PRM Core Platform

Supercharge Your Channel! Our **Winning Edge 365 Suite** is the most advanced, cloud-based **Partner Relationship Management** solution to onboard, nurture, reward and empower your channel partners. Built on the world's most powerful platform, you have the assurance of the best uptime guarantee in the business (99.9%). Microsoft Dynamics 365 harnesses the power of AI and Machine Learning to continuously enhance the relevance of the platform.

Microsoft's acquisition of LinkedIn, coupled with Microsoft Social Engagement, provides valuable insights into the sales process. Unparalleled scalability, global reach, and security adds up to a winning combination. That's why we call it Winning Edge 365. We think you'll see why.

Partner Portal

Partner Recruiting/Onboarding

Opportunity/Deal Registration

Business Plans

Asset Library Management

Training & Certification

Notification Engine

Reporting and Analytics

Partner Portal

Give your B2B partners a true B2C experience. Customer experience is more important than ever—even for your business partners. Partners want an intuitive, easy-to-use interface they can use anytime, anywhere. Our mobile-responsive design gives partners instant access to every feature available from their laptops, including file uploads and notifications.

Security is priority one, so all connections are fully encrypted and the latest authentication protocols supported. Self-service is the name of the game, so everything from password resets to knowledge base search empower your partners and reduce the demands on your staff and efficiently manage the channel.

Feature List

- ❖ Secure, mobile-responsive design gives partners anywhere, anytime access

- ❖ B2C customer experience for B2B partners

- ❖ Content Management System (CMS)

- ❖ Partner self-service for user management and password reset

- ❖ Multi-Language, multi-currency enabled

- ❖ GDPR compliant

- ❖ Variety of authentication models including Azure AD B2C, OAuth2, OpenID, SAML 2.0
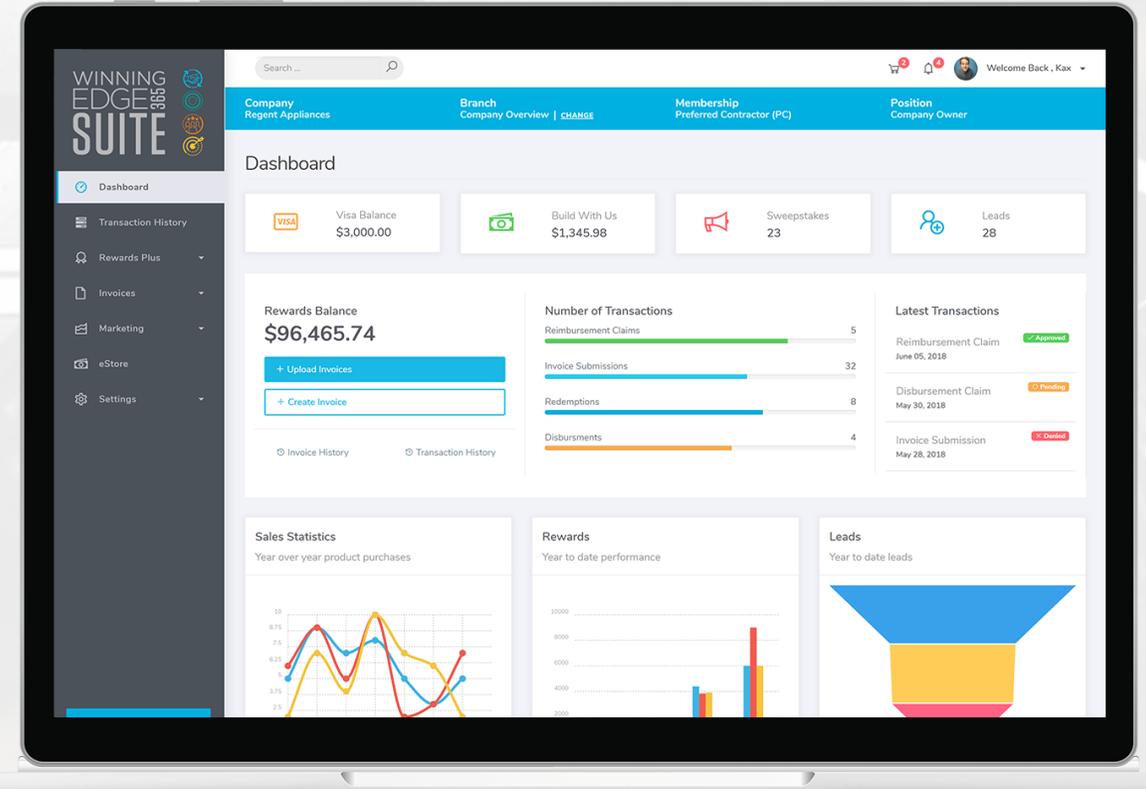
Partner Recruiting/Onboarding

You not only need to find new partners, you need to find the right partners. The digital age has posed many challenges and disruptions, taking down not only iconic companies but even entire industries.

Winning Edge 365 is designed to turn those challenges into opportunities. Remember, partners have a variety of options and it's essential that your program is relevant and rewarding. Identify and onboard partners in a personalized and efficient way, utilizing automated workflows to deliver an amazing customer experience. And don't worry—we handle complex partner structures that include multiple locations and multiple user roles.

❖ Ditch the spreadsheets, paperwork and tedious processes

❖ To-Partner Marketing to attract the best partners

❖ Partner sign-up with back-office approval

❖ Configurable pre-access to portal for contract acceptance and guided-tour training

❖ Administrative dashboards for evaluating and approving potential partners

❖ Notifications to keep everyone informed throughout the process
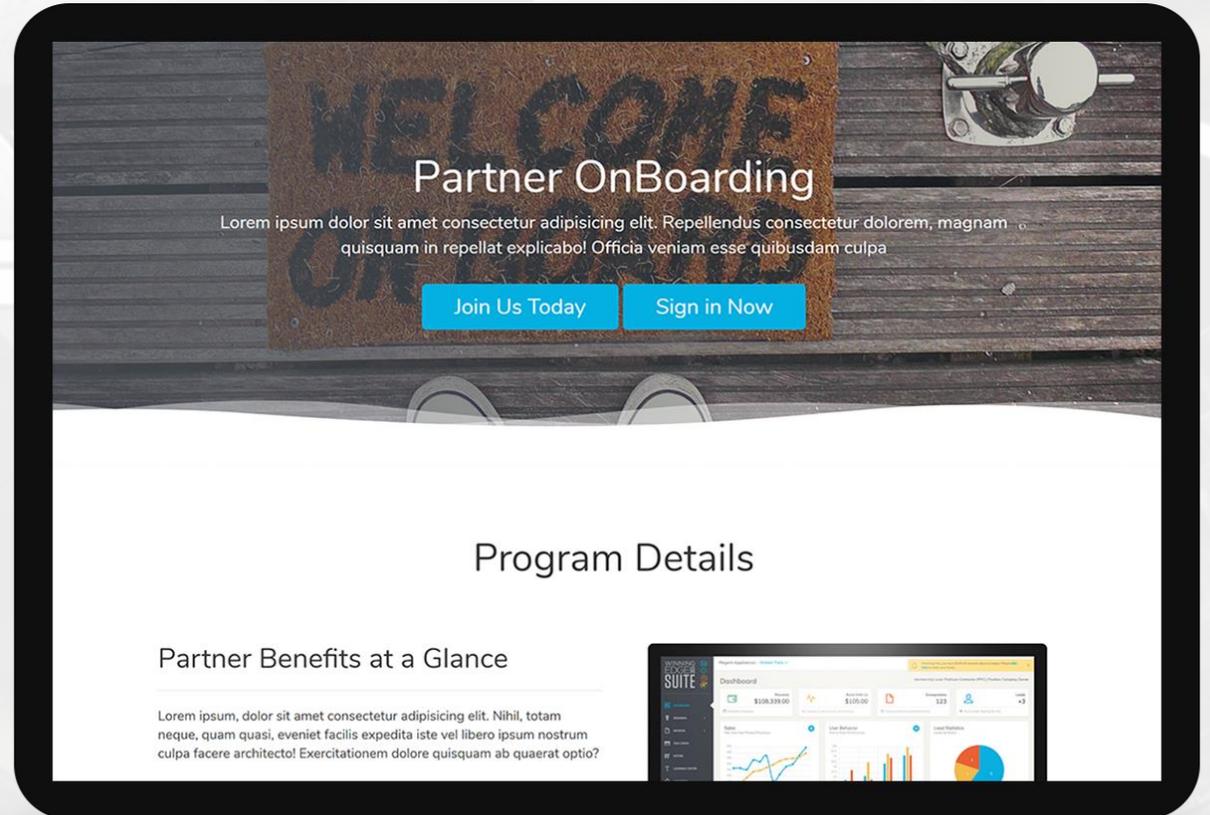
Opportunity/Deal Registration

You want to have insight not only into your internal pipeline, but into your indirect channel partner's pipeline. Deal registration by the partner reduces channel conflicts and builds brand trust as the company demonstrates loyalty to the partner. The channel manager can offer opportunities to their partners--to be accepted or declined--or partners can register their own opportunities.

Offered opportunities allow sophisticated collaboration between company and partner, including discount pricing arrangements. Although deal registrations are inherently valuable as channel 'contracts', partners can be financially rewarded in a number of additional ways through the Loyalty Edge module.

❖ Deal registration

❖ Channel conflict avoidance

❖ Collaborative opportunity management

❖ Rule-based distribution of opportunities to the most effective partners based on geography, program tier and win rate

❖ Expiration and redistribution processes

❖ Insights into partner pipeline
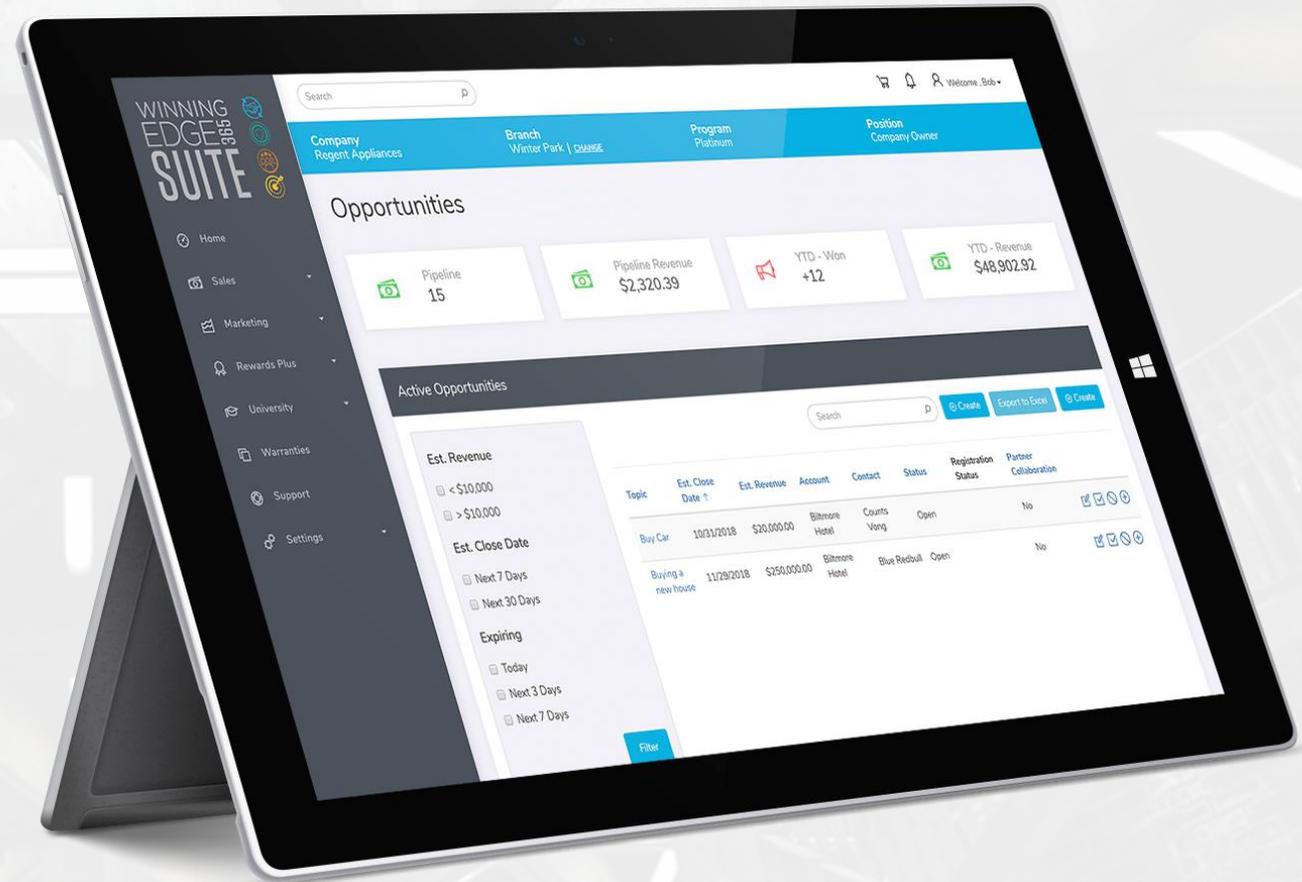
Business Plans

Both company and partner can benefit from the collaborative development of a partner business plan. Through the business plan, expectations between company and partner can be clearly established. More importantly, the company can demonstrate investment in the partner by sharing best practices, marketing techniques, training, certifications and performance expectations.

Since program tier benefits are often linked to partner performance, this tool can be of enormous benefit to both parties. As opportunities are registered and won, valuable performance analytics can be easily tracked throughout the channel.

Feature List

❖ Business plan development with partner

❖ Set quarterly and annual revenue goals

❖ Commit to your partners success with specific business strategy and marketing ideas

❖ Convert marketing strategy into MDF requests

❖ Track partner performance and proactively build the partner relationship
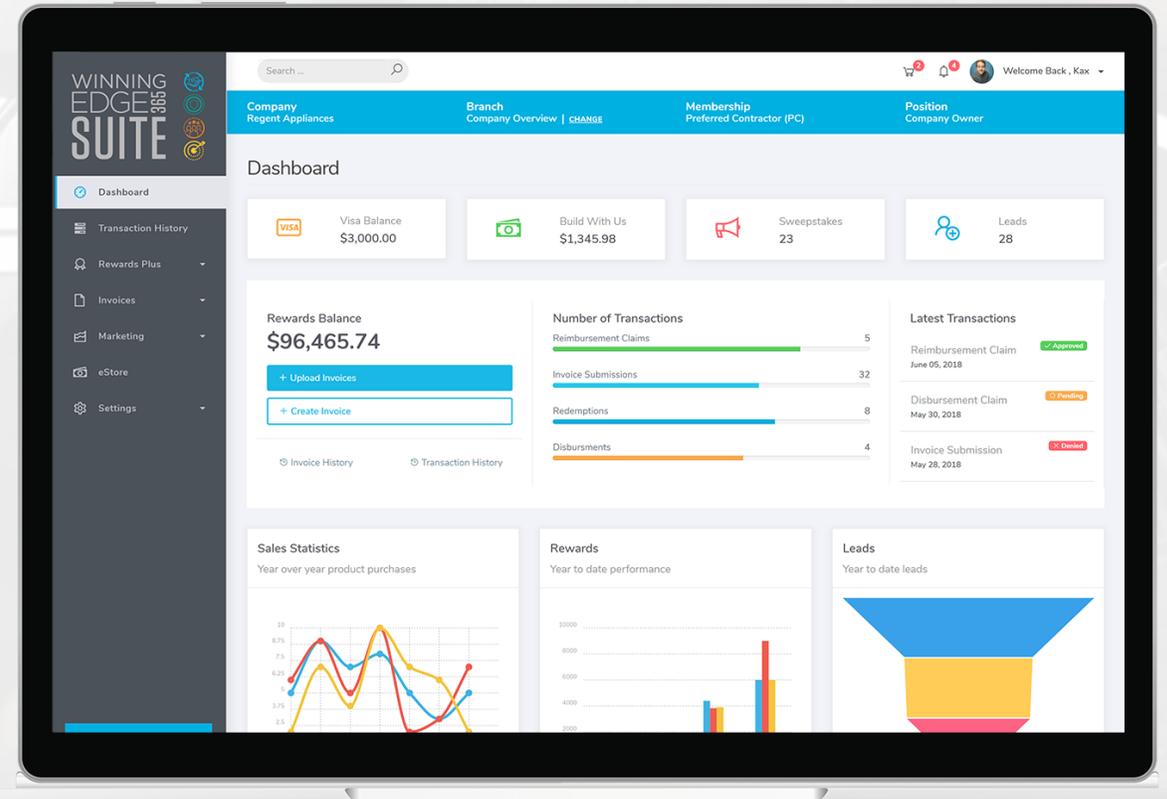
Asset Library Management

Getting the right collateral into the right hands at the right time can be a major hassle. With our asset management system, you can easily upload documents for immediate access by your partners--always up-to-date and available for download.

Designate documents as white papers, case studies, product sheets, installation guides, marketing collateral—you name it. Your partners will be able to easily find what they need utilizing a variety of filters.

Additionally, make your marketing collateral and other documents tier-specific to deliver precisely what's appropriate for that partner.

❖ Eliminate partner frustration with outdated material and digging through emails in search for the right material

❖ Mobile-responsive for anytime, anywhere access to the latest assets

❖ Designate assets by type for easy filtering by case study, white paper, product literature, installation guides and more

❖ Tier-specific assets and marketing collateral easily designated and searched

Contract Management

Your program agreements, terms & conditions and guidelines are essential for the smooth operation of your partner channel as well as meeting important legal requirements.

Our easy contract versioning system enables you to easily create, update and distribute contracts. Contracts can be unique by program or by program tier and be distributed with the click of a button.

You designate which partner roles can accept a contract upon login, and other users are locked out until the contract is accepted. You'll have full visibility into which partner contact accepted the contract, and when.

❖ Partners must accept Terms & Conditions before users can access the portal

❖ Only designated roles can accept T&C; acceptance prompted on login attempt

❖ T&C can be program-specific or tier-specific for precision control

❖ T&C acceptance audit history includes who accepted agreement

❖ Easy T&C version control

❖ One-click to distribute updated T&C to all affected partners at any time

❖ Reporting and analytics of T&C acceptance
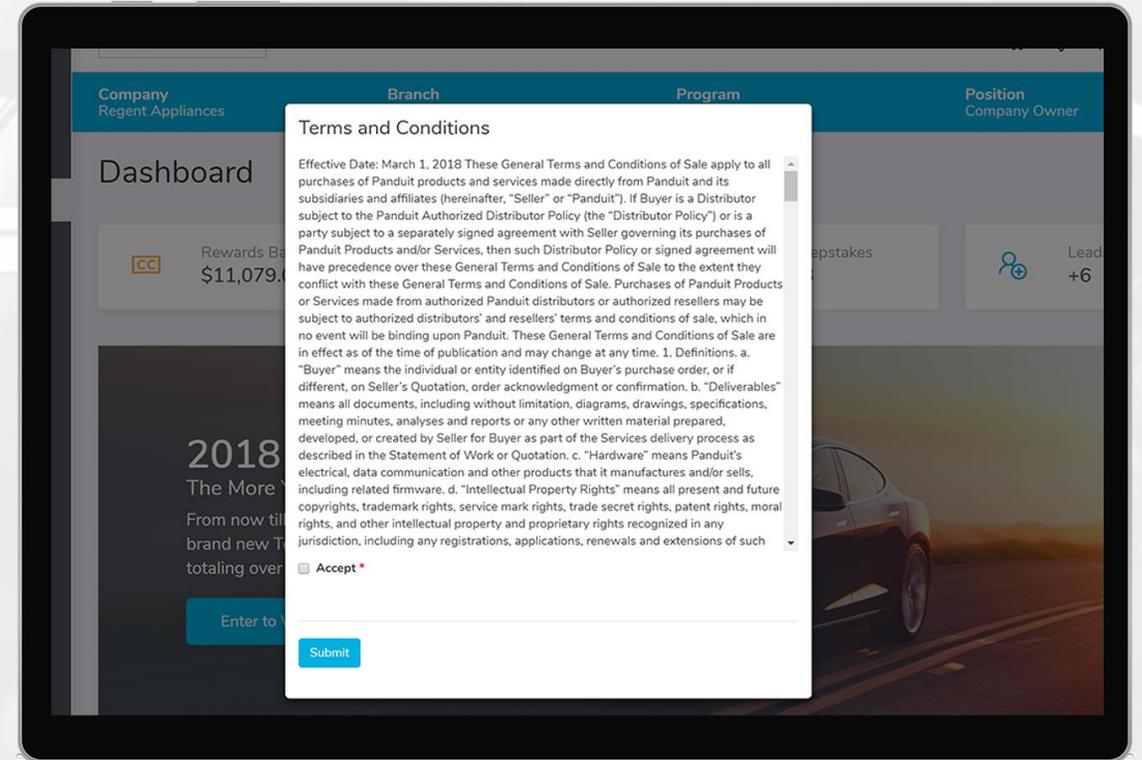
Training & Certification

Your partners need training to deliver the absolute best quality product to your end customers. Winning Edge 365 API provides for integration with your favorite LMS system.

Our solution allows users to request training funds, tracks their progress, sends notifications, and gives visibility into the certification status to the company and channel.

You'll have the power to define rules directing the number and types of certifications required to achieve a certain accreditation. Certifications and accreditations can be used in lead routing, opportunity routing, program tier qualification and reward earning rules.

Feature List

- ❖ Certification tracking for individual employees

- ❖ Accreditation tracking at company level

- ❖ Automatic, rule-based accreditation calculations

- ❖ Full visibility into company and individual progress

- ❖ Connect to any LMS system with an API

- ❖ Notification reminders and updates

Notification Engine

No system would be complete without a robust notification engine to keep everyone informed. Notifications can be company-level ("Platinum Accreditation Achieved!") or individual-level ("Sweepstake entry earned!").

Each user can specify the types of notifications they want to receive, and whether they want to only see them in the partner portal or get email and/or SMS messages as well.

Partner owners and administrators can easily see the entire history of notifications and can apply numerous filters to track specific trails of events.

- Real-time notifications based on PRM events

- Full user-preference designation on types of notifications to receive.

- Notification available by email, text and portal notification icon

- Company-specific notifications restricted to designated roles

- Notification audit trail for both partner and channel manager
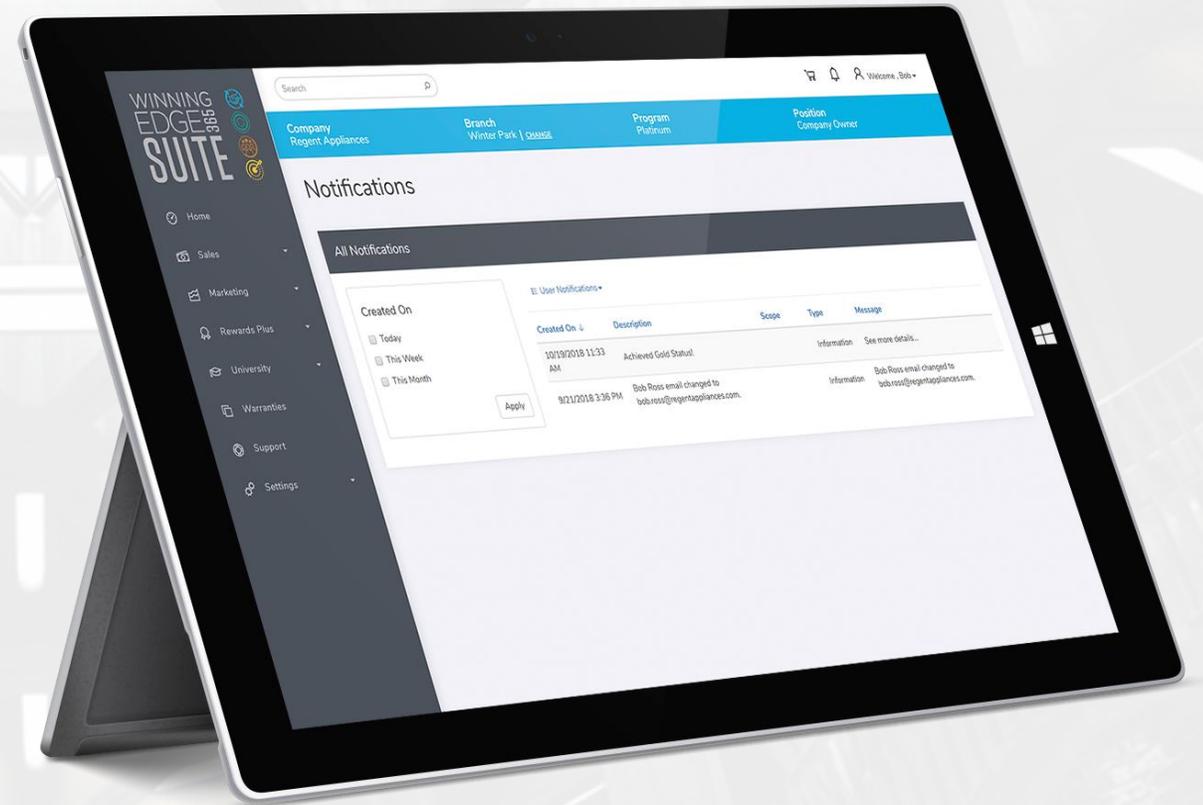
Reporting & Anaytics

Winning Edge 365 comes with plenty of out-of-the-box reports, charts and dashboards, but you'll also have access to an easy and intuitive interface for generating custom reports, charts and dashboards. Both channel manager and partner will be able to track all types of activity, from partner performance to ROI.

One of the greatest benefits of the platform is the option to combine CRM + PRM into a single platform, allowing a true 360-degree view of the entire enterprise.   No other system *anywhere* can provide that depth of *native* reporting and analytics. Now that's true digital transformation.

Feature List

❖ Real-time data reporting. Native data means no outdated information. Ever.

❖ Out-of-the-box reports and dashboards

❖ Customizable reports and dashboards

❖ Track partner program performance

❖ Segment data with advanced drill-down with Microsoft Power BI

❖ Intelligent insights for intelligent business decisions