Basic, Intermediate, Advanced: An At-a-Glance Guide to Channel Marketing
About This Guide

Developed by CompTIA’s Channel Development Advisory Council to help vendors understand the best practices for marketing through the channel and enable channel partner marketing activities, this guide includes modern marketing tactics such as digital marketing, events, thought leadership, and social media with an emphasis on how to drive engagement in a hybrid world. Quickly assess your partner’s marketing capabilities, then use the simple, visual cards and lists to determine how best to begin your marketing journey or supplement existing marketing strategies.
Sizing Up a Channel Partner’s Marketing Capabilities

How advanced is your channel partner’s marketing capabilities?
Use the following table to determine where your partner stands.
<table>
<thead>
<tr>
<th>Basic Marketing</th>
<th>Intermediate Marketing</th>
<th>Advanced Marketing</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Size of Marketing staff</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No dedicated marketing staff</td>
<td>2+ dedicated marketing staff or outsourced marketing agency</td>
<td>5+ dedicated marketing staff and outsourced agency</td>
</tr>
<tr>
<td><strong>Vertical focus/specialization</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>May not have a vertical focus</td>
<td>May focus in 1-2 vertical markets</td>
<td>May have multiple vertical market practices with subject matter experts on staff</td>
</tr>
<tr>
<td><strong>Marketing process maturity</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No formal process in place</td>
<td>Some formal processes, but may not have programs for vendors to leverage</td>
<td>Formal marketing programs and processes to accommodate vendor engagement</td>
</tr>
<tr>
<td>Marketing is likely focused on company or single-vendor products</td>
<td>May have developed an approach to messaging a multi-vendor solution</td>
<td>Likely has formal practice areas where marketing may be vendor agnostic</td>
</tr>
<tr>
<td><strong>Solutions orientation/multi-vendor approach</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>May have company social accounts but minimal activity</td>
<td>Posts regularly on social accounts, moderate engagement with networks</td>
<td>Regularly posts multimedia elements on social accounts, sales team actively leverages social</td>
</tr>
<tr>
<td><strong>Digital marketing presence</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Basic website</td>
<td>May have a robust website with eCommerce; leverages some SEO</td>
<td>Robust website, leverages SEO and AI; may have full eCommerce capabilities</td>
</tr>
<tr>
<td>Ad-hoc experience managing and utilizing vendor MDF</td>
<td>Likely to have a process to manage co-op and resources to build custom campaigns with vendor MDF</td>
<td>Likely to have sophisticated co-op tracking tools, pre-built campaigns for MDF and resources to engage vendors</td>
</tr>
<tr>
<td><strong>Web presence</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less than 2% of revenue</td>
<td>2%-6% of revenue</td>
<td>More than 6% of revenue</td>
</tr>
<tr>
<td>Marketing spend as a percentage of revenue</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No or minimal tools or marketing platforms</td>
<td>Leverages free or vendor-provided tools and platforms</td>
<td>Has a full marketing automation platform</td>
</tr>
<tr>
<td><strong>Size of customer and prospect database</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Small</td>
<td>Medium</td>
<td>Large</td>
</tr>
<tr>
<td><strong>Quality of customer and prospect data</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Limited database</td>
<td>Moderate database with customer contact information; possibly appended with past product purchases</td>
<td>Extensive customer profiles, data appended with external information and past product purchases</td>
</tr>
</tbody>
</table>
Vendor Channel Marketing Objectives

Once you’ve determined your channel partner’s marketing capabilities, you need to outline your marketing objectives. These objectives should:

1. Define success metrics and expected outcomes.
2. Include guidance on how to engage.
3. Focus on resources the vendor will need to provide.
### STEP 1: Define success metrics and expected outcomes.

- ROI on partner investment (activity, event, etc.)
- Geographic reach
- Customer reach
- Number of quality leads from an event
- Leads to opportunity
- Partner revenue growth
- Number of end customers acquired (vertical, horizontal)
- Digital engagement metric (downloads, attendance, etc.)
- Number of logo acquisitions
- Solution adoption and use of solution growth
- CPGA or CAC reduction (partner) - Help MSP to their customer

### STEP 2: Include guidance on how to engage partners.

- Understand partner’s maturity
- Provide to-partner content and through-partner content
- Discuss and outline GTM strategies (vertical, IB, growth, acquisition)
- Outline channel enablement (sales, customer) for “frictionless engagement”
- Provide anatomy of customer journey (sales, onboarding, ongoing support) to help with driving ease of business
- Create a self-service process or tool
- Tier partners and align marketing elements with partner tiered program
- Build content once to be co-brandable and used by multiple partners

### STEP 3: Focus on resources the vendor will need to provide.

- Field marketing people to help
  - Pre-made kits (campaigns, documents)
- Awareness (awards, news release)
- Training – social selling, how-to drive campaign, etc.
- Monetary resources (MDF, co-op)
- Systems (CRM, PRM, social media management platform)
- Support (1:1, 1-to-many, office hours)
- Co-selling and marketing (i.e., jump on call, host webinar)
- Incentives (SPIFs)
  - Event content (banners, tablecloths, swag; marketing as a service)
- Event support (virtual and live) - can help being there or back-end lead scrub.
You’re ready to choose your engagement tactics. Knowing your channel partner’s marketing capabilities, you can determine which tactics are manageable based on available resources and expertise. Your marketing efforts should focus on five categories of tactics:

Channel Engagement Tactics
Content Creation/Digital Assets
Live, Virtual & Hybrid Events
Social Selling/Social Media
Communities & Alliances
Distribution Marketing
High quality content and digital assets can impact everything from a website’s search engine optimization to customer satisfaction.
### Basic Tactics
- White labeled/co-branded content
- Vendor prerecorded content promotion
  - Website copy
  - SEO website
  - Battle cards
  - Product slicks
- Email templates
- Surveys
- Telemarketing services

### Intermediate Tactics
- Targeted white-label content
  - Blog creation
  - Case studies
- Customer reference
- Database of customers
- Deployment platform
- Marketing automation platform
- Vendor live stream/content
- Purchase lead lists

### Advanced Tactics
- Website content syndication
- Video snippets or custom video
  - Demos/training
  - E-books
- Customer references (video testimonials)
- Whitepapers
- Analyst content
- Nurturing/drip content
  - Digital plug-in tools for channel
Participation in events (or hosting your own events) helps maintain visibility, build company/brand awareness, generate leads, and build relationships.
<table>
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<tr>
<th>BASIC TACTICS</th>
<th>INTERMEDIATE TACTICS</th>
<th>ADVANCED TACTICS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Webinars</td>
<td>Live streams (LinkedIn, YouTube, Facebook, Clubhouse)</td>
<td>Conference (multi-session/multi-day)</td>
</tr>
<tr>
<td>Planning assistance</td>
<td>Podcasts</td>
<td>Master class (business training, thought leadership)</td>
</tr>
<tr>
<td>Vendor prerecorded content promotion</td>
<td>Social events</td>
<td>Technical boot camps</td>
</tr>
<tr>
<td>Email invite templates</td>
<td>Sponsored charity events</td>
<td>“Birds of a feather” events (i.e., women in the channel)</td>
</tr>
<tr>
<td>Virtual product demos</td>
<td>Sporting events</td>
<td>Platforms (enterprise)</td>
</tr>
<tr>
<td>Attendee incentives and promotions</td>
<td>Competition events</td>
<td>Speakers</td>
</tr>
<tr>
<td>Local events (chamber of commerce)</td>
<td></td>
<td></td>
</tr>
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Social media marketing and social selling refer to using social networks like LinkedIn, Twitter and YouTube to share content, engage followers, drive traffic to a website, improve company/brand awareness, and build relationships—among other marketing goals.
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</tr>
</thead>
<tbody>
<tr>
<td>Optimized LinkedIn profile</td>
<td>Blog distribution</td>
<td>High social index</td>
</tr>
<tr>
<td>Content syndication</td>
<td>Video content (YouTube, Twitch)</td>
<td>Well-recognized brand (organic engagement)</td>
</tr>
<tr>
<td>Social posts</td>
<td>Webinars</td>
<td>Dedicated budget</td>
</tr>
<tr>
<td>Updated business profiles (Google, LinkedIn, Facebook, Twitter)</td>
<td>Engagement platforms (Hootsuite, etc.)</td>
<td>Content rebroadcasting</td>
</tr>
<tr>
<td>Consistency</td>
<td>Social polling</td>
<td>Repurposing content (video, print, audio)</td>
</tr>
<tr>
<td>Planning your approach</td>
<td>Social selling enablement</td>
<td>Social selling training</td>
</tr>
</tbody>
</table>
Community and alliance marketing can include marketing to groups of like-minded business professionals that meet your target audience needs or building communities with your partners.
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</thead>
<tbody>
<tr>
<td>Sponsor existing channel community</td>
<td>Form partner advisory council</td>
<td>Form your own channel community</td>
</tr>
<tr>
<td>Informal referrals for service partners</td>
<td>Leverage third-party network for service delivery</td>
<td>Form your own service network</td>
</tr>
<tr>
<td>Document and share alliance partners (complementary tech companies, ISVs)</td>
<td>Formal engagement with alliance partners (joint training, marketing, selling, referrals, etc.)</td>
<td>Mature transactional/project process with alliance partners (API-integrations, business consulting, road map)</td>
</tr>
<tr>
<td>Communicate key industry events (engage partners)</td>
<td>Integrate your own events with industry events (increased level of participation)</td>
<td>Develop forums/user groups (must be moderated)</td>
</tr>
<tr>
<td>Exclusive resources and incentives</td>
<td></td>
<td>Host your own partner events</td>
</tr>
</tbody>
</table>
How you plan to get your products, goods and services to end customers is key to rounding out your marketing tactics.
**BASIC TACTICS**
- Partner recruitment and activation
- Sales training
- Events/tradeshows
- Floor days
- SPIFs
- Web content
- Email campaigns
- Channel advertising

**INTERMEDIATE TACTICS**
- Partner enablement
- Category selling (multi-vendor)
- Marketplace integration
- Funded sales resources
- End-user demand generation
- Communities
- Contests/incentives
- Attach programs

**ADVANCED TACTICS**
- Long-tail partner management
- Pre- and post-sale technical support programs
- Product bundling
- BI programs
- Top tier award programs ("winners club")
- End-customer advertising
Additional Resources
Marketing Toolkit for MSPs
Cloud Applications Playbook
The Technology Buyer’s Journey
Vendor Channel Readiness Assessment
About the Channel Development Advisory Council

The Channel Development Advisory Council leverages the expertise and experience of its members to develop educational programs, business tools and other resources to promote the business value the technology channel brings to the tech industry. In addition, the council collaborates with CompTIA’s other industry advisory councils to advance the adoption of SaaS-based business applications, drone services, blockchain, artificial intelligence, cybersecurity and internet of things technologies. Learn more.