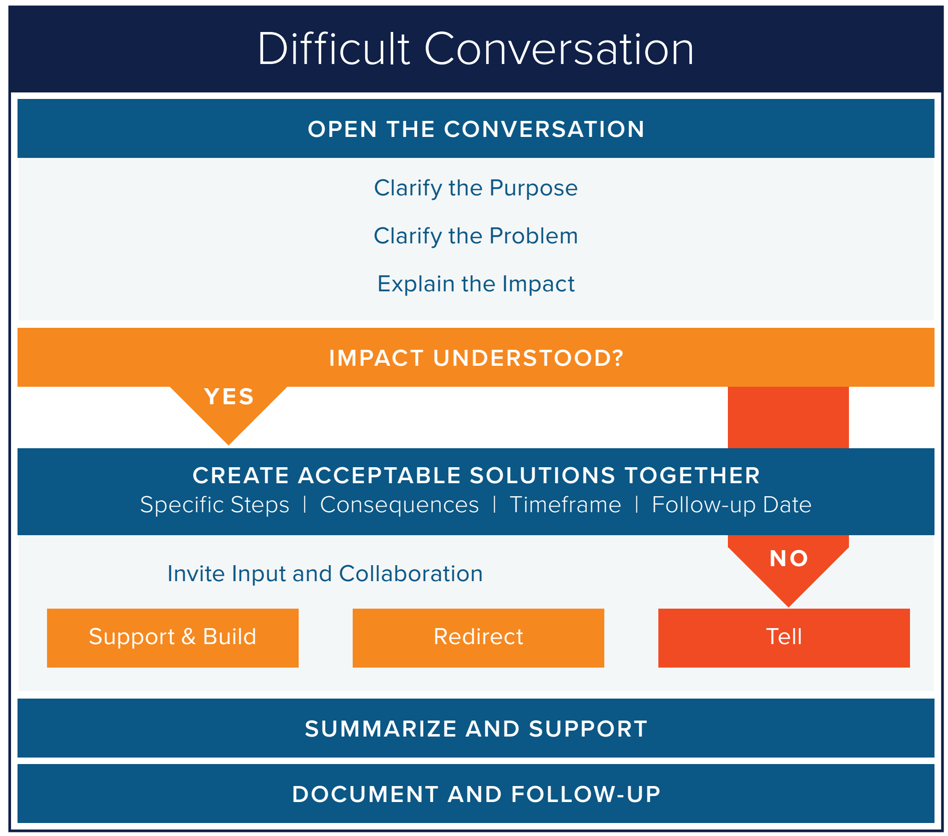
Ideally, of all the models, this will be the one you use the least. But experience tells us that not all partners will be a breeze to work with. They may begin to use some potentially damaging tactics with customers, or their performance will be such that the relationship must end.

In those cases, it's good to PLAN and PREPARE for a structured, documented discussion.

Keys to Handling Difficult Conversations

- Plan for it / expect it
- Acknowledge concerns or behavior
- Remain calm and poised
- Talk less and listen more
- Always treat the other person with dignity and professionalism

Refer to your Unleash Your Leadership Potential participant guide and job aids for more information.



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