

# Channel Plans



## Abstract

High value channel partner relationships are driven by goal alignment that is measured and rewarded. Easy to use and integrated channel plans offer enhancements to a process that has traditionally been ad hoc and informal.

## Description

Companies that collaboratively create joint business plans to align targets, expectations, geographic coverage, employee initiatives, and demand generation activities have longer lasting and more profitable relationships. Enabling a medium for cross channel planning helps companies identify each other's strengths and weaknesses to proactively take action.

Partners access channel plans through the partner portal where they create measurable objectives to achieve the overall plan goals. Channel managers review plan progress within salesforce.com and easily identify upcoming and overdue objectives.

## Highlights

| Name         | Description                                                                                                                                                                   | Type |
|--------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|
| Channel Plan | High level, time bound plan outlining joint vision statements and a roadmap for success. Channel plans are created for vendors and partners.                                  | ■ 🗂  |
| Objective    | Tangible and measurable steps to achieve the plans high level purpose. Each objective has a type, a start and end date, and metrics to quantify targets and achieved results. | ■ 🗂  |
| Channel Team | Assigns specific resources to a channel plan. Align resources with objectives, and provide a clear picture to partners of who their channel support team is.                  | ■    |

■ = Custom Object, 🗂 = Custom Tab, ● = Custom Link, ⬆ = Custom S-Control  
⌘ = Plug-In, ✕ = Composite Component

## Features & Benefits

- Best practice business planning tool designed for channel collaboration
- Maximize indirect partner revenue potential through goal alignment
- Develop win-win partner relationships & improve channel partner loyalty
- Proactively monitor plan progress through quantifiable objective metrics
- Link objectives to opportunities for powerful plan ROI analysis

## Key Reports & Dashboards

| Name                          | Description                                                                         |
|-------------------------------|-------------------------------------------------------------------------------------|
| Objective Stage By Partner    | Track partners progress in relation to achieving their objectives.                  |
| Overdue Objectives            | Show objectives that have passed their end date and do not have a completed status. |
| Objectives Due Within 30 Days | Highlights open objectives that are due to be completed in the next 30 days.        |
| Scorecards By Partner Plan    | Show where partners are in attaining their objectives.                              |

## Requirements

|                        |            |
|------------------------|------------|
| External Service       | None       |
| Salesforce.com Edition | Enterprise |

## Specifications

|                              |                |
|------------------------------|----------------|
| Publisher                    | salesforce.com |
| Type                         | Native         |
| Salesforce.com Certification | None           |
| Pricing                      | Free           |

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Screenshot

