



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.



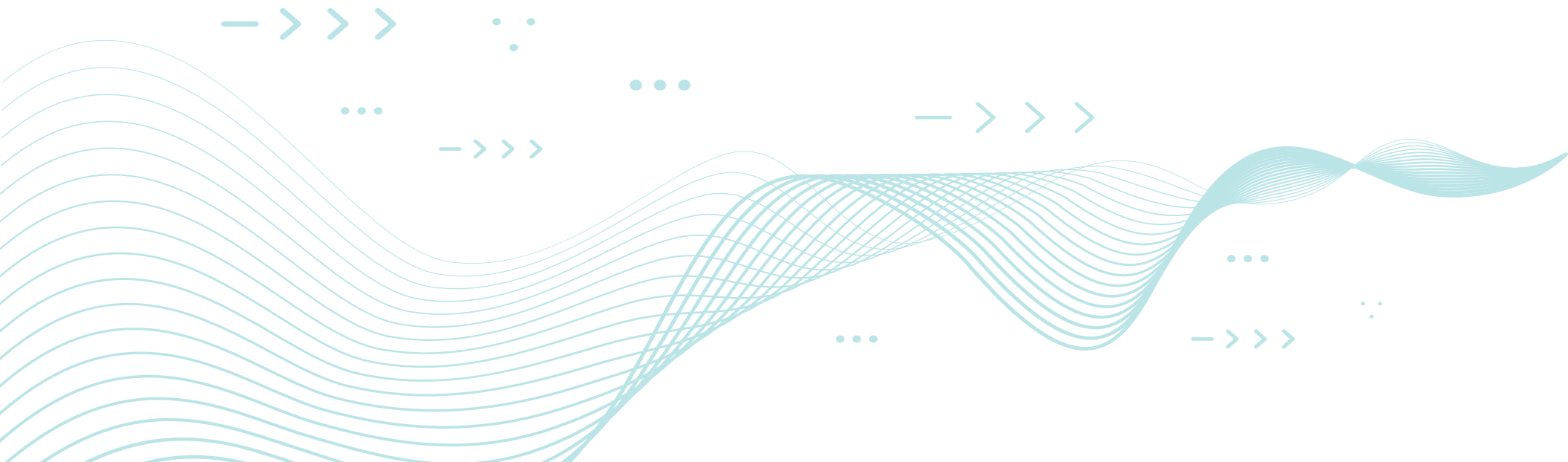
**BASIC
MARKETING****INTERMEDIATE
MARKETING****ADVANCED
MARKETING**

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

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, on-going 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.

Channel Engagement Tactics

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:



**Content
Creation/Digital
Assets**

**Live, Virtual &
Hybrid Events**

**Social Selling/
Social Media**

**Communities &
Alliances**

**Distribution
Marketing**

Content Creation/ Digital Assets

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

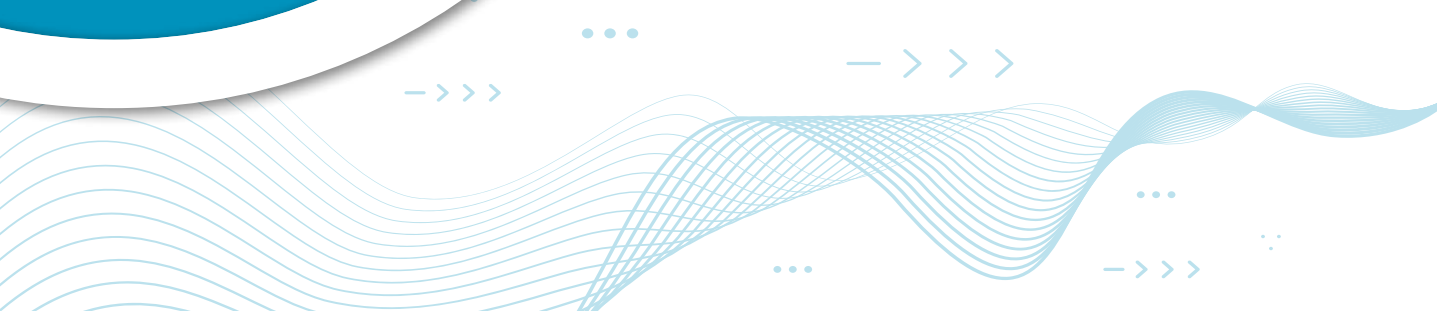
Targeted white-label content
Blog creation
Case studies
Customer reference
Database of customers
Deployment platform
Marketing automation platform
Vendor live stream/content
Purchase lead lists

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

**Live,
Virtual
and
Hybrid
Events**

Participation in events (or hosting your own events) helps maintain visibility, build company/brand awareness, generate leads, and build relationships.



BASIC TACTICS

Webinars
Planning assistance
Vendor prerecorded content promotion
Email invite templates
Virtual product demos
Attendee incentives and promotions
Local events (chamber of commerce)

INTERMEDIATE TACTICS

Live streams (LinkedIn, YouTube, Facebook, Clubhouse)
Podcasts
Social events
Sponsored charity events
Sporting events
Competition events

ADVANCED TACTICS

Conference (multi-session/ multi-day)
Master class (business training, thought leadership)
Technical boot camps
“Birds of a feather” events (i.e., women in the channel)
Platforms (enterprise)
Speakers

Social Selling/ Social Media

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.

BASIC TACTICS

Optimized LinkedIn profile
Content syndication
Social posts
Updated business profiles
(Google, LinkedIn, Facebook,
Twitter)
Consistency
Planning your approach

INTERMEDIATE TACTICS

Blog distribution
Video content (YouTube,
Twitch)
Webinars
Engagement platforms
(Hootsuite, etc.)
Social polling
Social selling enablement

ADVANCED TACTICS

High social index
Well-recognized brand
(organic engagement)
Dedicated budget
Content rebroadcasting
Repurposing content (video,
print, audio)
Social selling training

Communities & Alliances

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.



BASIC TACTICS

**Sponsor existing channel
community**

**Informal referrals for service
partners**

**Document and share alliance
partners (complementary
tech companies, ISVs)**

**Communicate key industry
events (engage partners)**

**Exclusive resources and
incentives**

INTERMEDIATE TACTICS

**Form partner advisory
council**

**Leverage third-party
network for service delivery**

**Formal engagement with
alliance partners (joint
training, marketing, selling,
referrals, etc.)**

**Integrate your own
events with industry
events (increased level of
participation)**

ADVANCED TACTICS

**Form your own channel
community**

**Form your own service
network**

**Mature transactional/
project process with alliance
partners (API-integrations,
business consulting, road
map)**

**Develop forums/user groups
(must be moderated)**

**Host your own partner
events**

Distribution Marketing

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.](#)