UNIFIED RESOURCES, *Inc.*

Marketing Services

Aligning Sales & Marketing Strategies Across a Diverse Channel Partner Landscape

How implementing the Unified Channel Partner Portal (UCP[2]) as a corporate enterprise solution can unify channel partner resources with your company's continuously expanding marketing and sales initiatives.

Industry White Paper

Unified Resources, Inc.
Marketing Driven- Technology Focused

Aligning Sales & Marketing Strategies Across a Diverse Channel Partner Landscape
Page 1

Kenneth Ewing
June 17, 2013

Background

When it comes to market strategy, most companies classify themselves with a principal business model in one of two categories: Business to Business (B2B) or Business to Consumer (B2C). For many corporations, specifically manufacturers and marketers, this may be a very limiting perspective. A quick look at the distribution model of most manufacturers in today's marketplace reveals a model that is not solely B2B or B2C, but an intricate combination of the two. These B2B2C companies typically sell to one or more intermediaries before the manufactured product or service reaches the end user. This complex marketing strategy includes channel partners such as distributors, dealers, wholesalers, branches, brokers, retailers, franchisees and potentially other classifications of intermediaries.

In the increasingly competitive global marketplace, a B2B2C manufacturer must not only contend for the consumer's business, but also negotiate within the aggressive landscape of a multi-line reseller.

To stand out, it is critical for you as a manufacturer or marketer to cultivate relationships and a culture of advocacy with channel partners. By establishing a reputation of trust and continually providing a set of unified, brand-consistent support tools, you can incentivize your channel partners to cultivate that consumer relationship with and for you. This requires a unified strategy that offers consistency and flexibility, ultimately making it easy for them to do business with you.

Equipping the Channel Partner

In this complex marketplace, how can you succeed as a B2B2C manufacturer and achieve this culture? What tools and resources should you provide to motivate your channel partners to engage in a mutually beneficial brand and sales relationship?

Equip your channel partners with tools that enable them to easily, efficiently and precisely do business with you.

A channel partner that is reselling your product or service to the consumer serves as your face and front line sales and marketing arm. Serving as local brand ambassadors and selling agents, these partners are critical assets in your sales and marketing strategy. This can create a challenge for your corporate marketing and sales department to maintain a consistent brand message and sales strategy while preserving the customer experience in the local marketplace. To effectively communicate your unique selling proposition, it is essential to equip these local channel partners with the necessary branding, marketing initiatives, sales processes and pricing strategies.

Understanding how your channel partners fit within your marketing strategy provides a number of challenges. Here are critical questions B2B2C manufacturers/marketers must be able to answer for their channel strategy:

- How do the customer demographics and geographic footprint of our channel partners fit into our overall marketing strategies?
- Which products are successful within that geography and demographic?
- How do we incentivize channel partners to market our products and services over competitive offerings?
- How do we track, maintain and fulfill a variety of marketing and performance programs across a range of geography and intermediary types?
- How do we provide our channel partners with the resources needed to successfully plan and execute these marketing strategies and performance programs through collaborative efforts?

A variety of enterprise solutions provide a framework for developing and managing a number of sales and marketing initiatives that include:

Brand Support Programs

Providing channel partners with the necessary marketing tools to successfully communicate your brand message, these programs encompass:

- Signage programs
- Branded merchandise programs
- POP programs
- Printed products programs
- Co-branded materials programs
- Company store programs
- Store décor/ environmental graphics programs

Performance Programs

Recognized as the core of a channel partner's marketing tool kit, these programs equip a partner with sponsored branding/marketing funds and incentives. These programs are a critical component in effectively communicating your brand message through the partner to the consumer-–in the partner's geographic footprint. Common performance programs include:

- Advertising co-op programs
- Accrual programs
- Loyalty programs
- Best practices programs

Promotions

Supporting channel partners through trade-specific and consumer-oriented promotions helps you stand out in a crowded marketplace while collecting valuable user data. Promotions may include items from brand support programs such as:

- Advertising specialties
- Branded merchandise
- Displays
- Incentive and reward points
- Consumer and Trade Rebates
- Consumer Sweepstakes

Business Plan Generator

Providing business plan development tools offers an opportunity for you to align channel partners with sales goals and marketing objectives. Business plan generators also capture useful partner data including contacts within the company, competitive lines and markets served.

Market Share Tracking

Through industry and consumer Enterprise Resources Planning (ERP) data, market share tracking provides perspective to channel partners and an accurate snapshot of where they stand within their market. This data can help you and your channel partner identify growth opportunities and areas of saturation and determine how to allocate marketing resources.

Customer Relationship Management (CRM) and Lead Distribution

CRM tools provide channel partners with a system to manage their interactions with customers and prospects and can be utilized with a sales force separated by consumer demographics and geography. Unifying your sales process through an enterprise quality CRM system synchronizes and aligns your ideal sales and marketing processes across a disconnected channel base.

Marketing Communications (MARCOM)

To equip your channel partner with up-to-date sales and marketing strategies and creative assets, providing the most relevant MARCOM is crucial. MARCOM tools can also be provided through CRM services.

Unified Resources, Inc.
Marketing Driven- Technology Focused

Aligning Sales & Marketing Strategies Across a Diverse Channel Partner Landscape
Page 4

Kenneth Ewing
June 17, 2013

Marketing Asset Management

Utilizing an electronic repository to track the distribution and use of your approved marketing assets, this tool ideally includes on-demand, add-on capabilities and customizable signage/POP materials. Commonly tracked assets include logos, images and customizable, pre-approved templates for:

- Billboard signage
- Print materials
- Collateral
- Advertising
- Direct mail, TV and radio advertisements

Web-Based Learning Management Systems (LMS)

A series of self-placed, hands-on and mobile-accessible web courses, LMS tools provide updates on new product rollouts, campaign launches and sales training through a direct information stream to the channel partner. These systems function as a communication tool to keep your sales partners up to date with the latest product information, sales processes and marketing initiatives, and serve as a valuable resource for training partners on the latest industry standards.

Sales Forecast Tools

Providing your channel partners with the platform and data needed to forecast quarterly and annual sales is a valuable tool to help close the sales loop. Good forecasting tools give partners the ability to report historic sales data as well as past and current market conditions. Great forecasting tools combine and display this data while allowing partners to input forecasting data, track progress and adjust through each sales period.

Proposal Generator

These tools are PC, intranet, or web-based platforms that allow users (sales personnel, distributors, or dealers) to create professional presentations customized for your channel partner's organization and its client(s). Proposal generators make it easy to develop custom, personalized proposals while maintaining product and brand consistency.

Custom Cost Calculators

It's not unusual to discover that your channel partners carry multiple lines, requiring multiple price sheets and books. Easy-to-use cost calculators assist your partners and help you succeed. Providing a tool with company-specific business logic and cost calculators ensures your partners have current, accurate and complete pricing and discount information.

Unified Resources, Inc.
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Aligning Sales & Marketing Strategies Across a Diverse Channel Partner Landscape
Page 5

Kenneth Ewing
June 17, 2013

Dealer Locator

Connecting prospective consumers with dealer and retail channel partners is an effective tool that benefits both you and your partners. By taking an active role in the marketing support of channel partners, you create opportunities for new conversions and demonstrate your commitment and confidence in the sales support your partners provide.

Online Merchandising and Brand Support Materials

Online merchandising is essential in today's technology-driven marketplace. Channel partners need an easily accessible, user-friendly, online resource to quickly order your marketing and branding materials.

Online Product Ordering/ Accounts Payable

Providing channel partners with access to an online Enterprise Resource Planning (ERP) system for ordering and payables should be a basic requirement for all of your partnerships.

Dynamic Reporting Tools

It's all about the data. Many channel partners request dynamic reporting systems to help them measure their utilization and participation in manufacturer-sponsored programs. A robust reporting system that transcends all business transactions can be somewhat challenging if solution systems do not communicate.
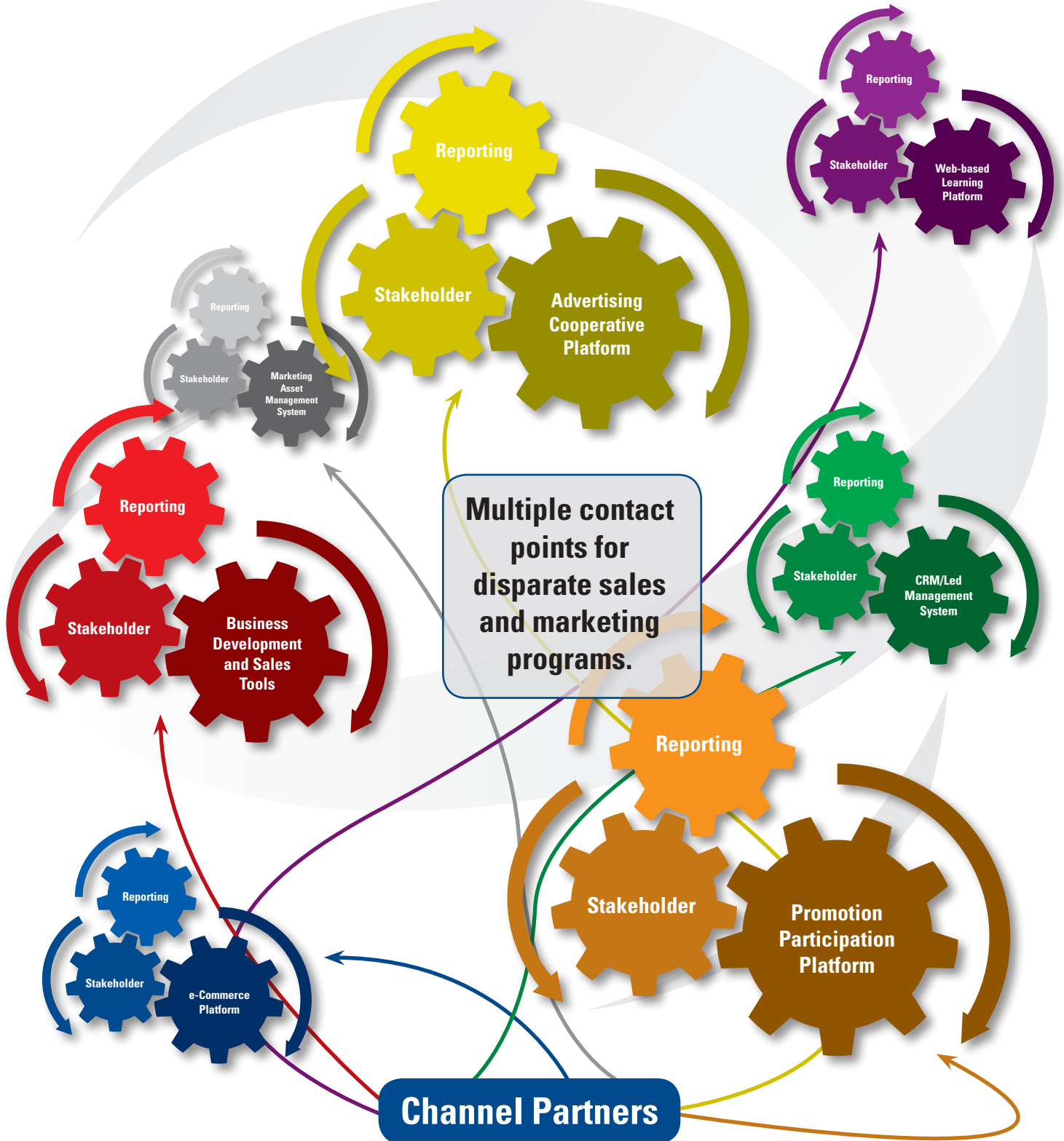
Challenges in Developing Cohesive Programs & Marketing Tools

With so many available tools, it's easy to see how offering such a broad array of support for a channel partner group could require extensive overhead investments, plus a variety of stakeholders and support teams with different responsibilities. Organizations can quickly realize the need to utilize third-party vendors to provide the supporting tools and resources their channel partners require. In turn, each stakeholder could require its own group of program providers and vendors to accomplish program responsibilities. Even in situations where the human and capital resources for the design, development, implementation and support of robust enterprise-level programs are available, the gradual expansion in the size and scope of individual programs can lead to redundancy and inefficiencies across multiple areas of service.

Uncoordinated programs can work against or contradict each other, creating the possibility for frustrated and confused channel partners. If your partners have numerous points of contact with stakeholders and a scattered support system, it can complicate even the most necessary and simplest transactions. Couple this with a multi-line channel partner who works with various other manufacturers, and their own unique marketing initiatives, and what began with the best intention becomes a complex network of misaligned, non-uniform marketing and sales strategy.

Unified Resources, Inc.
Marketing Driven- Technology Focused

Aligning Sales & Marketing Strategies Across a Diverse Channel Partner Landscape
Page 6

Kenneth Ewing
June 17, 2013

- Scattered technologies and multiple systems utilized by individual stakeholders and many vendor partners can cause channel partner frustration and cripple an organization.
- The uncoordinated programs and multiple contact points can work against or contradict each other creating the possibility of aggravating and confusing channel partners.

Unified Resources, Inc.
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Aligning Sales & Marketing Strategies Across a Diverse Channel Partner Landscape
Page 7

Kenneth Ewing
June 17, 2013

Room for Improvement

What if these tools were combined into one easy-to-use web-based, customizable portal?

What if this unified resource was intuitive, requiring minimal training, and provided customer service for your channel partners?

How would your current sales and marketing strategies benefit by providing your channel partners with the ability to:

- Order sales and branding tools
- Participate in performance programs and promotions
- Develop a business plan
- Measure market share
- Learn about best sales practices
- Utilize a uniform CRM tool
- Participate in advertising and promotion campaigns
- Order product
- Pay invoices

The Unified Solution of UCP^2: Growing Sales, Relationships & Opportunities, Ultimately Creating an "Easy to do Business with" Culture

Through a single sign-on portal, UCP^2 offers your channel partners these abilities while providing the most up-to-date and relevant manufacturer-provided information. This unique framework also allows your internal program stakeholders to assist multiple vendors in support of all channel partners. As a web-based resource, UCP^2 improves channel partner interactions by streamlining communications, providing visually interactive data and integrating collaborative sales and marketing efforts.

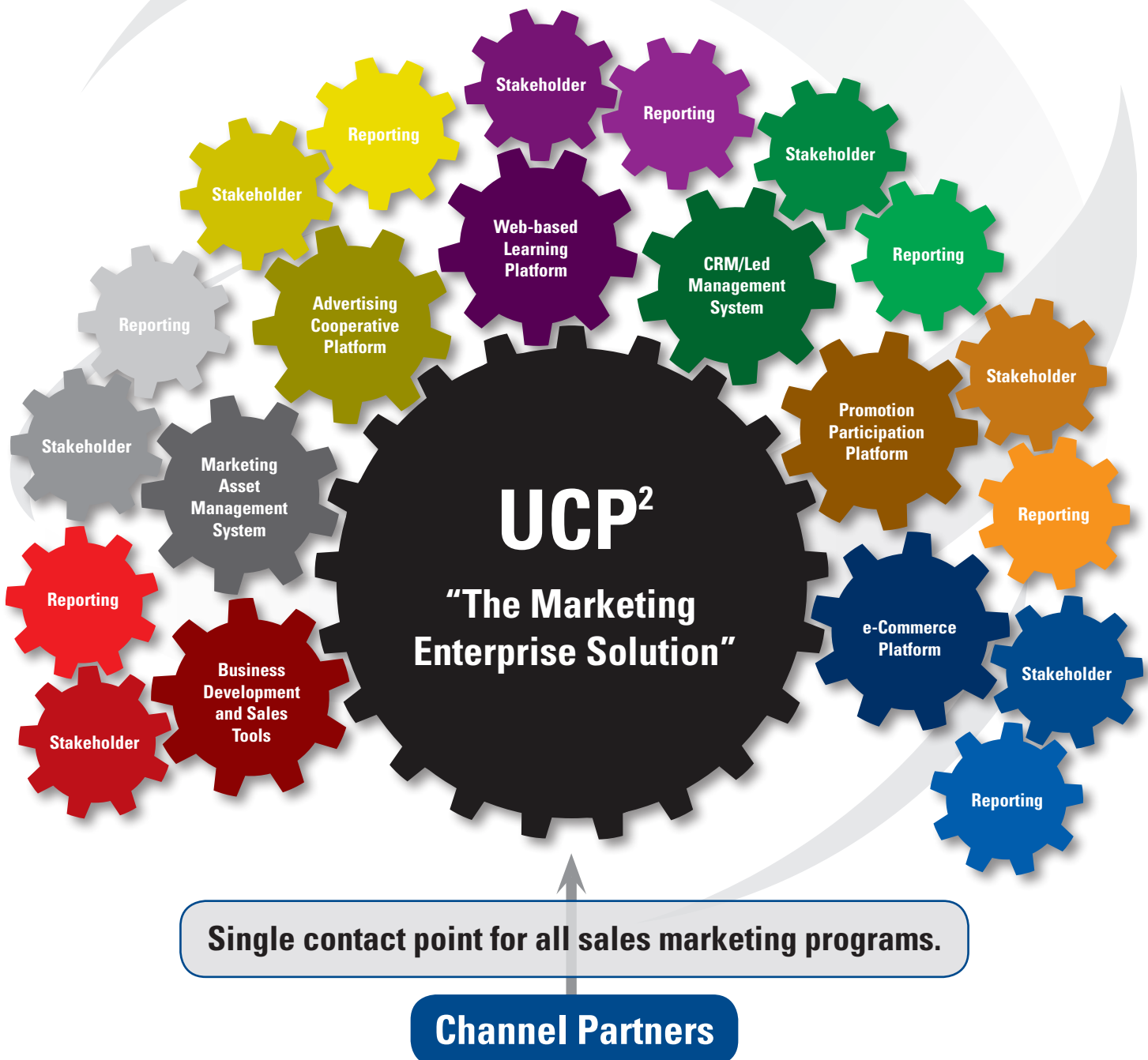### Unifying Marketing & Sales Strategies for Your Channel Partner Community

UCP^2 is a customizable, dynamic, web 2.0 sales and marketing support portal that transforms, refreshes and integrates into your existing channel partner program portals. Providing secure, single sign-on functionality, UCP^2 delivers access to the resources your organization needs to efficiently support channel partners, while offering the flexibility and collaboration of linking to existing enterprise solution systems. Alternatively, for companies looking to consolidate their current program portals or that are searching the market for a more robust, all-in-one enterprise solution suite, we can design and create a unified resource to include all channel partners.

Serving as an interactive hub, UCP^2 connects all essential business processes and enterprise solutions by providing users immediate access to aggregate information across multiple programs.

Unified Channel Partner Portal (UCP²) establishes the Marketing Enterprise Solution that provides a single platform for all channel partner interactions, ultimately creating an: "Easy to Do Business with Culture"

- UCP² combines an organization's marketing tools into one easy-to-use web-based, customizable portal.
- The UCP² Marketing Enterprise Solution provides a unified resource that is intuitive, requires minimal training, and provides customer service to your channel partners.
- When combining multiple marketing platforms under a single portal UCP² can provide channel partner analytics of key performance indicators that correlate to an organization's business goals
- By unifying platforms in the UCP² executive summary style reports can be created that consolidate multiple marketing platforms

Single contact point for all sales marketing programs.

Channel Partners

Unified Resources, Inc.
Marketing Driven- Technology Focused

Aligning Sales & Marketing Strategies Across a Diverse Channel Partner Landscape
Page 9

Kenneth Ewing
June 17, 2013

A Customized Partner Portal to Fit Your Needs

No two UCP^2 resources are created the same. The team behind your UCP^2 solution recognizes that your organization's needs and objectives are unique. Your UCP^2 is built from a common codebase with customizable look-and-feel features to best suit your branding needs. To ensure the most consistent, brand compliant and friendly User Experience (UX) and User Interface (UI), our team of developers and consultants take the time needed to understand:

• How different users engage in your company's sales and marketing practices
• What information they require or need to successfully participate in and grow your current sales and marketing efforts
• The application tools and frequency needed for a partner to be effectively engaged in your company's sales and marketing efforts
• The interactions your channel partner engages in with your organization and how often

Using this information, we create a custom solution focused on increasing communication, efficiency, productivity and profitability. Before beginning any development, we place a priority on understanding your business and the unique value your marketing and sales strategies bring to your industry's market. Our intent is to provide portal resources that increase program engagement by consolidating relevant resources that support, supplement and grow your company's sales and marketing efforts.

Because we understand that department and program stakeholders have different requirements and responsibilities, we custom fit the best solution for you. UCP^2 allows different stakeholders and trusted third-party vendor partners to manage various components, while driving channel partners to a single source of interaction with you. By providing a centralized, shared, unified technology and information resource, you establish a reputation as a trusted partner among your channel partners. Stakeholders and partners can streamline a consistent business process while:

• Gaining market insights
• Setting, tracking and measuring performance metrics
• Helping grow sales, relationships and opportunities

UCP² – Channel Partner Profile Database and Management System

Channel Partner Profile

Because keeping current, relevant data and contact information on your channel partner is challenging, UCP² was developed with a robust channel partner management system. Utilizing customizable forms, UCP² collects and stores the data that is important to your organization including basic contact information, critical personnel information and lines carried. This data can be analyzed for grading partner strengths as well as identifying areas of improvement and growth opportunities.

The UCP² Channel Partner Profile System is easily customizable to your specific need for data collection. To ensure profile information is up to date, UCP² has the ability to require the channel partner to provide profile updates upon login. This enhancement ensures critical contact and partner information remains current.

Channel Partner Database

The UCP² Channel Partner Database is a web-based system of record that houses profile data and additional partner information. Using web services, the UCP² Channel Partner Database pushes and pulls partner information to and from other data collection software tools and then parses, sorts and filters only the information relevant to a specific partner. In addition, the UCP² Channel Partner Database associates and maps channel partners to your organization's appropriate sales structure. This functionality allows easy data use and analysis for sales and marketing efforts within specific sales territories or partner classifications and provides UCP² administrators with access to critical channel partner information any time and anywhere.

Channel Partner Management System

The UCP² Channel Partner Management System supports the Channel Partner Database and manages the communication of partner updates to designated parties through a template notification system. Templates are created, saved and when triggered, automatically distribute the appropriate communication to internal and third parties with an up-to-date list of the partner database.

The UCP² Channel Partner Management System is intended to streamline the process and communication of:

- Setting up partners
- Editing/updating partner information
- Removing/terminating partners
- Notifying appropriate parties of changes

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Marketing Driven- Technology Focused

Aligning Sales & Marketing Strategies Across a Diverse Channel Partner Landscape
Page 11

Kenneth Ewing
June 17, 2013

UCP² - Content Management Tools

To quickly make critical changes to portal content, UCP² offers a comprehensive, integrated content management platform that enables an administrator to keep the content fresh and relevant to users, alleviating the need for in-house or contract developers. The UCP² administrator can update dashboard content, upload multimedia, create and post articles, build micro-sites, manage enterprise links and distribute email blasts to users by classification.

By providing the administrator a great deal of control over the portal, UCP² ultimately results in cost savings, convenience and improved interaction with users.

UCP² - Channel Partner View and Capabilities

Upon login, each channel partner can review your key performance indicators (KPIs). Channel partners can view a snapshot of KPIs including, but not limited to, market share, co-op utilization, program participation, sales progress and much more.

UCP² also serves as a communication hub for all relevant information for the channel partner. This information can include product updates, promotion announcements and other information important to the partner relationship. Channel partners can engage in and track progress in any areas you designate including:

- Training
- Program participation
- Sales penetration
- Close rate
- Order history
- Custom KPIs

Channel partners have the ability to set up and manage internal users. Each internal user is created with a unique login and permission associated with the partner master login. These users can be classified with certain function types such as:

- Sales
- Marketing
- Accounting
- Administration

Unified Resources, Inc.
Marketing Driven- Technology Focused

Aligning Sales & Marketing Strategies Across a Diverse Channel Partner Landscape
Page 12

Kenneth Ewing
June 17, 2013

Conclusion

Scattered technologies and multiple systems utilized by individual stakeholders and many vendor partners can cripple a growing organization. The winning approach is a unified solution that brings stakeholders and vendor partners together to support channel partners through one single sign-on system.

More beneficial than a typical investment in technology, UCP[2] is an interactive, web-based platform and unified support system that creates the "easy to do business with" culture that is necessary for you as a manufacturer to stand out in a crowded channel marketplace.

UCP[2] is the consolidated solution that allows your manufacturing organization to manage, track and communicate with channel partners through measurable performance and participation in sales and marketing programs.

Integrated portal solutions can streamline support of your channel partners. To learn more, please contact Unified Resources, Inc. at 800-346-9041.

About Unified Resources, Inc.

As a marketing services company for over 3 decades, we have specialized in developing and implementing marketing programs in channel marketing. We have earned a reputation as an outstanding resource for critical and complex execution of ongoing marketing initiatives to distributors, wholesalers, retailers, dealers, branches or other channels in a marketing strategy. We are Marketing Driven – Technology Focused.

Our services include:

- **Fulfillment Services** - We manage signage, POP, printed product and merchandising and branded materials fulfillment programs.

- **Performance Programs** - Development and management of a variety of database-rich, transactional incentive and accrual programs. These programs typically include the management of channel account information, sales and goal data and related marketing communications.

- **Promotions** - Development and management from concept to execution, these promotions include advertising specialties, displays, loaders, loyalty/points rewards and trade rebates.

- **Creative Services/Print Management/Marketing Communications** - Employing a diverse creative staff, we specialize in functional and cost effective, creative solutions. We also have the talent to provide cutting-edge creativity for print and web.

- **Branding/Merchandising Systems Management** - Developing and managing complex engineered branding programs, we provide environmental graphics, merchandising and primary identification/store decor packages for retail.

- **Custom Technology Solutions** - In addition to developing technology solutions to support all of our services, we provide out-of-the-box thinking and innovative solutions for your marketing needs. Custom software development services include:

  - Company Store and Branding Platforms
  - Advertising Co-Op Platforms
  - Branding and Retail Solutions ID Mapping Software
  - Business Plan Generator
  - Custom Cost Calculators
  - Proposal Generators
  - Market Share Analytics
  - Marketing Communications (MARCOM) Tools
  - Digital Asset Management
  - Ad Builder Tools
  - Computer-based Training (CBT) Tools
  - Customer Relationship Management (CRM) & Lead Distribution Platforms
  - Sales Forecast Tools
  - Dealer Locator
  - ERP Bolt-ons

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Unified Resources, Inc.
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Aligning Sales & Marketing Strategies Across a Diverse Channel Partner Landscape
Page 14

Kenneth Ewing
June 17, 2013