

OFFERING OVERVIEW

WorkSpan's Ecosystem Cloud Elevates Business Networks

**Networks—Not One-to-One Partnerships—Change the
Game for Partnerships and Alliances**



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EXECUTIVE SUMMARY

Approaches to partnerships and alliances have changed as significantly as the IT industry itself has over the past decade. Traditional channel sales have given way to ecosystems and networks. The nature of open integration and flexible cloud services has changed the way enterprise customers buy technology. Today, they invest in ecosystems of interrelated technologies rather than single offerings. As a result, technology companies are defining new models for how they work with partners.

With Ecosystem Cloud, WorkSpan provides a distinctive and, so far, unique approach to managing the joint activities that technology partners undertake to develop, market and sell their offerings. Unlike traditional partner relationship management systems, ecosystem management platforms like WorkSpan’s are designed to support multiple partner teams working together. This report identifies key differentiators, examines functional capabilities, considers the offering’s strengths and weaknesses, and outlines key use cases.

Business Themes

Future of Work

Digital Marketing & Sales Effectiveness

Next-Generation Customer Experience

Technology Optimization

Data to Decisions

ABOUT WORKSPAN'S ECOSYSTEM CLOUD

Overview

WorkSpan's Ecosystem Cloud is the result of its founders' firsthand experience with the challenges of managing partner relationships effectively. For Amit Sinha, that was taking SAP's HANA platform and apps to market. For Mayank Bawa and Milind Joshi, it was building Aster Data Systems and eventually selling it to Teradata. All three noticed that traditional models of managing tiered channel partners didn't reflect reality. Instead, networks—ecosystems—of complementary providers were increasingly becoming the norm. Yet there were no good tools available to support that kind of joint marketing and selling.

With WorkSpan, their vision is to build a network of partners that is greater than the sum of its parts, not simply a software-as-a-service (SaaS) offering. The goal is to change what's possible in partnerships and alliances. Although the vision is ambitious, the company's starting point was practical. Its first step was to tackle the key challenges that hamper most joint go-to-market initiatives. The company followed the most important factor: the money.

For WorkSpan's customers, that means qualifying, coordinating and closing revenue-generating joint sales opportunities between partners. It includes improving the management process for allocating, tracking and evaluating joint marketing activities and market development funds (MDF). And, increasingly, the real wins come from developing joint solutions among multiple partners.

Market Segment

Ecosystem management platforms provide a means to coordinate and facilitate activities among multiple partners in an ecosystem. These activities include joint solution development, joint marketing and joint sales. In addition to providing native functions such as workflows, calendars, progress tracking and information sharing, platforms also integrate with marketing automation and customer relationship management (CRM) tools that contain pertinent customer, activity and performance data. This avoids the need to replicate critical information within the platform.

Although partner relationship management (PRM) systems and partner portals have existed for many years, ecosystem management platforms fundamentally differ in three key objectives:

- 1. Facilitate and support the network effect within an ecosystem.** Ecosystems operate on more than one-to-one, hub-and-spoke relationships. Often, multiple partners work together to present a joint offering that draws on their complementary strengths and capabilities. Consider the cyber risk management offering provided jointly by Apple, Cisco, Aon and Allianz,¹ for example. As the number of partners within an ecosystem grows, so does the potential for offerings (and campaigns and opportunities) that span multiple organizations. The challenge becomes providing a means for partners to identify and collaborate with each other as they create new opportunities.
- 2. Support inclusive, not exclusive, licensing and pricing models.** Ecosystem management platforms are designed to encourage and promote large numbers of users across partner organizations, geographies and departments. For this reason, licensing models are typically based on the number of partner organizations managed by the ecosystem “lead.” By contrast, traditional PRM systems typically license based on the number of users. This can be a significant hurdle for getting the critical mass required across different teams to drive effective collaboration and better results.
- 3. Incorporate a wide range of shared communications, activities and tracking between multiple partners.** The scope of ecosystem management platforms covers a wide range of communications, activities and information sharing. This includes managing proposals for joint campaigns, funding allocation, funding usage, progress and results, coordinating joint events, managing contact lists, opportunity tracking, splitting responsibilities on and ownership of opportunities, attribution and so on. All can be done across multiple partners in a given program. Relationships within the system aren’t limited to one-to-one engagement between an individual partner and the ecosystem lead. Partners can see and communicate directly with each other within the platform.

Market Trends

Partnerships and alliances have always been crucial elements of any successful technology company's strategy. The role they play today, however, goes far beyond that of sales channel or implementation partner. Constellation Research sees five core trends:

- 1. Technology brings partners closer together.** Cloud services and open APIs, among other trends, have resulted in much closer relationships between complementary technology providers that each have a vested interest in their partners' success.
- 2. Disruption of reseller channels requires more value-added services.** The move to cloud, virtualization and SaaS models has disrupted traditional reseller channels. Distributors that don't add significant value of their own find themselves struggling to remain relevant to customers. Easier-to-implement technologies have changed needs for services partners, increasing demand for greater knowledge of business processes and reducing demand for some technical skills.
- 3. Marketing and sales technologies have continued to develop.** These advancements generate more data and improved performance metrics. Most aspects of marketing and sales within a given enterprise are far more transparent than they were before the advent of CRM and marketing automation systems.
- 4. Tracking of alliance marketing and sales increases.** Alliance marketing and sales require a degree of integration that has typically been either too difficult or too expensive to undertake. As a result, this kind of joint marketing and selling has not been consistently tracked or regularly validated. Spreadsheets still prevail as the default management tool. This is the last dark corner of marketing and sales in the technology industry.
- 5. Partnerships and alliances have led to greater embedding of offerings.** IT capabilities are ever more deeply embedded in other offerings—think of Rolls-Royce aircraft engine performance tracking or Bosch tools' predictive maintenance, for example. As this trend continues and value-chain partners become more interdependent, requirements for easy collaboration and transparent joint management will only increase.

Ecosystem Players

Powerful technology ecosystems today contain players of all sizes and descriptions. Even so, large companies that lead market categories tend to be the centers of gravity within a given ecosystem. These are the initial customers of WorkSpan's Ecosystem Cloud. Since these companies provide large portions of MDF and need to track the results of such investments in terms of sales and revenue, they are the players bringing their key partners into the network.

Often, their partners also see the benefit of operating within a system that replicates their real-world ecosystems, so they bring on additional partners of their own. As shown later, pricing is determined based on what role a company plays within the network.

FUNCTIONAL CAPABILITIES

WorkSpan's Ecosystem Cloud offering provides a range of native capabilities but is designed to complement rather than overlap with existing marketing and CRM systems. Ecosystem Cloud includes a core interface (which provides an overview of all activities and progress tracked within the system) and four primary components.

The key functional areas are:

- Partner Programs
- Joint Sales
- Joint Marketing
- Joint Solutions
- Joint Funds

The company also offers WorkSpan for Mobile, an additional interface to the system and all of its functional capabilities.

Partner Programs is the foundation of Ecosystem Cloud. It provides an overview of all the organizations in the network, programs that are publicly visible, and details of programs that a given organization either participates in or manages. This is the high-level view across offerings, marketing and sales.

WorkSpan's initial offering focused on the unique challenges of joint marketing. Chief among these is planning and executing joint marketing activities, tracking key performance indicator results, and managing MDF exchanged between partners. Unlike other items in a marketing budget, MDF typically has few guidelines for how funds are allocated among partners and limited follow-up on results. With Joint Marketing and Joint Funds, WorkSpan created a tool for developing proposals for new marketing programs, requesting MDF funds, approving proposals, coordinating joint marketing activities and shared data within campaigns, and reporting on outcomes and results.

It quickly became clear to the WorkSpan team members that as useful as these capabilities were, the bigger prize for their customers was tracking opportunities and deals generated through joint marketing programs. Joint Sales allows multiple partners to work together to identify, qualify and close deals together, tracking attribution along the way. The ability to more accurately track joint sales has been a major selling point for most of WorkSpan's customers.

The company extended Ecosystem Cloud further to include Joint Solutions. Also in response to customer demand, WorkSpan designed this functional area to address a growing priority within ecosystems: developing joint solutions, launching them within the network, and tracking interest and use. As with Joint Marketing and Joint Sales, this capability allows multiple partners to work together throughout the process.

USE CASES

As the role and nature of ecosystems within IT continue to evolve, so do the needs of technology companies operating within them. The result is a range of use cases for ecosystem management that span everything from tackling age-old problems to creating new models for working together.

Empowering Teams within Large Organizations

For large technology companies with multiple divisions and local teams around the world, communication and coordination remain major obstacles to getting the full value from partnerships. Global partnerships are often announced between senior executives at headquarters, but regional teams lack the information or resources to execute on the ground. Even identifying local counterparts in partner organizations can be difficult.

With an ecosystem management platform like WorkSpan's, alliance managers can more easily share and disseminate information across divisions and geographies. Because there are no license fees that prevent adding users to the system, anyone who requires or would benefit from being included can join. At the same time, regional teams can search out programs and information that support their own local priorities. Tools aren't limited to either marketing or sales teams—everyone has access and visibility.

Several of WorkSpan's customers have already seen marked improvements in the number of regions that have participated in partner go-to-market programs. This has resulted in bigger impacts, better coordination and significant reductions in the time invested in communication and tracking.

As use of the system expands across partner organizations, local offices and various teams, it gets easier and faster to roll out new programs. There is one place where everyone can go to find out what programs are active. More importantly, anyone in the network can make a request to fund a new program. Once approved by a lead partner, programs get funded and put in motion.

Demonstrating the True Impact of Partnerships

Several of WorkSpan's largest customers are making significant investments in revamping and redefining their partnership programs. This comes as part of the shift from traditional channel models to new ecosystem selling.

In these cases, the value of Ecosystem Cloud is twofold. First, having better, easier-to-use tools dramatically improves the ability to monitor and track the business that directly results from working with partners. The change here isn't so much in how partners work together but in their ability to easily

demonstrate the impact. Tools that serve the vested interests of individual users—whether marketers, salespeople or alliance managers—make this a self-reinforcing system.

Second, ecosystem selling requires a different approach to developing offerings and taking them to market. To do so, partners must rapidly develop joint offerings and test them in the market. They must be able to coordinate and work across multiple partners, not just two. They need to test marketing and sales approaches as well as offerings. And they need to track the return on investment and revenue impact of joint offerings.

These are still the early days for WorkSpan's customers who are working with these new models. This is where the company's forward-thinking customers believe the most significant value will come. Early results suggest this is true. That said, simply improving the ability to measure and track existing models for partner selling makes it even more difficult to quantify the true impact of ecosystems. How much is the result of better measurement and how much the result of new approaches?

Industry Vertical Solutions

For the moment, WorkSpan remains squarely focused on the technology sector as it builds its customer base. The requirements and priorities of this industry have shaped the Ecosystem Cloud capabilities developed so far.

The company does have plans to extend into additional sectors, particularly those that already have network relationships with its current customer base and/or similar requirements for ecosystem selling. These areas include pharmaceuticals, consumer packaged goods, financial services, communications and the industrial Internet of Things.

Customer References

WorkSpan's customer base includes a long list of well-known names in IT products and services, such as Accenture, Google, Hewlett Packard Enterprise, Infosys, Lenovo, Nutanix, Red Hat, SUSE, Trifacta and VMware.

Companies such as SAP and Microsoft, both of which are in the process of reinventing their approach to partnerships and alliances, have also come on board. Microsoft has even invested in WorkSpan's Series B funding round through its M12 venture capital arm.

PRICING

One of the most revolutionary aspects of WorkSpan's Ecosystem Cloud offering is its pricing model. Networks function best once they achieve critical mass. Getting to that point presents the major challenge for partner ecosystems. That's true of both the number of companies involved as well as the number and types of employees within them. Typical SaaS pricing models that are based on users per month inherently limit—or, at best, slow—voluntary adoption of the system.

Instead, WorkSpan's pricing is based on the number of partner organizations managed within Ecosystem Cloud by an ecosystem lead. This results in two types of partner within the platform: Premier Partners, the ecosystem leads that pay to include their partners in the network, and Participating Partners, those organizations invited to join the network by a Premier Partner.

Anyone within any of those companies can be admitted to the system and use it. Everyone on the system has visibility of the other companies on the platform. Individual users get access to specific programs and information based on roles and permissions granted by program owners. Most programs are visible across the network (though some may be restricted to certain organizations by program owners), so individuals and teams can request to be included.

Such openness has several key advantages for companies within the Ecosystem Cloud network. This model avoids the need for partners in any category to negotiate additional budget to include regional teams or expand users on the system. For companies trying to manage global partnerships and activate them on a local level, this is crucial—a sadly commonplace, too-often insurmountable hurdle.

In addition, having an open system capitalizes on grassroots interest in leveraging corporate initiatives. Field marketing and sales teams can proactively seek out or suggest programs that suit their priorities rather than waiting for top-down communications. For any alliance manager, getting that pull from field teams is a major indicator of success.

Premier Partners have more extensive capabilities within Ecosystem Cloud than do Participating Partners, particularly when it comes to tracking and controls. As a result, there's a built-in incentive for some Participating Partners to become Premier Partners and extend the network further.

ANALYSIS AND OBSERVATIONS

WorkSpan's founders established the company in 2015 because they had identified both a major shift in partnership models and an unmet need. The company has worked quickly to build a set of capabilities that support new ways of working and that solve long-standing practical challenges. As the concept and practice of ecosystem selling continue to evolve, so do WorkSpan's offerings. See the analysis of strengths, weaknesses, opportunities and threats in Figure 1.

Strengths

- **Ecosystem mindset.** WorkSpan is the first and as yet only company that has specifically designed a system around multiple partners working together as part of an ecosystem. The company's founders are strong advocates for the idea that connections between partner companies are increasing in both number and value over time, and that they persist.
- **Pricing model.** As described in detail in the Pricing section, WorkSpan's licensing model for Ecosystem Cloud overcomes one of the most significant practical hurdles for making partnerships work. Without the need to justify and obtain budget to use the system, all relevant teams within partner organizations can work together easily and effectively.
- **Scope of capabilities.** Ecosystem Cloud covers the range of core activities required to go to market within an ecosystem: developing joint solutions, marketing them and selling them together. The balance between native functionality and integration with existing marketing and CRM systems avoids major overlaps. Few PRM systems offer a similar scope of capabilities. None are designed to allow multiple partners to work together on the same initiatives.

- **Adaptability and responsiveness.** WorkSpan's core customer base comprises several very large customers that describe themselves as demanding. They consistently characterize the WorkSpan team as adaptable and responsive. Ecosystem Cloud is still a relatively young offering that, like ecosystem selling itself, is evolving rapidly. Customers see and appreciate that.
- **Varying degrees of integration.** To facilitate rapid adoption of Ecosystem Cloud, WorkSpan supports various degrees of integration. This ranges from importing spreadsheets to batch information transfers to real-time integration. Each of these options has trade-offs. WorkSpan wants to ensure customers have the options to decide for themselves. The company currently integrates with Salesforce, SAP CRM, Microsoft Dynamics CRM, and Sugar CRM, with other integrations upon request.
- **Financial stability and customer base.** WorkSpan announced \$27 million in Series B funding (Redline Capital, Mayfield, and M12, formerly known as Microsoft Ventures) in June 2019, in addition to \$9 million in Series A funding led by Mayfield in 2016. This, combined with a blue-chip customer base that continues to grow, gives us confidence in WorkSpan's long-term future.

Weaknesses

- **Onboarding and adoption.** Getting users within key teams onto the system still poses significant challenges for customers. As with any significant change to the way people work and the tools they use, it's not as simple as telling them it's there. Although many individual users may be active proponents, consistent, widespread use takes time and effort, often more than anticipated.
- **Ease of use.** The user interface looks good but isn't easy for everyone to use. As one customer described, for skeptical alliance managers, it needs to be as easy and intuitive to use as LinkedIn or Facebook. It's not quite there yet, partly because of the inherent difficulties of balancing demand for lots of functionality with creating a straightforward user experience for different kinds of users.

- **Integrations.** WorkSpan offers a range of options for integrating marketing and CRM systems, but these are still a work in progress. One of the adoption challenges customers face is getting the integrations with existing systems to work smoothly. Public APIs and a software development kit are on the road map but not yet available.

Opportunities

- **Onboarding jump-start programs.** Given how common the obstacles are to user adoption among its customers and their partners, WorkSpan would do well to invest in some resources and jump-start programs to help support new users and get the word out. Some of this is already part of the company's customer success program, but there's more to be done.
- **Additional analytics and automations.** Metrics and tracking are already a central feature of Ecosystem Cloud. The next step is introducing analytics and automation to support more effective ways of working—for example, automating account qualification based on parameters agreed upon among partners. There's a huge opportunity to identify the most effective offerings and marketing programs based on sales performance as well.
- **Identifying new ecosystem best practices.** This is a continuously evolving area for everyone involved. As the network facilitators, WorkSpan is in a unique position to help customers identify emerging best practices in working with ecosystem partners.
- **Expanding beyond the IT sector.** There is plenty of room for growth—and additional value to customers—within the IT industry. Even so, WorkSpan should carefully prioritize expansion into other industries and cross-sector ecosystems.

Threats

- **Building critical mass.** WorkSpan already has an impressive and growing list of customers. Nevertheless, the ongoing health and success of Ecosystem Cloud depends

on further expansion of the network, with both companies and users. Customers will see the biggest value if the tool becomes an indispensable part of how their ecosystems work. WorkSpan is making steady progress but must keep working toward this objective.

- **“Yet another tool” syndrome.** Workflow, project management and productivity tools proliferate in most organizations. For Ecosystem Cloud to reach its potential, it must become a go-to resource for marketers, salespeople and alliance managers to get their jobs done. If it doesn’t prove itself more useful, integrate other productivity applications that facilitate joint working or both, it risks becoming more workspace clutter.
- **Competition from PRM players.** PRM is an established market with vendors and capabilities that come closest to what WorkSpan’s Ecosystem Cloud currently offers. While PRM tools were designed to support hub-and-spoke reseller channel partner models, it’s reasonable to assume that at least some will adapt their offerings to support activities across multiple partners.
- **Managing growth.** To achieve its potential, WorkSpan must continue to build its customer base and extend the network of companies on Ecosystem Cloud. Yet steady growth is only sustainable if the company can work quickly enough to meet the needs of an expanding set of customers. Customers are willing to forgive when their vendors are responsive, but quickly lose patience if they don’t see steady progress.

Figure 1. WorkSpan’s Ecosystem Cloud: Strengths, Weaknesses, Opportunities and Threats

STRENGTHS	WEAKNESSES
• Ecosystem mindset • Pricing model • Scope of capabilities • Adaptability and responsiveness • Integration options • Investors and customer base	• Onboarding and adoption hurdles • Integration work in progress • Ease of use
OPPORTUNITIES	THREATS
• Onboarding jump-start programs • Additional analytics and automations • Identifying new ecosystem best practices • Expanding beyond IT sector	• Building critical mass • “Yet another tool” syndrome • Competition from PRM players • Managing growth

Source: Constellation Research

RECOMMENDATIONS

If your organization is a large or midsize technology provider, consider WorkSpan’s Ecosystem Cloud as an alternative to PRM. Even if you still operate in a more traditional one-to-one partner go-to-market model, you stand to benefit from the Ecosystem Cloud. It offers a comprehensive set of capabilities from managing joint funds to coordinating and tracking joint activity and results. The ability to integrate with other systems improves visibility without duplicating efforts or data. More importantly, Ecosystem Cloud is positioned to facilitate—and potentially influence—how successful partner joint sales and marketing will be done in the future.

If you are already going to market with offerings that involve multiple partners, or are considering doing so, Ecosystem Cloud is the only viable option on the market today to support this distinct model.

WorkSpan's Ecosystem Cloud capabilities are rapidly expanding and evolving. Although there are still a few kinks to be worked out, the company receives high marks from customers for its responsiveness and willingness to adapt quickly.

Using Ecosystem Cloud effectively requires concerted effort on the part of all partners. Most important are effective internal communication and adoption programs to support new users. Demonstrating the value of the system in individual roles drives usage.

As with any type of digital transformation, simply comparing current capabilities or functionality isn't enough. In order to adapt to constantly changing environments, intelligent enterprises must invest in capabilities that provide options to change and adapt their own operations in the near future. Missing out on the ability to succeed in technology ecosystems could prove both career-limiting and harmful to business.

RELATED RESEARCH

- Cindy Zhou, "Alliance Automation Platforms Drive Joint Marketing and Sales Effectiveness," Constellation Research, March 6, 2018. <https://www.constellationr.com/research/alliance-automation-platforms-drive-joint-marketing-and-sales-effectiveness>

ENDNOTES

- ¹ “Apple, Cisco, Allianz, Aon Partner in Cyber Risk Management,” Dark Reading, February 5, 2018. <https://www.darkreading.com/risk/apple-cisco-allianz-aon-partner-in-cyber-risk-management/d/d-id/1330976>

ANALYST BIO

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Nicole France is Vice President and Principal Analyst at Constellation Research, focusing on digital marketing, sales effectiveness and customer experience. Her research examines the interrelationship between sales, marketing and customer engagement and how to make it work effectively. She focuses on the migration path from traditional CRM to next-generation customer engagement strategies. Her work helps both vendors and enterprises to get the most from their investments.

With over 20 years of experience as both a technology analyst and marketer, France has a unique perspective on the trends and practicalities of effective customer engagement. She has held wide range of marketing roles, including market intelligence, offering marketing, industry marketing and C-suite thought leadership, at *Fujitsu*, *Equinix* and *Cisco*. France was previously a research director at *Gartner*, which she joined through the acquisition of *G2R*, and senior editor at *ITSMA*. France has a Bachelor of Arts in Political Economy from the University of California, Berkeley.

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