

A vertical photograph of the Golden Gate Bridge at night, illuminated with warm orange lights. The bridge's towers and suspension cables are visible against a dark blue sky. In the background, the city lights of San Francisco are visible across the water.

Ecosystem Business Management Principles and Best Practices

How to bring together your Alliances and Channels to activate
a winning Partner Ecosystem and dominate your category

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EBOOK

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SECTION 1

The Market Demands Partner Ecosystems



A strong partner ecosystem can be a company's most potent weapon in today's hyper-competitive marketplace.

According to a recent Accenture survey, 84 percent of global executives say ecosystems are critical to their strategy and allow their organizations to grow in ways otherwise not possible. McKinsey just declared the age of "Ecosystem 2.0," stating that effective cross-industry ecosystems can add up to a \$60 trillion market by 2025. Now, that is a market expansion we all want to go after!

Yet, many organizations are stuck in the old way of managing partners by "types" and "tiers," and operating siloed partner organizations independently of one another. For example, within the same company, one organization manages sell-through motions with channel partners, while others manage co-sell alliances, OEM, cloud, technology, service partners, etc.

When it comes to having the right tools for the job, while the channel team might have a partner portal to work with, the rest are left managing by spreadsheets, chewing gum, and baling wire. It's no way to run a business.



“76% of business leaders surveyed agree current business models will be unrecognizable in the next 5 years — ecosystems will be the main change agent”

Accenture:

“Cornerstone of Future Growth: Ecosystems”

The evolution to ecosystems has made it difficult for many companies to stay on top of fast-changing ecosystem motions, and the consequences can be severe. Often, partners are underleveraged and are now working more with competitors, so how to keep them engaged? Data is scattered, and the value partner organizations contribute is hidden from view, so how can value be surfaced? CEOs hear ecosystems are important, but they don't see it inside their organizations, so what will make it tangible?

At WorkSpan, we're fortunate to work with hundreds of ecosystem-powered organizations across different industries. There is one thing all of them have in common: a deep understanding that modern partnering requires an ecosystem mindset.

The old ways of managing partners in silos of channel partners, alliance partners, independent software vendors (ISVs), etc. no longer work. To master the modern ecosystem as an engine of solution innovation and revenue growth requires a fundamental shift in expectations and approach.



The Breakthrough in Ecosystem Thinking

Partnering has dramatically changed over the last 40 years. The days of one company building end-to-end solutions and then shipping boxes of CDs through distributors and value-added resellers (VARs) are long gone.

In today's world, digital solutions are assembled from multiple providers, connected through plug-and-play APIs, delivered in the cloud, and customized with managed services. This model has completely disrupted the old “sell-through” model of distributors, warehouses, and VARs.

To compete today, companies must understand and apply an ecosystem approach to managing their partner relationships.

So, what are some of the breakthroughs in ecosystem thinking?

- **Everyone is working together as “peer partners.”** Diverse and unique expertise means even the smallest players can play a lead role.
- **Partnering is more than 1 + 1.** To innovate and deliver complete solutions to customers, collaboration across multiple partners — 3 or more — is frequently required.
- **Traditional “partner type” labels are outdated and inaccurate.** VARs are becoming managed service providers (MSPs). Systems integrators (SIs) are productizing and bringing their own solutions to the market. And, hardware vendors are bundling solutions with cloud providers to create a brand-new distribution concept.



“The adoption of Ecosystem Business Management applications will establish common business practices, reduce redundancy, improve collaboration, and manage costs while maintaining a focused perspective of the desired customer experience.”

IDC Market Perspective:

“Ecosystem Business Management Concept and Capabilities”

-
- **Co-selling with partners is critical.** We can no longer rely on the old, sell-through channel business model. Traditional reseller models have been commoditized out of business, and low-margin VAR businesses have reinvented themselves by offering high-value services and co-selling with their partner field teams.

Modern partnering requires ecosystem thinking, tools, and approaches to transform our partnerships into vibrant, revenue-growth engines.



The 3 Principles of Ecosystem Partnering Success

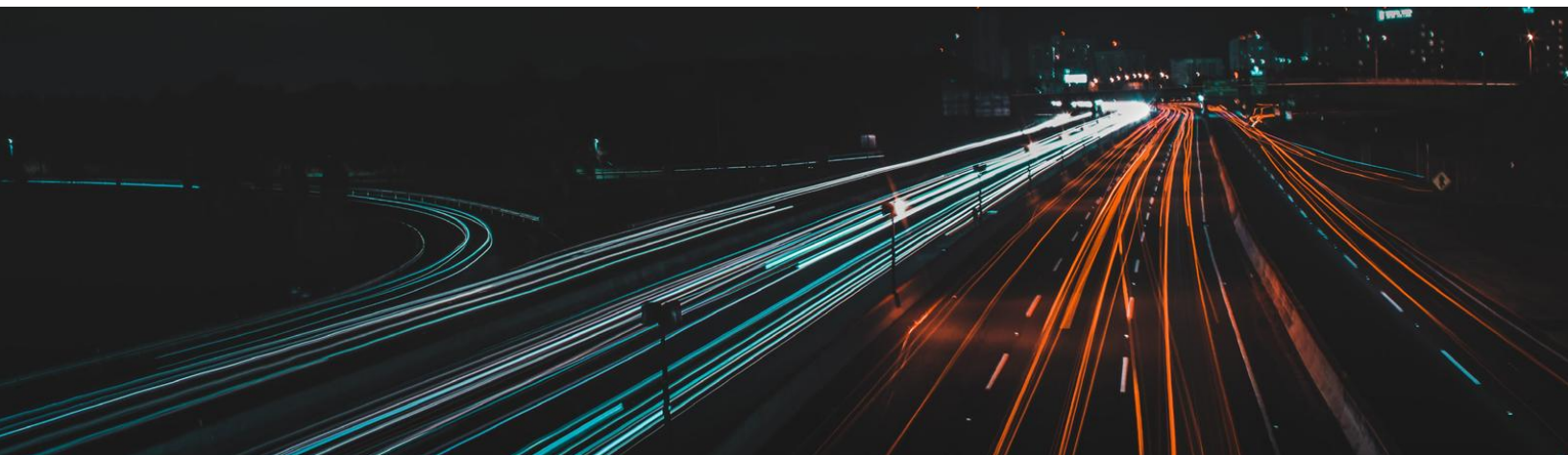
So, what are the foundational components of the transition from alliance thinking to ecosystem thinking?

1 | Digitize

Digitize your ecosystem. Digitize all your partnering processes, your collaborations, and your business reporting across all your partner types and initiatives. The changes in the way we work together, both with internal colleagues and external partners and customers, will be here long after the Coronavirus crisis.

Digitizing the way you work with your partners provides a platform to accelerate your partner motions across the globe to build solutions and drive revenue together. Digitization reduces or eliminates manual efforts, gets data to you and your partners faster, and streamlines modern ecosystem workflows seamlessly across company lines.

So much of the data partner programs run on — joint pipeline data, joint account planning, joint solutions development, joint marketing activities — has been locked in spreadsheets or slide presentations that live in someone's inbox. Don't squander valuable meeting time with partners by comparing data and updating action items. Use this time to build strategies to win the future rather than focus on what already happened.



2 | Connect

Did you know that the majority of announced partnerships fail? Between 60 and 75 percent aren't successful in the first 12 months, even when they seem to have the right ingredients in place.

This breakdown results from broken connections between people, processes, and data.

Connecting with your partners, inside and outside your company, to work together is more important today than ever before. When it comes to collaboration, shared cross-company workflows fuel well-defined business processes and help partner organizations work together more quickly and efficiently.

With connected data, manually chasing down spreadsheets is a thing of the past because your and your partners' critical program information is always fresh and accurate. Management is data-driven, teams respond quickly to shared opportunities, partner contributions connect directly to business impact, and accurate, timely reports facilitate analysis and strategic decision-making.

By connecting people, processes, and data to a shared system for executing with your partners, you quantify your partner programs and initiatives, hold your stakeholders accountable, and build trust in your business.



3 | Be Agile

With a digitized and connected partner ecosystem, real-time data, analysis, and collaboration digitally transform your partner business into a lean, agile engine of indirect revenue growth, able to navigate even the toughest market conditions confidently.

You can measure, manage, and deliver business results with the same precision, flexibility, and confidence as a direct sales organization. Grow revenue, speed time to market, and accelerate sales cycles as you lead your partner business into the future.



McKinsey
& Company

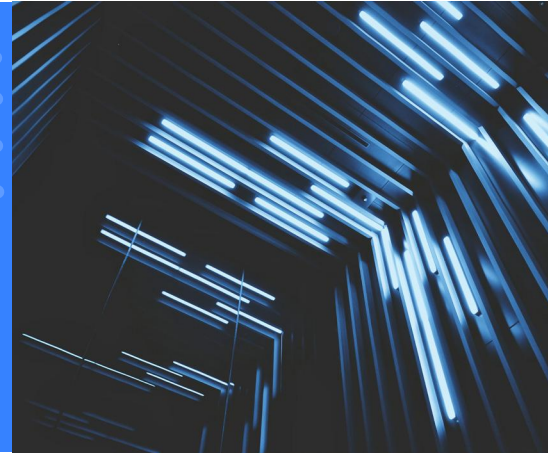
“We estimate that at least a dozen sectors, including B2B services, mobility, travel and hospitality, health, and housing, are reinventing themselves as vast ecosystems, networks of networks that could add up to a \$60 trillion integrated network economy by 2025.”

McKinsey Quarterly:

“Ecosystem 2.0: Climbing to the next level”

SECTION 2

Best Practices for Building a Winning Partner Ecosystem



We're fortunate to be in the unique position to work closely with the people and organizations at the forefront of ecosystem thought leadership and ecosystem business execution. We're very excited to share with you some of the best practices we have found to be pervasive across today's ecosystem leaders. Enjoy!

Best Practice #1: **Operationalize Co-Selling Across All Partner Models**

In today's world of ecosystem partnering, all of your partners — strategic, technology, systems integrator, services, cloud, communications, and channel — need to be aligned and working as one to co-sell your joint solutions. The days of different systems for different “partner types” are over.

Partner business models are morphing, and successful co-selling with partners is dependent on being flexible. Adopt modern tools and processes to empower and enable multi-partner sales business models — co-sell, re-sell, cross-sell, renewals, referrals, etc. — with shared views of joint opportunities and pipeline to fuel higher win rates, shorter sales cycles, and increased revenue.

For example, a software company is fighting an uphill battle managing joint sales opportunities with its various other ISV partners. With an ecosystem mindset, they move away from the constraints of their old partner relationship management tools and

collaborate with their partners on a shared system for status tracking, which quantifies and accounts for partner influence and contributions to revenue.

Best Practice #2:

Unlock Cross-Company Collaboration

Most partnerships fail within the first year — yes, that scary statistic is worth acknowledging. It makes sense considering building, approving, certifying, and deploying new shared solutions to the market is inefficient, prone to process breakdowns, and cripples speed to market.

Another scary statistic? Market development (MDF) programs typically leave 40% of funds unused.

The reasons behind troubles with launching joint solutions or managing MDF funds often boil down to a lack of consistent and standard processes across company boundaries. This concept applies to every partnering motion, including co-sell, co-build, OEM, and channel.

Digitized partner program workflows resolve many of these challenges. Imagine if you can run every MDF motion — proposals, proof of performance, reimbursements, compliance, reporting, etc. — all in a single collaboration space, visible and accessible to partners and stakeholders at all times.

With shared cross-company workflows, everyone knows and agrees on where things stand, what's next, and who's accountable. Connecting disparate program activities across partners becomes orderly, simple, and scales across your partner ecosystem.



“In a few short years, the ranking of most valuable companies by market capitalization has totally shifted to being dominated by one business model – digital platforms and ecosystems.”

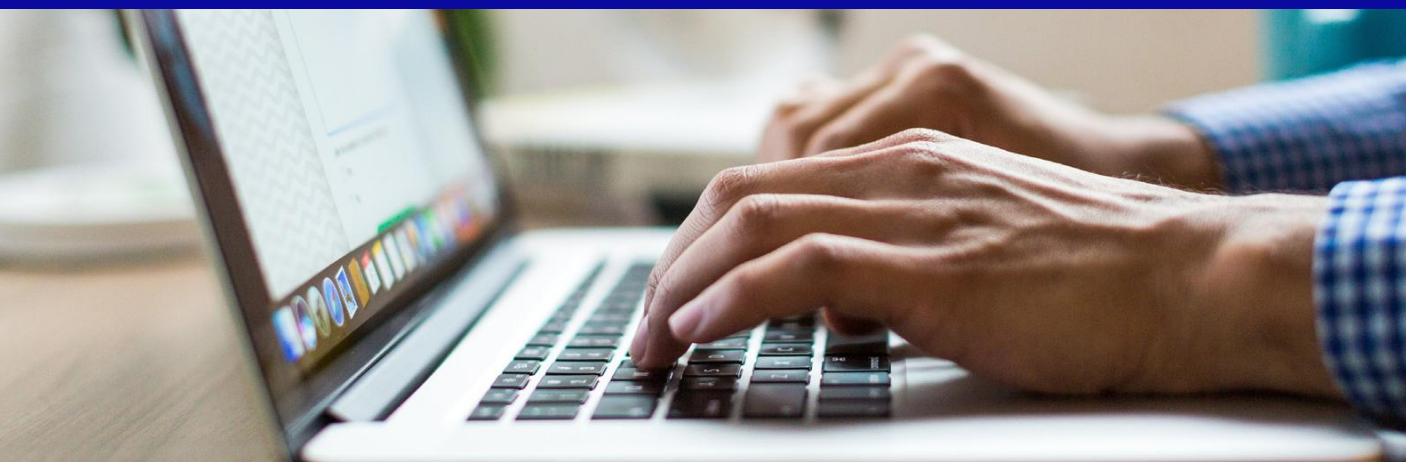
**World Economic Forum:
“Platforms and Ecosystems:
Enabling the Digital Economy”**

Best Practice #3:

Measure and Report Like a Direct Sales Team

If a partner-influenced deal closes and no one hears about it (or sees it tagged in the CRM), does it make a sound?

More than 60% of partner professionals see the evaluation of their success as a top concern. Not receiving credit for partner-generated opportunities is only one of the blind spots created by poor visibility.



An organization and its partners will also struggle to make informed decisions because they're routinely working with old data. Lack of coordination on this front will lead to issues like metrics being optimized for a particular region but not for the overall campaign's success.

End-to-end reporting spanning your entire partner ecosystem makes your partner collaborations really shine. Timely, trusted reporting delivers detailed looks at what does and doesn't work, and supports comprehensive KPI frameworks for your ecosystem business.

Place KPI metrics on your partner managers and partners — (a) partner manager and partner productivity, (b) partner sourced leads, pipeline, revenue, (c) partner influenced leads, pipeline, revenue, (d) win ratios, (e) average deal sizes, and (f) profitability.

Best Practice #4: **Harness the Power of Multi-Way Partnering**

Partnering is no longer a 1-on-1 relationship with a single partner. Today, you're managing go-to-market activities with 2, 3, or more, partners on a single large opportunity.

Traditionally, it is the channel partner's burden to facilitate partners to "meet in the channel." But as channel partners are getting disintermediated, or as SI partners and MSP partners gain control of the buying process for end customers, you have to control where you meet which partner in the customer's buying process. Delegating this important control point to your channel partner is not a sustainable strategy anymore.

Harness your entire partner ecosystem's influence and expertise — including cloud, ISV, IHV, SI, channel, and distributors — to close business faster. Today, trying to classify partners into types only slows down business by building artificial barriers between partners.

For example, an ISV company partners with an SI company to offer cloud software and services together as a single solution to their shared customers. Including a hyperscale cloud partner in a 3-way joint sales and solution collaboration adds not just technology





“The shift from a linear channel structure to a more interconnected and complex ecosystem will fundamentally disrupt the way the IT industry is structured.”

IDC Market Perspective:

“2020 Channels and Alliances Predictions”

and expertise, but can also add to the number of potential customers and increase the size of the addressable market.

With multi-way partnering, you can significantly expand your collective reach and seize many additional business opportunities. Make facilitating these kinds of multi-partner collaborations simple and easy for everyone, including yourself!



Best Practice #5:

Build Infrastructure for Pre-Pipeline

A strong pipeline requires an even stronger pre-pipeline of partner-qualified leads. However, partner managers usually have many different ways of managing and tracking their joint business.

Fragmented spreadsheets and methodologies make partner contributions virtually invisible at the pre-pipeline stage. Silos across different systems, solutions, and KPIs are a nightmare to reconcile across disparate spreadsheets. Once leads become actual pipeline opportunities, how is the information aligned across each partners' respective CRM systems?



A complete, accurate, and timely pre-pipeline is a powerful catalyst for sales growth. Healthy pre-pipeline processes engage partners in collaborative joint account planning, and focus energy on joint account nomination. With an aligned approach to pre-pipeline, you can share sales plays with your partners and get a headstart on attributing partner contributions to deals and revenue.

For example, with a proper foundation for pre-pipeline, a systems integrator aligns its pre-pipeline opportunities with its partners. Now, the SI has access to new deals it otherwise would never have been involved in and can truly influence and accelerate pipeline, sales, and ultimately, revenue.



**“IDC predicts that, by 2024,
those who adopt an ecosystem
business model will grow
50% faster than companies
that do not.”**

IDC Market Perspective:

**“Ecosystem Business Management
Concept and Capabilities”**

Best Practice #6: Source Innovation from Everywhere

Ecosystem innovation can be found among your partner companies but also thrives within your own. Have a process to receive and vet those innovative ideas!

Here's the truth: your field teams are your most vital innovation partner. The ideas that really stick come from field teams working with customers.

You can solicit outside-in ideas for joint solutions and even marketing campaign ideas directly from teams in the field in addition to your partners. This approach ensures an influx of new and innovative ideas to sustain your customer solution and marketing campaign engine.

For example, one Fortune 50 software company saw dividends using a recommendation engine across its partner's certified solutions, which identified the right solutions for each customer's business requirements. Less guesswork, reduced legwork, and more teamwork — going outside-in is the inside track to working smarter.

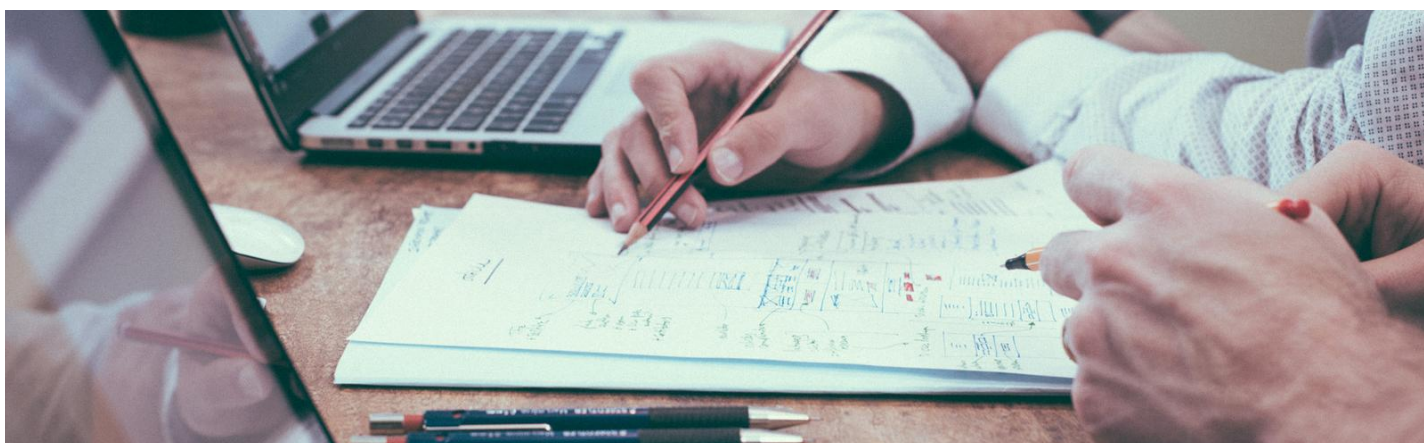


Best Practice #7:

Align Processes with Your Joint Solution Partners to Achieve Scale

Creating and launching joint solutions with your partners can sometimes feel like watching a TV series where every episode ends in a cliffhanger — “what happens next?!” is all anyone can think. Relieve the anxiety by bringing order to the chaos of creating and launching joint solutions with your partners.

Joint solution development is complicated, with processes crossing back and forth across companies. To stay aligned and on-track, cross-company workflows with built-in steps, owners, approvals, etc., are essential, especially when joint solution innovation is a frequently repeated motion. Too often, we reinvent processes for each new co-development project.



Circumvent disjointed processes for packaging and publishing joint solutions and prioritize aligning shared business processes that are well-designed and broadly understood, so the next steps and owners are clear.

For example, an ISV builds and launches joint solutions with its SI partners across its entire solution portfolio globally. They receive over 150 joint solution ideas from their partners, along with over 1,000 prospective customers for those solutions. So, not only are they getting new ideas, they are now engaged in joint sales cycles with their partners to drive revenue at scale!

Gartner®

“Gartner anticipates that disrupting the current [PRM] business models through building sales partner ecosystems will be a game changer.”

Gartner: “Market Guide for Partner Relationship Management Applications”

Best Practice #8:

Prioritize Data Security to Reduce Risk and Build Trust

Security is an afterthought in most partnering teams in their day-to-day execution. Spreadsheets and email are insecure — simple errors can have sensitive sales data accidentally in a competitor's hand and risk compliance violations, so security around data is critical to modern partnering.

Fine-grained security controls are essential when working with partner ecosystems where partner roles, contributions, and values delivered can be diverse and nuanced. Your data security policies must be simple to scale, or securely managing joint opportunities, sales plans, and solutions across your ecosystem become not just unwieldy, but impossible.

When working with data from critical business systems, such as CRMs, data access must be carefully segmented to share only what's relevant to each specific partner and each individual opportunity. Data access also becomes much more important and complex when partnering with not just one partner, but two or more, on a single opportunity.



Best Practice #9: Adopt a Shared System of Record for Partnering

Partner teams regularly drive one-third of all revenue and company valuation. Despite helping bring in major deals, partnering organizations are usually left under-appreciated and underfunded compared to sales, marketing, and business teams.

Why?



The answer is partner teams don't have a system to consistently execute on their partnering processes and quantify their impact to prove their value. Managing partnering activities with endless spreadsheets doesn't compare to how CRMs professionalize sales management, how marketing automation software systematically drives measurable MQLs, and how ERPs lock down business functions.

Senior leaders of partner organizations must have a way to represent the business' impact with the same accuracy and credibility as the direct sales force. Compared to direct sales, modern partnering is more diverse, more complex, and requires a unified system of record spanning across companies from which to manage everything from end to end.

With a single system of record, organizations have one go-to place for all their partnering motions — a dependable platform for collaborating with partners and reporting reliably, accurately, and comprehensively.

FORRESTER®

“Ecosystem growth requires automation. With the rapidly shifting partner landscape, channel leaders and B2B marketers can no longer succeed with manual human-centric processes and reliance on spreadsheets to manage their partner programs.”

Forrester: “Channel Software Tech Stack 2020”

For example, an ISV works with all its SI partners on their joint sales initiatives from a single, shared platform. The outcome? Together, they are all transformed into a performance-driven organization growing pipeline, driving revenue, and clearly demonstrating the value of the partnership.





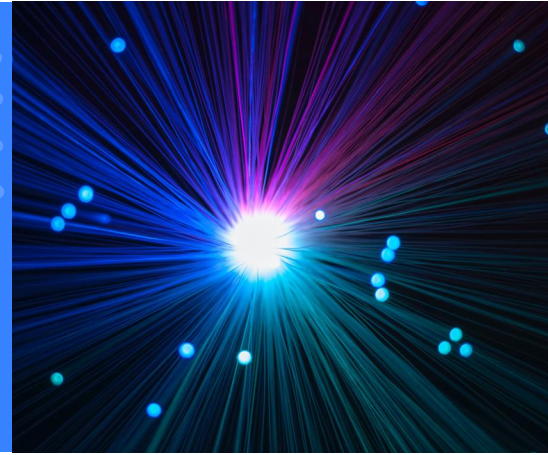
“WorkSpan's powerful ecosystem cloud platform enables our partners to collaborate across the Microsoft ecosystem more effectively to accelerate solution delivery and increase value for customers.”

Gavriella Schuster

**Corporate VP, One Commercial Partner,
Channel Chief,
Microsoft**

SECTION 3

Ecosystem Best Practice Adoption



The good news is you can implement each of the above best practices by adopting a best-of-breed ecosystem business management platform to facilitate digitization, connection, and agility.

We're excited to introduce you to WorkSpan Ecosystem Cloud. WorkSpan digitizes your business processes, connects you to your partners, and connects you to your ecosystem data to help you drive more partner-sourced revenue.

With simple integrations to your and your partners' CRM, marketing, and other business systems, WorkSpan eliminates redundant data entry and allows you to run your partner business with actionable reporting and insights.

"Our approach is to drive quantified collaboration for the Global Strategic Services Partner program where collaboration results in positive customer outcomes. WorkSpan is the first tool that helps us accomplish this."

**–Mike Bruchey, Global VP Partner Solutions,
Global Business, Development & Ecosystem, SAP**

Very different from the tools and approaches built for a bygone era of partnering, WorkSpan isn't another PRM portal. WorkSpan is your partnering business system of record and your single source of truth for all your partner programs and initiatives.

1 | Operationalize Co-Selling Across All Partner Models

WorkSpan helps you successfully sell together with your ecosystem partners, across every partner type, selling motion, and partner business model.

Whether you're working with resellers, systems integrators, software, hardware, hyperscalers, or any other partner, WorkSpan helps you and your partners engage and collaborate. It's simple to build joint plans, set shared objectives (such as pipeline and revenue by region, industry, and geography), conduct weekly pipeline reviews, and execute selling motions together as one.

With WorkSpan, it's simple to work with your partners to create joint sales plans, define mutual objectives, invite partners to collaborate, and close sales opportunities together.

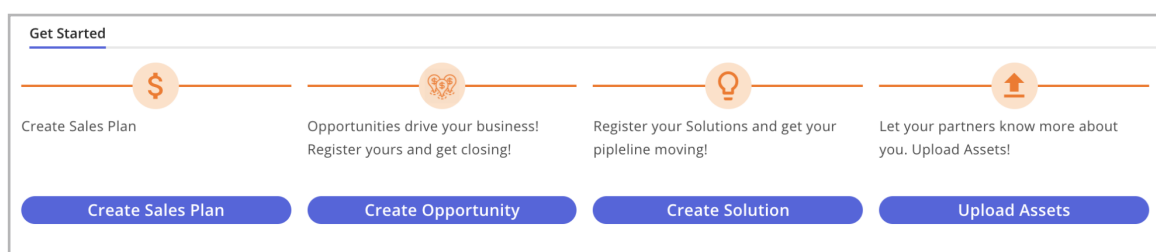
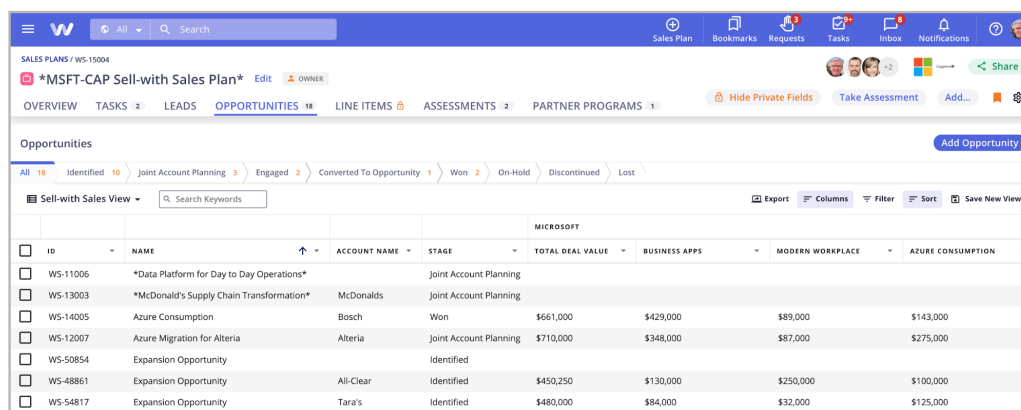


Figure 1.1: Guide your partners to start their engagement via the "Get Started" panel where they can take actions including creating a joint sales plan, share an opportunity or nominate a solution.

For example, WorkSpan customers run their co-sell, re-sell, cross-sell, renewal, and referral motions with their partners using WorkSpan as the shared system of record for joint sales plans, leads, and sales opportunities. With a single source of truth visible and trusted by all, WorkSpan becomes the hub for QBRs and weekly pipeline review calls.



The screenshot shows the 'Opportunities' section of the WorkSpan interface. It includes a navigation bar with tabs for OVERVIEW, TASKS, LEADS, OPPORTUNITIES (selected), LINE ITEMS, ASSESSMENTS, and PARTNER PROGRAMS. Below the tabs, there's a filter bar with 'All' (18), 'Identified' (10), 'Joint Account Planning' (3), 'Engaged' (2), 'Converted To Opportunity' (1), 'Won' (2), 'On-Hold', 'Discontinued', and 'Lost'. A table of opportunities is displayed with columns for ID, NAME, ACCOUNT NAME, STAGE, TOTAL DEAL VALUE, BUSINESS APPS, MODERN WORKPLACE, and AZURE CONSUMPTION. The table lists several opportunities, including 'Data Platform for Day to Day Operations' and 'McDonald's Supply Chain Transformation'.

ID	NAME	ACCOUNT NAME	STAGE	TOTAL DEAL VALUE	BUSINESS APPS	MODERN WORKPLACE	AZURE CONSUMPTION
WS-11006	*Data Platform for Day to Day Operations*		Joint Account Planning				
WS-13003	*McDonald's Supply Chain Transformation*	McDonalds	Joint Account Planning				
WS-14005	Azure Consumption	Bosch	Won	\$661,000	\$429,000	\$89,000	\$143,000
WS-12007	Azure Migration for Alteria	Alteria	Joint Account Planning	\$710,000	\$348,000	\$87,000	\$275,000
WS-50854	Expansion Opportunity		Identified				
WS-48861	Expansion Opportunity	All-Clear	Identified	\$450,250	\$130,000	\$250,000	\$100,000
WS-54817	Expansion Opportunity	Tara's	Identified	\$480,000	\$84,000	\$32,000	\$125,000

Figure 1.2: Pipeline view of the joint opportunities shared by partners Microsoft and Capgemini.

Together, you and your partners can nominate accounts and orchestrate joint account planning with a "workflow view" of opportunities across each sales stage and clear dashboards of cross-company pipeline metrics.

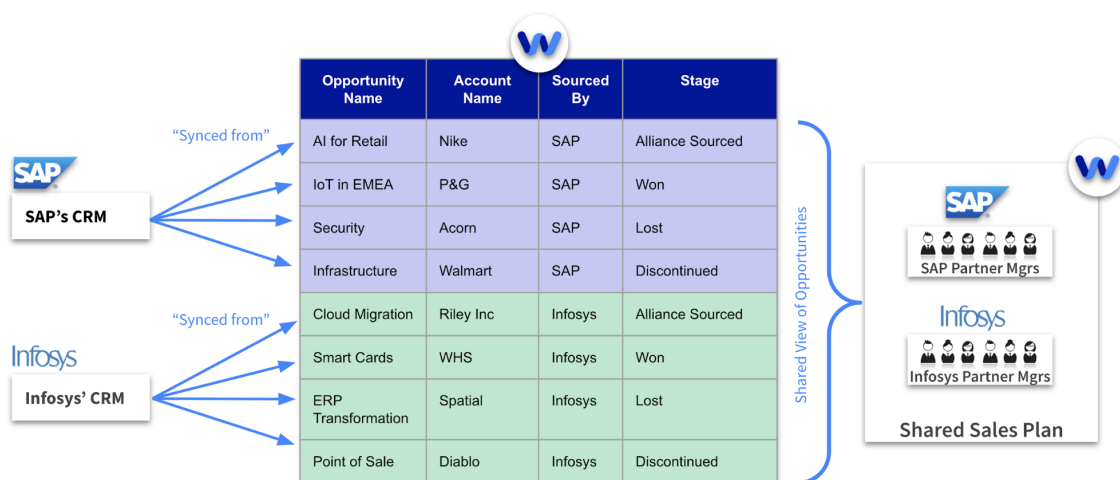


Figure 1.3: An illustration depicting multiple shared opportunities within a sales plan between partners SAP and Infosys. See where some opportunities originate from SAP's CRM system and others from Infosys' CRM, all meeting together in a single, shared sales plan of opportunities visible to both partners on WorkSpan.

When you manage a joint pipeline with your partner in WorkSpan, you can connect both your CRM and your partner's CRM to WorkSpan. With a bi-directional integration, updates can flow into WorkSpan, and from WorkSpan to everyone's CRM systems, so you're always working with fresh data, and always in-sync.

2 | Unlock Cross-Company Collaboration

WorkSpan simplifies and facilitates work across company lines. With cross-company workflows to sell-with and sell-through your partners, fund campaign proposals, and build joint solutions, your partner programs can scale simply and exponentially.

Convert your current ad hoc project management and collaboration exercises into repeatable and scalable business processes with Workflows on WorkSpan.

"Similar to the LinkedIn model but for B2B, WorkSpan connects enterprises on a network and enables a more agile way to do business and drive innovation."

–Stefan Sigg, Chief Product Officer, Software AG



Figure 2.1: This chevron bar displays above your list of joint pipeline opportunities showing how many opportunities are in each of the sales stages where your partner teams are managing pre-pipeline and pipeline opportunities to close with partners.

Workflows make it simple to work together with partners to track progress, accomplish objectives, and execute program motions. With Workflows, previously disconnected program activities across partners are in sync, orderly, and accessible, so everyone knows and agrees on where things stand, what's next, and who's accountable.

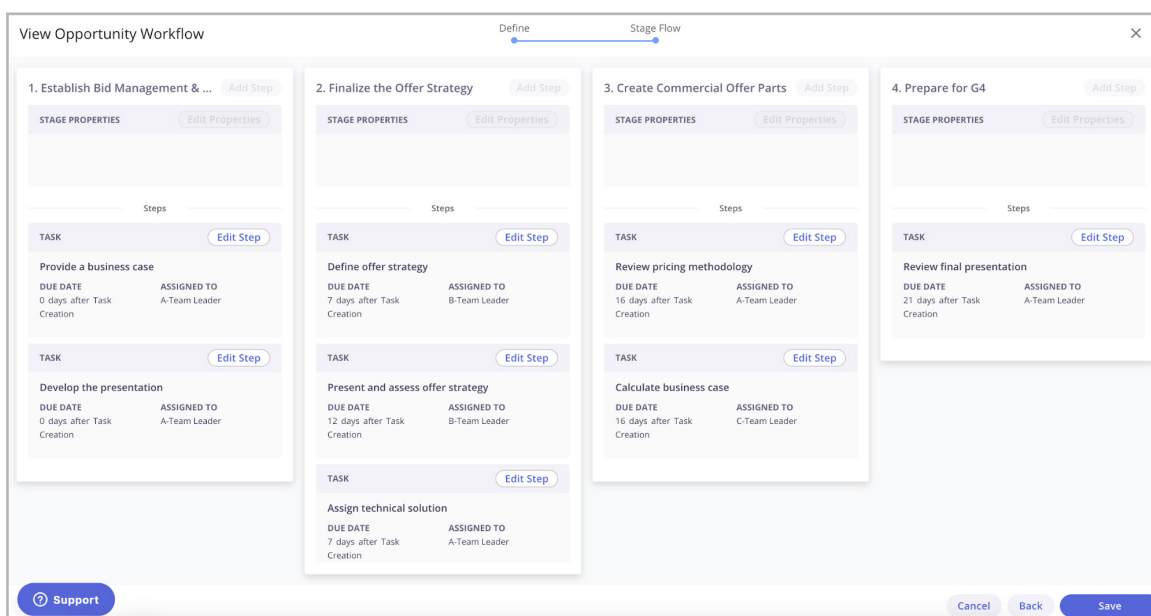


Figure 2.2: This screen shows how you can define your opportunity workflow, visualized in a kanban board layout. Note how you can define clear next steps, standardized due dates, owners, and customized workflow steps.

For example, WorkSpan customers engaging in co-selling with their partners use sales opportunity workflows to collaborate on joint opportunities and run weekly pipeline reviews. And some customers, including SAP, customize the workflows to fit their specific sales stages and processes.

3 | Measure and Report Like a Direct Sales Team

With WorkSpan, you can define reports and measure performance across sales, marketing, solutions, and incentives. You can see a snapshot of exactly what's happening across

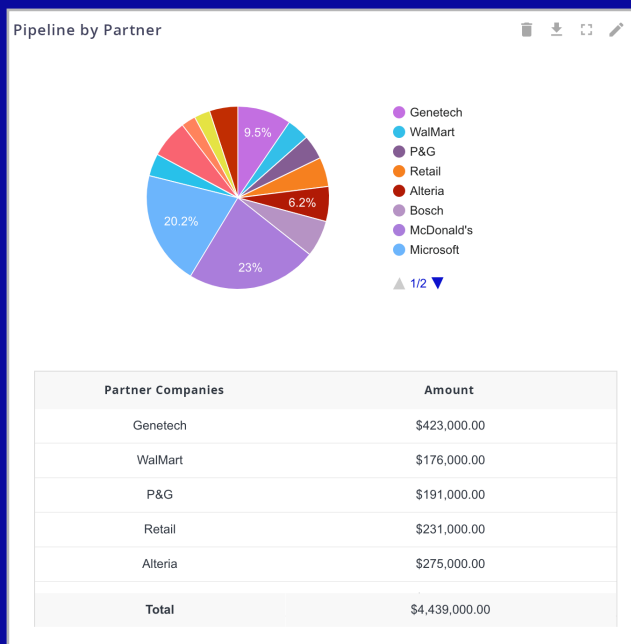


Figure 3.1: Here is a pie chart option available in WorkSpan showing partner-influenced by revenue by solution across the ecosystem. Note the ability to download the chart to easily insert into QBR slides, email, etc.

your ecosystem at a moment's notice and build reports with real-time data from your partners' CRM systems.

Many of our customers call this a "QBR in a browser." You can now shift from "I don't know" to "I'm on top of it" with these actionable insights. Rather than needing to wait until the end of a quarter or year, you can pull up a dashboard in WorkSpan and see a 360-degree view of your partnership. WorkSpan helps you articulate your ecosystem partnerships' health and determine where you are unlocking the most value.

Dashboards in WorkSpan can be made on the fly and tailored to show performance across partners, solutions, industries, regions, strategic initiatives, lines of business, and any other criteria you use to run your business. You can even save and share specific views for specific stakeholders.

"We're very excited. We've gone from managing in an ad-hoc manner on the fly to have a well-defined process and have KPIs and metrics out of that."

**-Jason Boggs, Senior Director,
Cloud Partner Ecosystem, NTT Data**

For example, suppose you are having a review meeting with your Head of EMEA. With WorkSpan, you can have a view that shows all of the joint activities with your ecosystem partners in EMEA and sort by partner, activity type, stage, solution, and revenue.

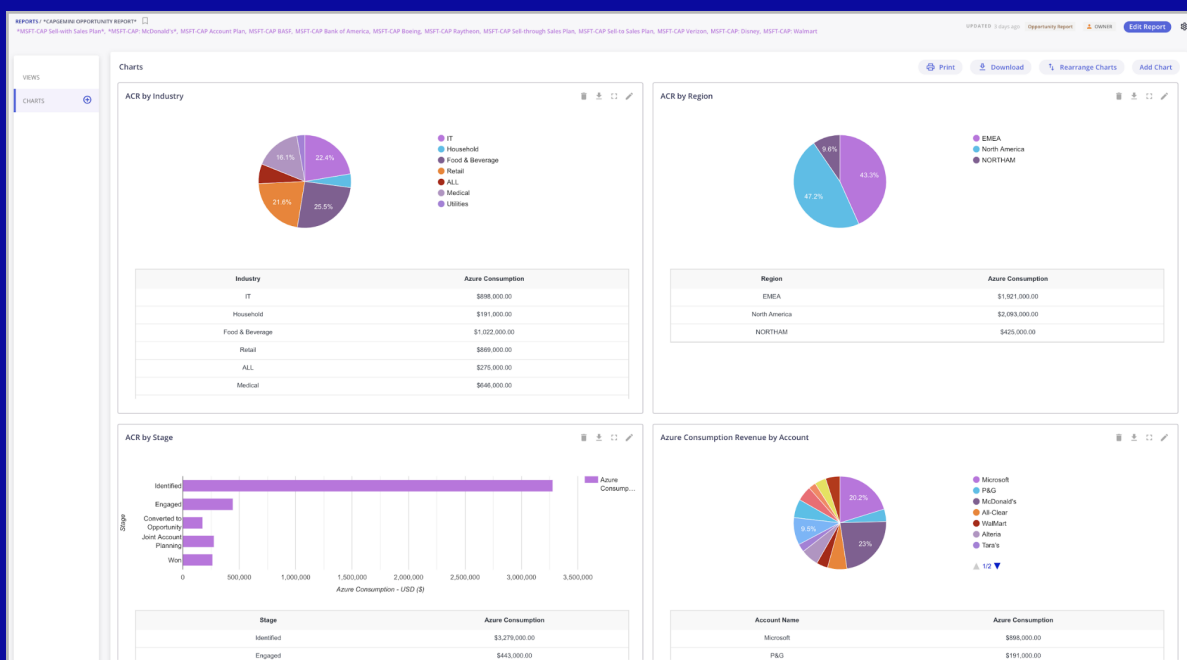


Figure 3.2: Here is a full reports view in WorkSpan showing reporting by industry, by region, by account, and by sales stage. Reporting visualizations are simple to create and configure, no spreadsheet report-building proficiency required!

WorkSpan’s powerful reporting is possible because all of your partner program data, including data from your ecosystem partners, is together in one place — a game-changing capability that simply isn’t possible with spreadsheets or PRM tools.

4 | Harness the Power of Multi-Way Partnering

WorkSpan connects ecosystem partner companies together in the same way LinkedIn connects you to other professionals — via a network.

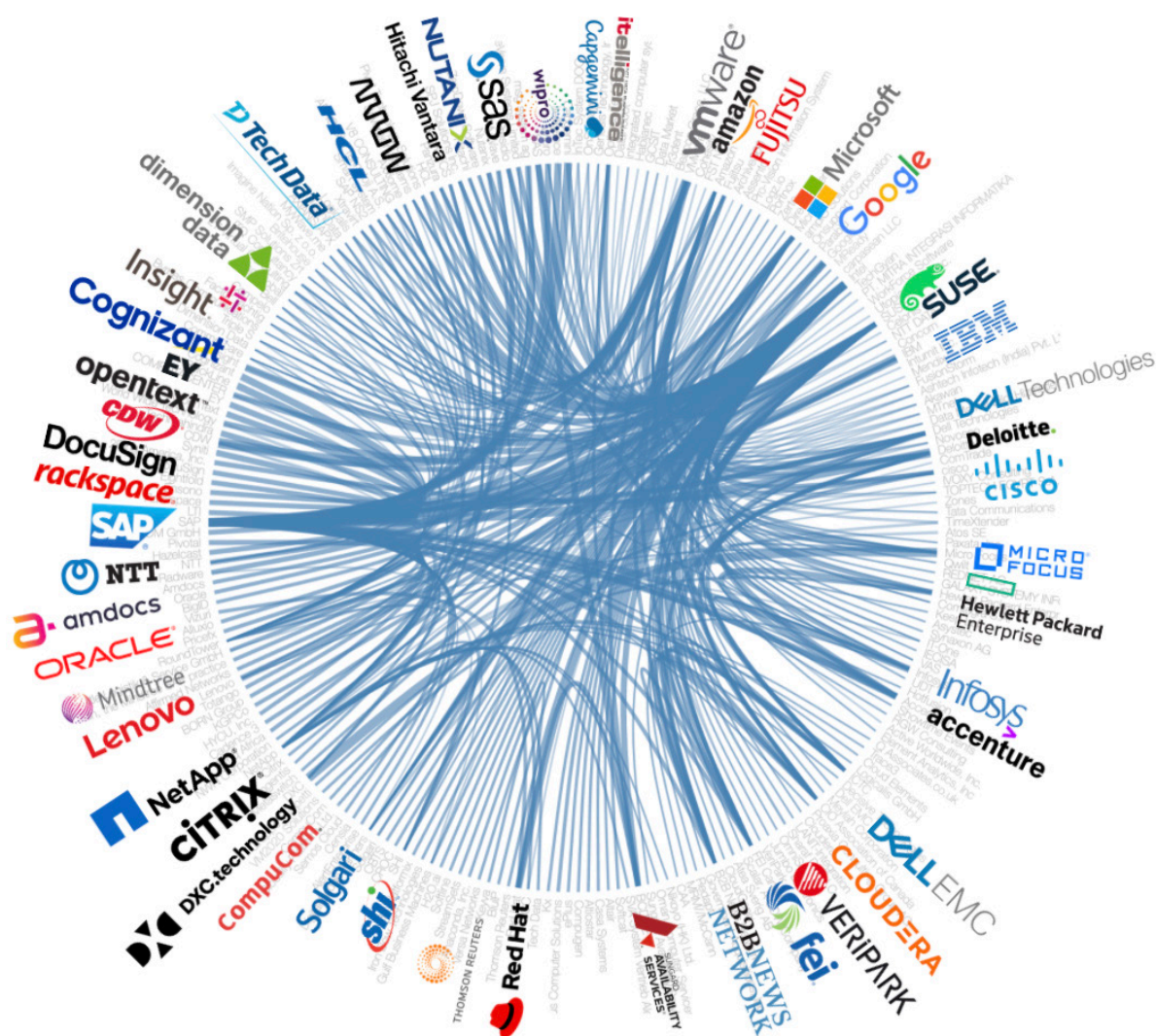


Figure 4.1: Here's a visualization showing actual collaboration connections between partner companies on WorkSpan Network. With so many active companies working together on the network, you might recognize partners you already work with every day.

Unlike PRM, CRM, and other enterprise business systems, WorkSpan is a shared cloud application where all partner companies and partner professionals come together in one place to perform partnering work. Simply invite anyone to add them to your shared activity, such as a lead, sales opportunity, or solution, to start working with them immediately.

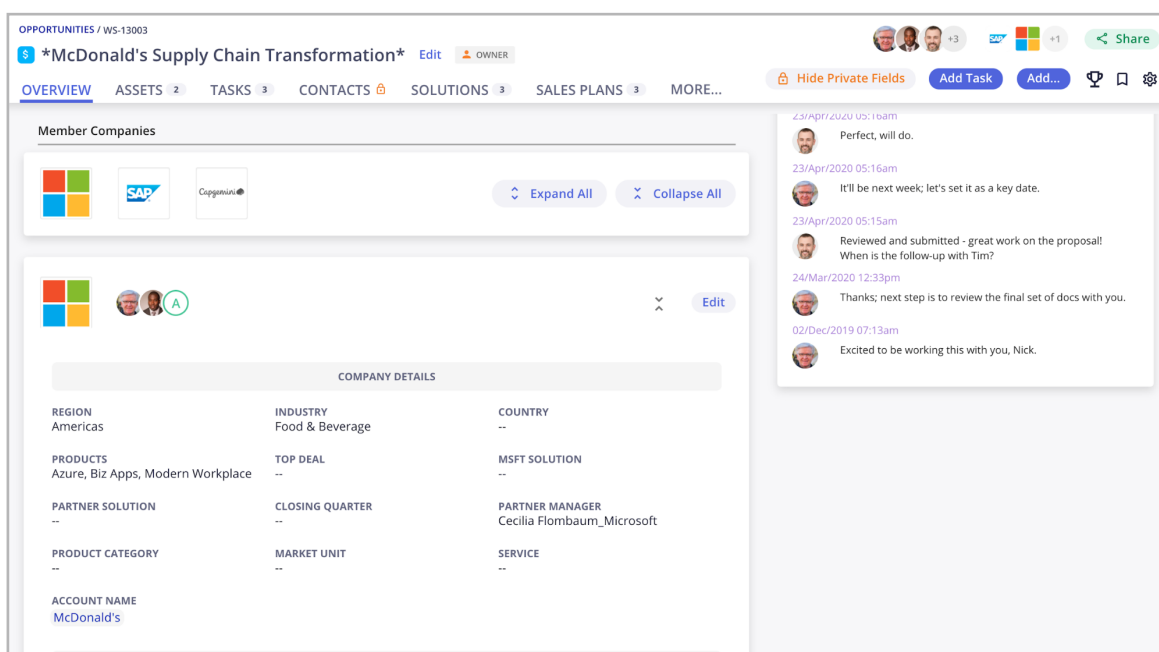


Figure 4.2: Here's an example of a shared opportunity in WorkSpan. Here, we see Microsoft, SAP, and Capgemini working together to close a large supply chain transformation deal.

When collaborating today, modern ecosystem partnering often involves working with more than one other partner company to sell together to shared customers or build joint solutions. With WorkSpan, you can invite any number of partners to work together with you on the network. On WorkSpan, we call this “multi-way partnering.”

“WorkSpan is an expert in selling through ecosystems where you have one or more ISV, services providers, and Microsoft providing solutions to customers.”

–Cecilia Flombaum, Worldwide Head of Business Applications Partners, Microsoft

WorkSpan supports multi-way partnering for shared opportunities, leads, and solutions. Above, we see three partners — Microsoft, SAP, and Capgemini — collaborating on WorkSpan to sell to their shared prospect account, McDonald's.

On WorkSpan, each company has its own space for each opportunity (or lead, or solution) and manages its own data, independent of the other participating partners. So, each company tracks its own revenue, makes its own forecasts, applies its own metrics, etc. And, each company chooses which data to share with its partners and which data to keep private.

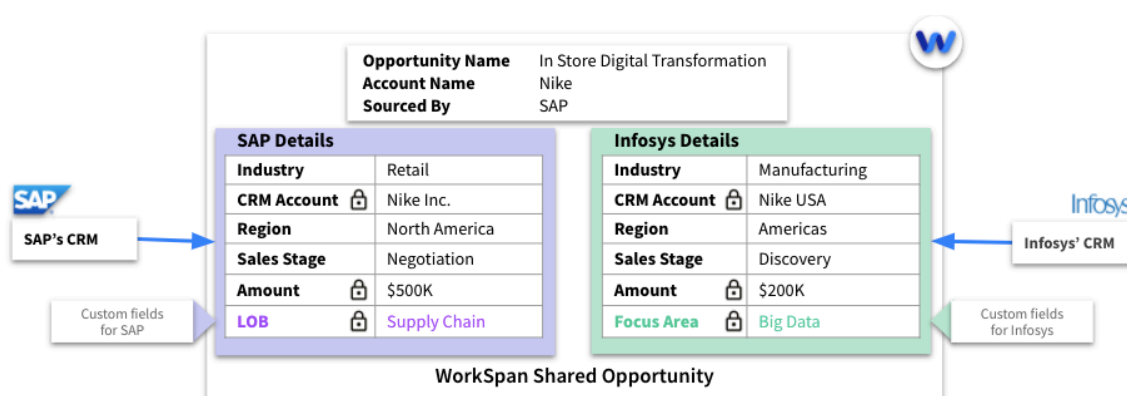


Figure 4.3: This illustrates a WorkSpan shared opportunity between partners SAP and Infosys as they collaborate to close a joint opportunity with Nike. Note each partner can define custom fields on the opportunity and see where the lock icon indicates private fields which are contained in that opportunity, but are not shared with the partner.

Multi-way partnering relationships are common in ecosystem selling and not supported by any other ecosystem business management solution. As a result, you spend more time executing and less time fitting your data into another company's forms, especially when working with multiple partners, simultaneously.

5 | Build Infrastructure for Pre-Pipeline

WorkSpan is your infrastructure for successfully building and managing pre-pipeline across your ecosystem. With WorkSpan, you and your partners can nominate leads and drive partner-sourced opportunities prior to their acceptance as a formal opportunity in CRM.

Our customers love this because, for the first time, partner managers now have a system to manage joint account plans and shared pre-pipeline together in one place.

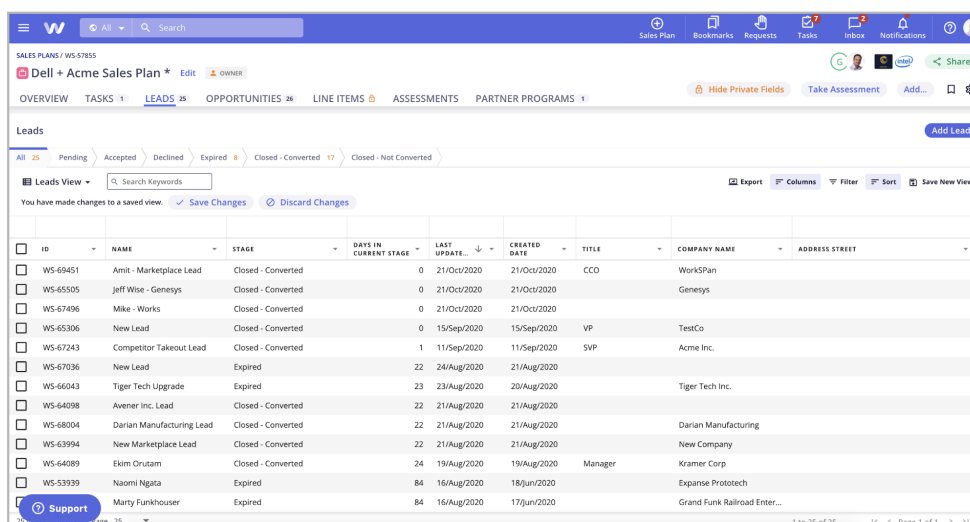
A strong pre-pipeline gives you the ability to add partner-sourced revenue to your company. You can now effectively forecast, attribute, and convert shared leads into a shared pipeline on WorkSpan.

“CRMs are a sales tool, WorkSpan is the tool that allows our partner managers to drive their joint opportunities forward.”

**–Mike Bruchey, Global VP Partner Solutions,
Global Business, Development & Ecosystem, SAP**

Creating joint sales plans and conducting weekly pipeline reviews becomes a snap. WorkSpan gives you and your partners the ability to share leads and work together from one place to advance each lead to pipeline and closed-won.

And, when a pre-pipeline opportunity is ready for your sales teams, you can either automatically create the opportunity in CRM, or match your WorkSpan opportunity to a CRM opportunity your AE has created.



ID	NAME	STAGE	DAYS IN CURRENT STAGE	LAST UPDATE	CREATED DATE	TITLE	COMPANY NAME	ADDRESS STREET
W5-69451	Amit - Marketplace Lead	Closed - Converted	0	21/Oct/2020	21/Oct/2020	CCO	WorkSpan	
W5-65505	Jeff Wise - Genesys	Closed - Converted	0	21/Oct/2020	21/Oct/2020		Genesys	
W5-67496	Mike - Works	Closed - Converted	0	21/Oct/2020	21/Oct/2020			
W5-65306	New Lead	Closed - Converted	0	15/Sep/2020	15/Sep/2020	VP	TestCo	
W5-67243	Competitor Takeout Lead	Closed - Converted	1	11/Sep/2020	11/Sep/2020	SVP	Acme Inc.	
W5-67036	New Lead	Expired	22	24/Aug/2020	21/Aug/2020			
W5-66043	Tiger Tech Upgrade	Expired	23	23/Aug/2020	20/Aug/2020		Tiger Tech Inc.	
W5-64098	Avenier Inc. Lead	Closed - Converted	22	21/Aug/2020	21/Aug/2020			
W5-68004	Darian Manufacturing Lead	Closed - Converted	22	21/Aug/2020	21/Aug/2020		Darian Manufacturing	
W5-63994	New Marketplace Lead	Closed - Converted	22	21/Aug/2020	21/Aug/2020		New Company	
W5-64089	Ekim Orutani	Closed - Converted	24	19/Aug/2020	19/Aug/2020	Manager	Kramer Corp	
W5-53939	Naomi Ngata	Expired	84	16/Aug/2020	18/Jun/2020		Expanse Protech	
	Matty Funkhouser	Expired	84	16/Aug/2020	17/Jun/2020		Grand Funk Railroad Enter...	

Figure 5.1: Here's an example of a sales plan panel in WorkSpan showcasing pre-pipeline leads for Dell and one of their partners for inclusion in their ongoing joint selling collaborative work — such as weekly pipeline reviews with each other, with their internal sales reps and teams, reporting to leadership and stakeholders, etc.

With a proper foundation for pre-pipeline, WorkSpan customers can identify and align their joint accounts and partner-qualified leads, access new deals they would never have been involved in, and influence and accelerate pipeline, sales, and, ultimately, revenue.

6 | Source Innovation from Everywhere

WorkSpan is more than where you and your partners meet to execute partnering work. WorkSpan is also where you can source innovative ideas from your partner ecosystem and your organization's field teams.

With WorkSpan, you can solicit outside-in ideas for joint solutions and marketing campaigns directly from teams in the field. This approach ensures an influx of new and innovative ideas to sustain your marketing and solution engines.

"WorkSpan brings a high degree of transparency to the journey of building a new solution offering. WorkSpan as a platform then becomes a core part of our product development engine."

**–Harmeet Chauhan, SVP Engineering Services;
Executive Committee Member, Wipro**

For example, our customers who run joint marketing campaigns or market development funding activities on WorkSpan, open up campaign ideation to their partner ecosystem, and internal field teams from different regions. Now, new ideas have a forum to be proposed, approved, and even funded.

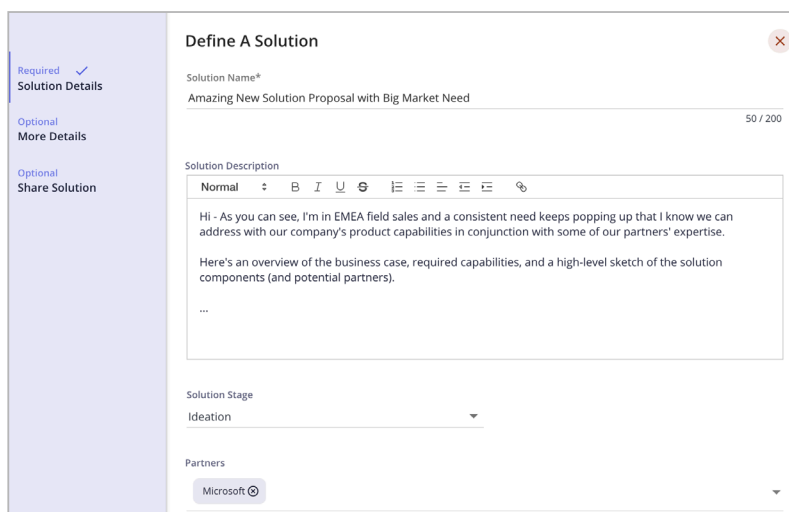


Figure 6.1: Here an EMEA field sales leader is proposing a joint solution with their company and a partner. Solution proposals can be created by any participants in a partner program, including field teams in both the program host's organization as well as participating partners, and are then routed through the defined workflow to be evaluated and moved forward.

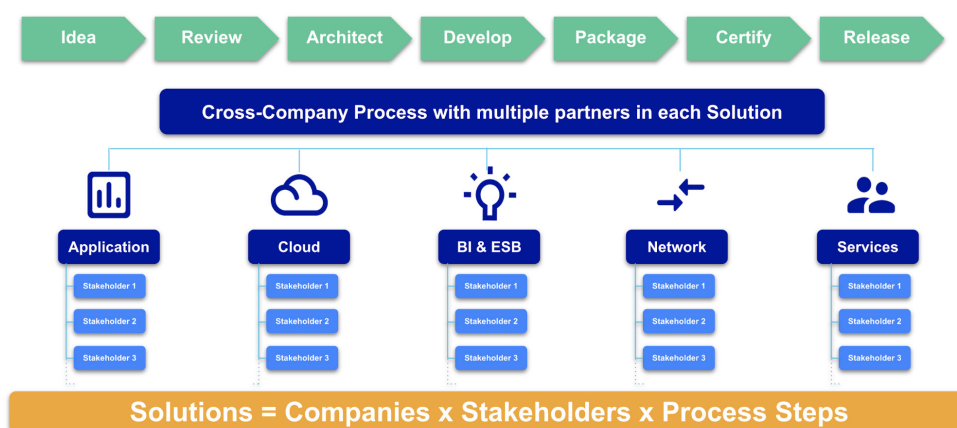


Figure 6.2: An illustration highlighting the complexity of creating and launching joint solutions while collaborating with multiple partners and stakeholders with diverse expertise all bringing unique and valuable skills to the process. WorkSpan allows you to manage your joint solutions as a portfolio working through a consistent, repeatable process.

These new ideas can go through your business process of “Business Review > Approval > Partner Approval > Execution > Completion > Canceled > Declined,” which ensures that the right ideas get picked up and resourced and stakeholders are always in the loop.

7 | Align Processes with Your Joint Solution Partners to Achieve Scale

WorkSpan helps you create and launch joint solutions with your partners. Just as WorkSpan brings simplicity and repeatability to cross-company collaboration for your selling motions, WorkSpan transforms your ad hoc solution creation and go-to-market activities into repeatable and scalable business processes.

Solution building with partners is often approached from a project management perspective. But, if you’re working with partners to build, package, and enable

joint solutions, you perform the same processes repeatedly with each solution and each partner.

“It was very effective for us to look at how we solution and built our workflows in WorkSpan. I call it “process normalization” and we’ve really enjoyed working with your team on the workflow design.”

–Keith Prince, Managing Director - Global Market Development, Dell Technologies

With WorkSpan, you now have a shared framework to collaborate with your partners on joint solutions.

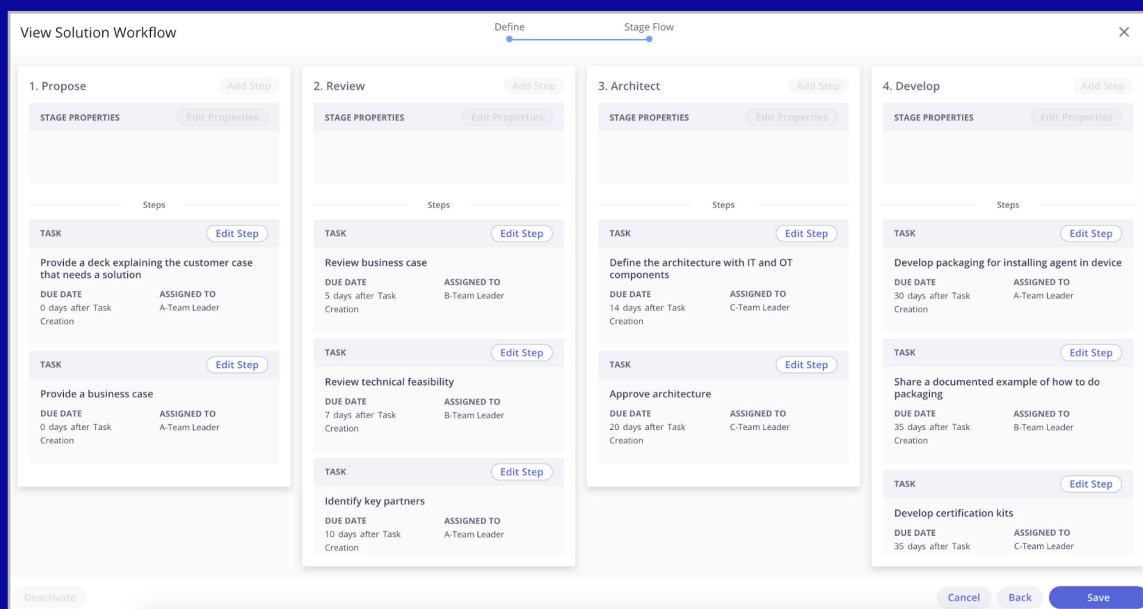


Figure 7.1: WorkSpan provides a “kanban board” view of your cross-company Joint Solution development process. Please note the clearly defined next steps, due dates, owners, and customized workflow steps.

Now, it's simple to work together with your partners to coordinate, track progress, accomplish objectives, and execute activities together. Previously complicated and disconnected processes are aligned and on-track, with clear visibility into where things stand, what's next, and who's accountable..

The real beauty of working with your partners to build and launch joint solutions on WorkSpan is your ability to apply the same successful formula to all your joint solutioning endeavors. With WorkSpan, you can transform frequently repeated individual projects into repeatable and scalable business processes.

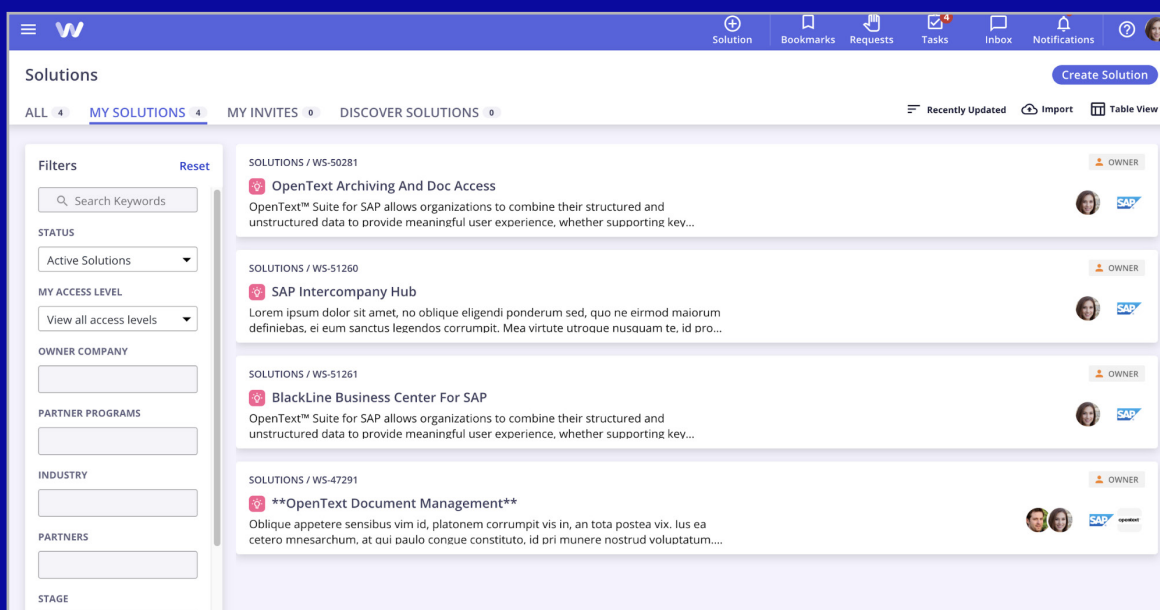


Figure 7.2: Here is a fictional list of all the joint solution workstreams in progress for a company (Microsoft) and their partners. The example shows frequent solution collaborations with SAP, but also a multi-partner collaboration with Microsoft, SAP, and OpenText.

8 | Prioritize Data Security to Reduce Risk and Build Trust

Partnering requires you to share business data with partners. WorkSpan is built from the ground up to ensure that ecosystem sharing is secure, controlled, and compliant.

WorkSpan is fully SOC2 and GDPR compliant and exceeds the rigorous security standards of the top technology companies in the world.

All data on WorkSpan encrypted, and granular attribute-based access control policies define access to data. WorkSpan's security framework addresses the unique requirements of securing data over a network and delivers granular application access control far superior to traditional role-based application security models found in most enterprise applications.

"Alliance management is very data-intensive, especially when collaborating on joint programs. WorkSpan unifies data from CRM systems, partners, marketing, and product management that allows me to do everything with partners in a secure way."

**–Roland Wartenberg, Senior Director,
Global Strategic Alliances, NetApp**

For example, WorkSpan customers typically configure policies by which opportunities are shared with only specific users and companies — a simple and powerful capability made possible by WorkSpan’s attribute-based access control framework.

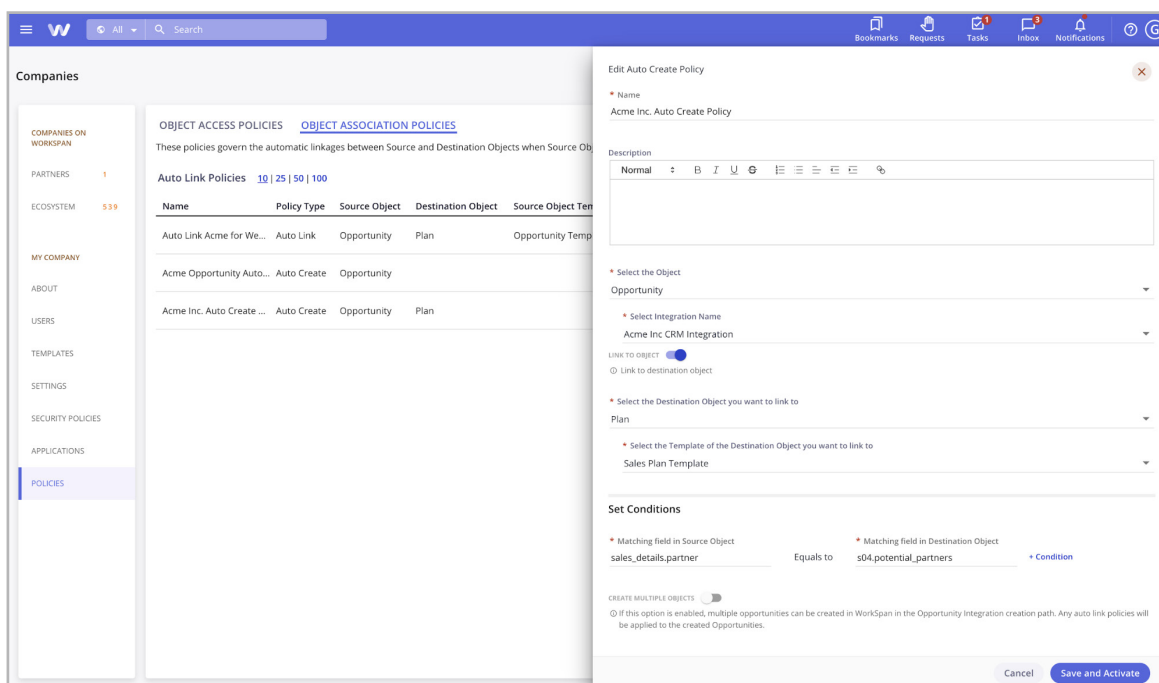


Figure 8.1: WorkSpan provides very powerful capabilities to set security access and auto-association policies for the entire company, or more granularly for one or more specific partner-company collaborations.

Each company on the WorkSpan network owns its own access rights to information on the Network and can customize its data model, access policies, and define shared fields and private fields. Shared fields allow for selective sharing of specific information with specific, trusted companies and trusted individuals. Private fields are viewable only to people within your own company.

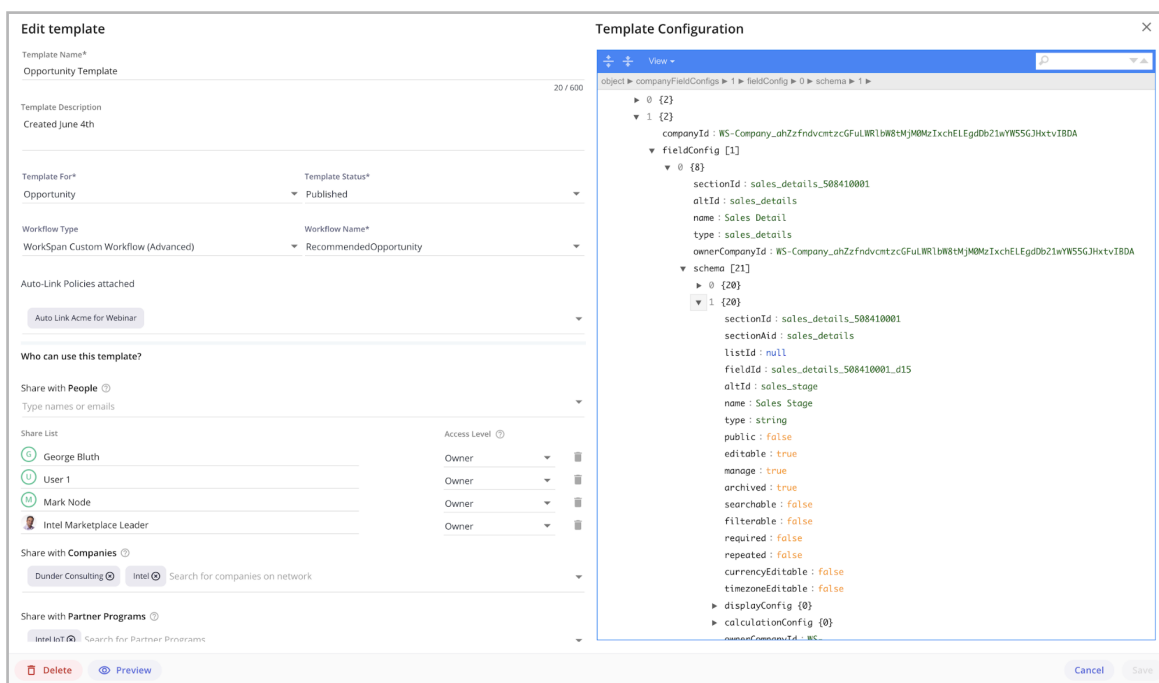


Figure 8.2: This shows the extensive capabilities available to all companies to customize “templates” for objects in WorkSpan - in this case for opportunities. While the right side of the screen could be intimidating to non-engineers, we show it to give you a sense of the depth and flexibility available to model your specific data elements and processes.

Many of our customers, for example, configure their data model to keep all deal size information private, and therefore visible in WorkSpan only to colleagues from within their own company.

WorkSpan’s fine-grained data access control capabilities protect your and your partners’ data and control access. You’ll never again have to worry about one of your partner managers accidentally sending a spreadsheet loaded with sales opportunities to the wrong partner or an accidental leak of sensitive data jeopardizing partner trust.

With WorkSpan, you can be confident your and your partners’ critical business data is protected.

9 | Adopt a Shared System of Record for Partnering

WorkSpan is the cloud application at the foundation of modern ecosystem partnering success. WorkSpan digitizes your ecosystem and connects your partners, processes, and data so you and your partners have a shared system of record at the core of your partnerships.

WorkSpan is a shared system — it serves as your system of record for your partnering activities with your partners, and it serves as your partner’s system of record for their partnering activities with you and their other partners.

Both you and your partners can integrate your CRMs and other internal business systems with WorkSpan. With integrated data, each company can report on its performance, within its own context, and easily share with stakeholders to conduct weekly pipeline reviews and QBRs.

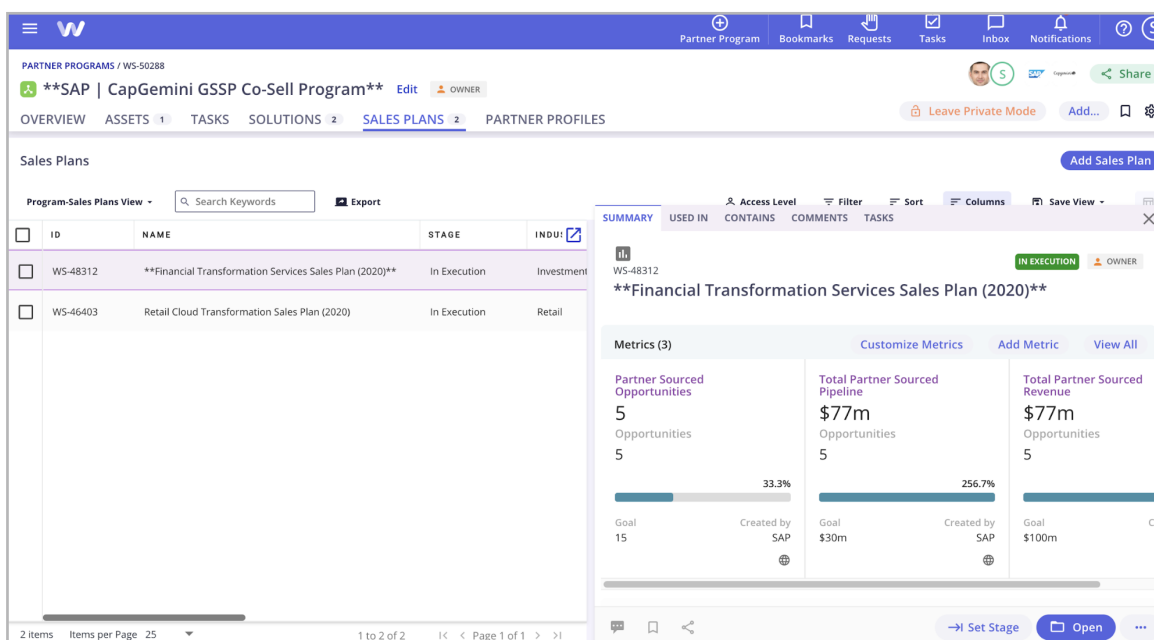


Figure 9.1: Partner Programs are central to organizing partnering activities in WorkSpan, representing a partner initiative, region, driving sales around a key solution, etc. This example shows a partner program with two associated Sales Plans, each with goals and current status front and center.

Similar to LinkedIn, WorkSpan is a connected network of people and companies working together on the same cloud application. Simply invite your partners and stakeholders to sales plans, leads, sales opportunities, and more, to digitally collaborate with them on WorkSpan.

To protect your and your partners' privacy, WorkSpan has airtight, customizable access policies and privacy controls to ensure you and your partners only share the data you intend and specifically designate.

"WorkSpan is reshaping the importance of the partner manager profession. As a result SAP's team is on the cutting edge of this transformation. It requires a great deal of work on our part to successfully activate new partners, but our partners will recognize SAP's team uniquely operating at a higher level of professionalism."

**–Tom Roberts, Senior Vice President,
Global Partner Organization, SAP**

WorkSpan also equips you with the ability to control the visibility of private data shown on your screen. For example, when sharing your screen during joint pipeline reviews, simply set the on-screen toggle to "hide private fields," to hide your private data in fields and metrics on every page and table throughout WorkSpan from view.

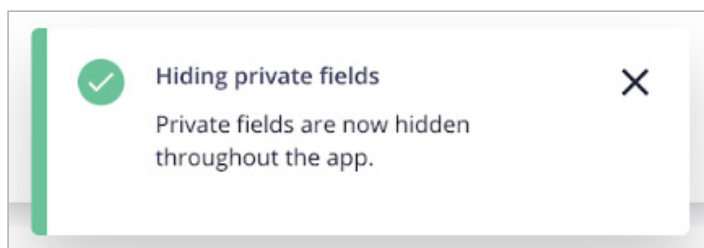


Figure 9.2: This pop-up is confirming that the partner manager has chosen the "Hide Private Fields" option and all private information anywhere in WorkSpan will not be shown on the screen. This is super helpful when a partner manager is sharing their screen on a joint planning call -- to avoid inadvertently showing private information to their partner.

Sharing will always be the cornerstone of successful partnering. With WorkSpan as your shared system of record, you can be confident you'll always have the most accurate data and most complete ecosystem collaboration capabilities to partner successfully and securely.

SECTION 4

Closing Thoughts



Today, partner program leaders are depended upon to drive partner-sourced revenue, reduce costs, improve operational efficiency, and quantify business impact.

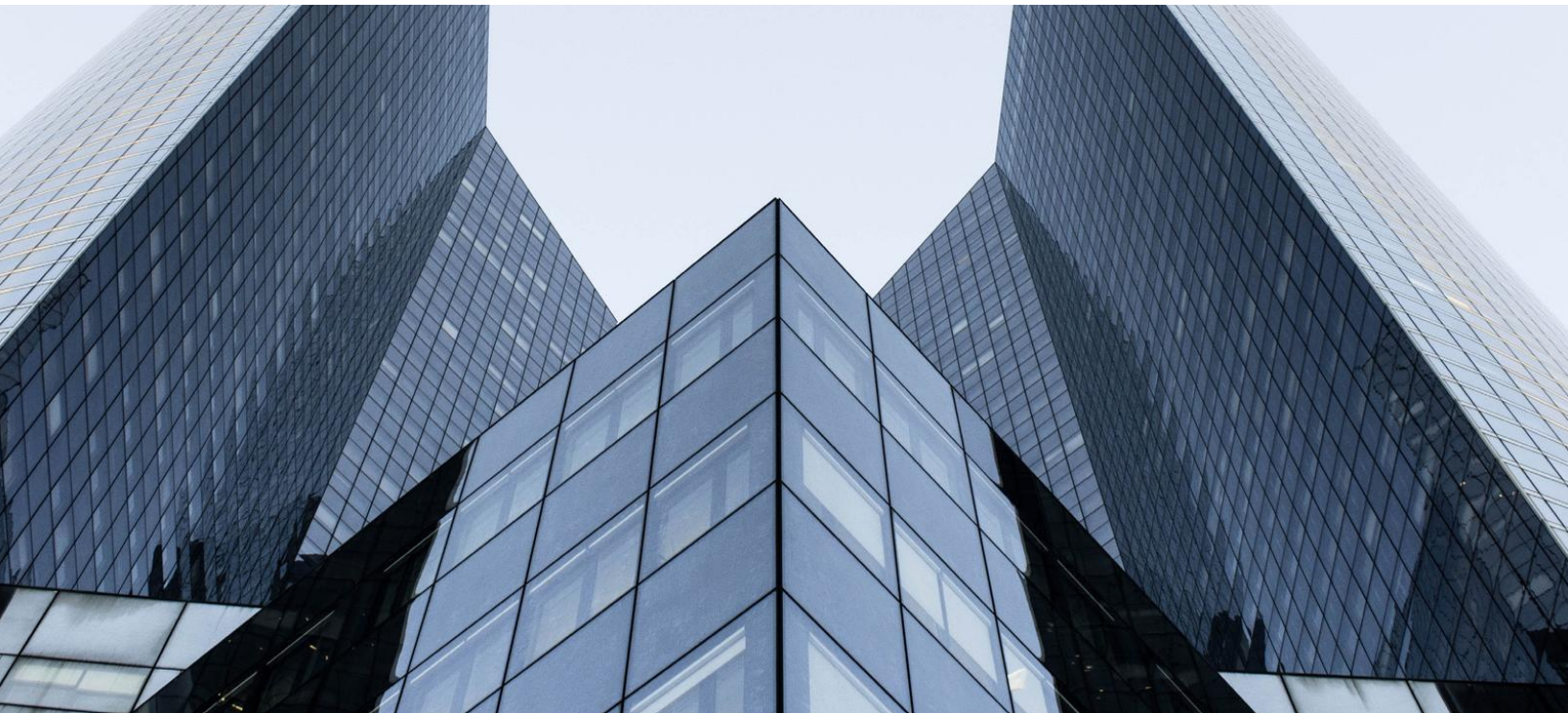
Fortunately, as businesses of all sizes, industries, and locations rapidly evolve from the rigid partnering structures of the past into today's agile and dynamic partner ecosystems, digital transformation for partnering has finally arrived.

WorkSpan digitizes your partnering processes, collaborations, and reporting by connecting ecosystem professionals, workflows, and data to a shared network, which is why WorkSpan leads the transformation in ecosystem business management.

Confidently navigate even the toughest market conditions, grow revenue, and lead your partner business into the future with WorkSpan Ecosystem Cloud.

The WorkSpan team is happy to answer your questions about how this could apply in your organization or give you a live tour of WorkSpan Ecosystem Cloud platform.

Reach us at contact@workspan.com



Trusted By

WorkSpan Digitizes Partner Programs for the World's Leading Technology Companies:



About WorkSpan

WorkSpan is the #1 ecosystem business management platform. We give CROs a digital platform to turbocharge indirect revenue with their partner teams at higher win rates and lower costs. We connect your partners on a live network with cross-company business applications to build, market, and sell together. You can securely exchange data with trusted partners and have real-time visibility and insights.

We power the top 10 business ecosystems in the technology and communications industry today, managing over \$50 billion in joint pipeline, 6x faster speed to market for joint solutions, and 2x partner manager productivity. Customers include Microsoft, Verizon, SAP, Accenture, Dell, NetApp, VMware, and SoftwareAG. WorkSpan was named Cool Vendor in Channel and Sales Enablement by Gartner in 2019. Headquartered in Foster City, California, WorkSpan has a presence in Bangalore and over 20 other locations worldwide.