



Telephone Partner Account Management Case Study

Customer Overview

A worldwide leader in software, services and solutions, this customer helps people and businesses realize their full potential.

One segment of this global company's product solution includes a line of business management applications that automate and streamline financial, customer relationship management, and supply chain processes. Markets served by these applications include retailers, manufacturers, wholesale distributors, and service companies operating worldwide. The customer sells its products and service through authorized channel partners.

Business Challenge

Our customer uses a network of more than 13,000 independent partners in the U.S. to market, distribute and service their products. Using internal staff to maintain working relationships with this large number of partners had become unrealistic and cost prohibitive. The customer needed to find a contact solution that would substantially increase its ratio of managed partners to sales resources, drive expanded product sales through the channel, and increase partner satisfaction. The partner channel required easy accessibility to resources, representatives with broad knowledge of the customer's products and services, an understanding of how to navigate the marketing and sales organization, and the ability to provide assistance with marketing and business plans to expand their businesses.

SEI Solution

SEI developed a plan that would leverage a team of telephone-based professionals with exceptional sales skills, an in-depth understanding of sales and marketing processes, and a broad understanding of the customer's products and services. These Telephone Partner Account Managers (tPAMs) would interact with the customer's partners on a mutually agreed cadence (daily, weekly, monthly) to provide direct attention as an extension of the customer's own inside sales team..

As part of the implementation plan, the SEI's tPAMs collaborated with the customer team to identify target partners, develop profile and segmentation plans, and initiate a comprehensive engagement plan to build positive relationships between the customer and partner community. The implementation of the contact plan was well orchestrated — the customer team focused on strategy development and direction, and the SEI tPAM team focused on day-to-day execution and performance metrics.

Quality is a key to the success of this program; the SEI team uses a variety of monitoring and coaching techniques to support the development of our tPAM resources.

Side-by-Side Coaching – SEI sales team leaders regularly conduct 1-on-1 coaching sessions with our tPAMs to review positive results and development areas

Remote Monitoring – the SEI team evaluates calls through remote monitoring techniques and provides detailed feedback using a Six Sigma™-based methodology

- Regular Evaluation of Results – progress against pipeline revenue goals is monitored and reviewed on a daily basis to proactively show tPAMs their accomplishments against their goals

Tangible Results

The SEI tPAM solution continues to gain popularity with both the customer and the partner community. In a short period of time, the resources dedicated to this customer solution have doubled as the success of this service has caught momentum throughout the partner channel.

These positive partner relationships have resulted in satisfaction scores that are 25% above expectation, annuity renewal rates increased by 8 percentage points, and pipeline revenue capture that is 32% over plan.

SEI Strategy

From the beginning, SEI took the time to understand and identify this customer's business strengths and development areas. SEI then developed the tPAM approach to execute against tangible sales targets, and drive efficiency and productivity through thought leadership.