



This paper addresses a Best Practice Process for driving channel revenues and measuring the results of the effort in terms of program Return on Investment (ROI).

Sales performance goals can be met, and sufficient pipelines of new opportunities created to attain future sales goals, by building and sustaining motivated relationships within and among the vendors (IT/ISV/Telecom) and channel companies (distributors, integrators, VARs, Solution Providers, and MSPs) comprising the high tech sales channel. These needs, common to both vendor and Channel Company are understood, addressed, assigned, accomplished and measured in detail with Channel CARMA<sup>SM</sup> business development solutions.

Channel CARMA solutions are deployed as measurable and motivational business development frameworks created to drive revenues and build motivated, loyal relationships among the people who manage sales and marketing budgets at technology vendors and IT service companies. The process was developed by hands-on channel sales and marketing experts with a deep first-hand understanding of what it takes to be successful in the channel. The creation of the process and its equitable deployment by all the participating companies is based on thousands of face-to-face sales calls within channel environments and hundreds of joint vendor/channel strategy sessions and execution activities. Many of those activities include extensive communication with the end customer IT decision makers and business executives who recommend and purchase technology to make their businesses strong and able.

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This paper is based on the following premises and fundamental principles:

- Revenue for both the technology vendor and the channel business are the primary need.
- Measuring the ROI on the effort to produce the revenue is essential.
- The Channel has attained a post-enablement state where motivational appeal and collective efforts are forces that far surpass enablement for both meeting short term goals and sustaining superior long term performance.
- Inertia is omnipresent within the channel ecosystem. Good inertia must be sustained or accelerated. Stationary or negative inertia must be overcome.
- Finding, qualifying, and closing new end customer opportunities and then nurturing the client, results in the opportunity to serve the Lifetime Value of a Customer and are central to the immediate and long term success of the technology vendor and channel company.
- Finding and fulfilling the needs of the end customer for technological business solutions is best done by vendor and channel working together and cannot be done unilaterally at the needed scale.
- The principles of Karma philosophy are applicable within a partnering ecosystem.

Channel CARMA solutions, focused on driving sales and new opportunity pipelines, are:

- Revenue Producing
- Process driven
- Scalable
- Measurable
- Equitable
- Motivational
- Logical
- Cost-effective
- Comprehensive
- Controllable
- Flexible

Channel CARMA solutions are a path to happiness ... with happiness in the high tech sales channel defined as:

- Revenue exceeding budget
- A pipeline full of hot and warm leads
- Intellectual assets from which to build future successes
- Closer, loyal relationships
- Objective measurement
- Motivated people working for a common purpose
- A prosperous present
- A bright future with a clear path leading to success for many people and companies

Channel CARMA solutions are:

- Not academic thesis
- Not based on filtered strategic observations from 50,000 feet
- Not hypothetical
- Not based on wishful thinking or brute force
- Not one-size-fits-all

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The channel environment consists of channel *partners*, vendor *partners*, solution *partners*, technology *partners*, business *partners*, *partnering* companies, *partnering* departments, and throughout the entire ecosystem, people working in *partnership*.

Partnering can be defined as relationships where by helping the other succeed, your own best interests are served.

Given the extreme use of partnering, it is right to examine Channel CARMA solutions as the path to attaining Channel Karma within the context of this partnering environment.

Knowing that nothing is by chance, Karma, as a philosophy is based on the concept of an "action" or "deed" as the root of the entire cycle of cause and effect. An action taken with good intent results in happiness. Within the Channel CARMA framework; collective, creative, and planned activities seeking betterment of the entirety are the path to happiness.

Channel CARMA programs build on Karma philosophy because they are designed from the start with virtuous intentions earmarked for the three distinct business entities and the people who manage them; that is the vendor, the channel business, and the ultimate end customer. The process is executed keeping the needs of all these stakeholders and their respective business entities in the foreground.

Channel CARMA, as a lead generation engine and channel development framework, is a pragmatic business process that is measurable and motivational ... and fulfills the needs of all the people involved ... as people, not as inanimate entities.

Relationships based on motivated people working together to succeed and solve the problems of the mutual customer is Good Karma. Relationships based on allowing people to find purpose by sharing their skills and utilizing their strengths is also Good Karma. Thus, inducing growth and success to the whole Channel Community (as it relates to a specific vendor) results in the creation of an environment of teamwork and trust. Furthermore, with the instantaneous spread of information, success in the Channel Community may quickly become success within the larger commercial and social communities with the success derivative

becoming a type of Good Will, in the financial sense.

It is worth repeating; partnering can be defined as relationships where by helping the other succeed, your own best interests are served.

And for people who work in a channel ecosystem, reaching the top is sweeter when celebrated with others. In fact, the only way to reach "the top" in ANY channel endeavor is "with others." The channel, by definition cannot be unilateral or isolated. As such, Good Karma results when good things (e.g. Channel CARMA engagement) are planned with good intentions being the desired result for many.

To establish Good Karma and enjoy the resulting good fortune, it is essential to understand the personal motivations and essential business needs driving the channel relationships. The Channel CARMA process builds on this understanding by addressing it within the program design and execution. It helps both vendor and channel by defining responsibility and assigning accountability. It then, through its processes, assures that the campaign is executed and audited fairly to both vendor and channel partner.

Who is it that would not treat their partner virtuously? That's not the question at hand. Rather, Channel CARMA processes define and focus on *who and when and how and what* partners can do together, today, at the dawn of the second decade of the third millennium, to attain another type of karma together with their partners, and to enjoy the resulting happiness.

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## CARMA: The Acronym

Channel CARMA Lead Generation Solutions include characteristics essential for establishing equitable and forward-looking business relationships. These characteristics maximize the likelihood of success for all the people and all the companies working together. CARMA is an acronym for:

- Control of messaging and resource deployment
  - Messaging
    - For vendor to meet their corporate communications guidelines within a scalable framework
    - For channel to showcase their customer-facing brand, skills, focus, experience
    - For end customer to understand that the partnership provides a solution to their need
  - Resources
    - For the vendor to judiciously invest marketing resources
    - For the channel to invest sales and technical resources
  
- Accountability
  - To define individual responsibilities within this Go-To-Market framework, plan, and process
  - To calculate and assess the individual and overall results through objective measurement
  
- Return On Investment
  - To create new, incremental revenue and measure the results
  - To understand the impact of the investment
  - To fulfill the acute need for due diligence and the calculation of the ROI of the effort
  
- Motivation
  - By helping people understand the plan and their role within it
  - By focusing people's efforts on what they do best while removing time-wasting obstacles
  - By evolving beyond enablement to the higher state and most fulfilling and prosperous environment of *motivated* partnerships
  
- Acceleration
  - Of filling the sales pipeline
  - Of the inertia of the partnering relationships
  - Of the solution to the customers' problems

## Generating New Business Opportunities and Measuring the Results

Qualified leads, a key performance indicator, are the lifeblood of the vendor/channel relationship leading to top line results. Warm and cool leads are often the sustenance that eventually produce the lifeblood... after a period of nurturing.

Channel CARMA solutions are designed and executed for the partnering IT vendors and services companies that must together generate top-line results and calculate the ROI on their effort. Quantifying the result and calculating the ROI of joint campaigns is the only way to objectively evaluate the result produced. Motivating all the people from all of the partnering companies is the best assurance of enthusiastic participation by all and, as such, maximizes results.

Channel CARMA Lead Generation Solutions begin by identifying end customers with business needs that can be resolved together, by the partnering vendor and channel companies. Consideration for the media the audiences use to gather information about the solutions to their needs is paramount to program design.

Channel CARMA solutions produce and measure:

- The number of hot, qualified end user leads generated during each campaign
- The number of warm and cool leads generated ... needing nurturing to close within 3 to 12 months
- Intellectual assets in the form of exceptional databases, including email addresses, created for and owned by the clients
- Sales results and pipelines indicating whether, and to what degree, the campaign has been successful to all involved, in whole and in part

Channel CARMA solutions are comprehensive and include and integrate most or all of the following:

- List development and augmentation, including the email addresses of decision makers
- Content, creative, and campaign offer; development and production
- Outbound email; HTML and rich HTML
- Audio/Visual sales collateral
- Social Media Marketing connectors
- Event support, if and as appropriate, including live or virtual activities
- Telemarketing and Call Center Services; including, script development, qualification and nurturing calls (as appropriate)
- Mid-stream analysis and, if necessary, correction of messaging or targeting
- TRACKING AND MEASUREMENT reports at numerous (six or more) milestones and at the campaign's conclusion, including:
  - Email sent
  - Email delivered
  - Email opened
  - Offers reviewed
  - Offers accepted
  - Offer commitments fulfilled
  - Teleservices comments
  - Forecasted value of the pipeline
  - Resulting revenue

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## Plan to succeed

Channel CARMA solutions provide the ideal structure for “live, in-the-field” sales and marketing planning sessions to engage, direct, and motivate the key people from vendor and Service Provider working together.

These local meetings, preferably done face-to-face, but suitable for webinar and/or conference calls, are the key elements to assure the highest likelihood of success. Remember, the goal of a Channel CARMA engagement is NOT to enable a partner. The goal is NOT to force people to participate. The goal is to MOTIVATE all people to excel. Superior results are achieved when all the people understand the bigger picture, their role within it, and the overall and individual best interests of all people involved.

After the corporate directions (in the form of appropriate prospective audiences, problem/solution messaging, and corporate identity guidelines) are established, local roll-outs can be used to:

- Review the program
- Agree to execute
- Set local goals
- Assign responsibilities
- Refine the target markets and specific accounts to align with the partner’s focus and skill set
- Capture the partner’s messaging and branding requirements
- Emphasize how the vendor expectations are respectful of the partner’s people’s time, and focused on their specific expertise
- Set dates and topics for follow up sales meetings; e.g. review results/pipeline, specific opportunities and related actions
- Train the partner organization
- Build camaraderie and a cooperative exchange of information
- Gain and sustain share-of-mind to advance the joint vendor/partner goals to extend beyond the discrete Channel CARMA activities.

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A relatively small amount of time invested by the vendor’s channel and sales reps in the local planning and roll out will yield high returns. Time spent in these areas is focused at or near the junction of buyer/seller interaction. Any accomplished sales manager will know that having their sales reps’ efforts focused at this critical point in the sales process is good Karma.

Furthermore matters best addressed and resolved at the corporate level are excluded from these field sessions.

## About the process ...

Attaining Channel Karma through Channel CARMA marketing processes:

Initial comments ... Serino Channel Services evolved this process based on deep first-hand understanding of the need to meet business development goals and to design and execute processes that work within a channel environment. The experience gained through years of channel sales, marketing, business development, support, finance, relationship management, and executive experience, in part (by each element) and in full (as a complete solution to a need) forms the basis of the Channel CARMA framework and its tactile execution.

We fully recognize the imperative need for vendors to maintain control over their brand and messaging while they gain economies with scalable marketing solutions. We also fully recognize that today, all resources, and especially human resources are scarce and valuable. When people (human resources) are empowered and motivated they produce the best return that can be expected. That is, they generate high Return on the Investment of both the human capital and the marketing budget. When people are merely enabled, they may or may not excel. Truth is, they may or may not even participate.

As such, marketing programs must not waste time, nor be perceived to waste time, especially the time of and sales people or channel managers. Instead, programs must be created and executed such that they allocate time judiciously and utilize it in a manner by which time resources will yield their highest returns.

On the other hand, it is ESSENTIAL that field and channel managers are very involved with one another's businesses, closely aligned, and in lock-step with their partners. As such, "some time" must be and is allocated for interaction among these people ... and suggested agendas are available to help scope and control the meeting's purpose. While high-level direction and messaging is accomplished at a corporate level, the field is called upon for local refinement of corporate programs, for sales lead follow up, and for in campaign reviews of the processes, progress, and success.

The people who work for field organization will clearly and immediately recognize the difference between programs that leverage their skills and respect the time ... and those that do not.

Motivation versus enablement.

Perhaps the most essential role a channel sales manager fulfills is in the joint planning of joint business development activities with their channel partner.

Splendid result: Motivation is achieved based on respect, pragmatism and the human understanding that **IT IS MUCH MORE FUN TO WIN ... AND EVEN MORE FUN TO WIN AS A GROUP AND SHARE THE HAPPINESS AND SUCCESS THAT COME FROM WINNING IN A TEAM ENVIRONMENT.**

But you have to be put in a position to win from the beginning. Too often, "channel marketing activities" do not put the key people in a position to win ... and they know it. Hence, they may be enabled ... but it is irrelevant because they are not motivated to extend the needed effort. In fact they may not exert any effort if they know it is a waste of their time.

People are motivated when they recognize they are part of a winning plan that utilizes them as valuable resources and both respects and relies upon their skills, talents, and time. That's why and how the most fundamental benefit is achieved ... motivation. People realize that their time and skills are NOT being wasted on superfluous actions, hidden agendas, or unilateral matters. Rather they know that their skills and time commitments are being CAREFULLY RATIONED, allocated to zoom in on their best audiences and on the actions that they are best suited to perform.

And ... it works both ways.

Regardless of whether the person is a vendor or channel employee, the respect and judicious use of their resources applies to both parties. As a result, both the partner reps and the vendor reps are motivated independently as unique people, and together, as a team. Enablement, on the other hand is the "Field of Dreams." "Build it and they will come" is a good Hollywood tagline ... but ineffective channel strategy ... and contrary to human nature.

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In this era of technological leap frog, business partners are not motivated to take action just because one vendor has a temporary technical advantage ... or a Partner Portal ... or a promotional contest to win a prize ... Enablement both sets the performance bar too low to make a difference and is based on faulty logic. *The people who work at channel companies are not seeking out ways to make their vendors successful. But they are seeking out ways to be successful with their vendors.*

The opportunity exists within the understanding of this nuance ... and on building programs with measurable processes that appeal to human needs.

Working together in a motivated manner to help people succeed is good Karma. It is also called good Channel CARMA execution. As you can see, Channel CARMA marketing solutions are created with respect to both karma/CARMA matters.

Perhaps the most essential role for the marketing management team (marketing, sales, and business executives) at a channel business is the integration of their effort and their vendors' effort without allowing the channel partners' skills to be subordinated to the vendors' technologies. This very factor (that is, subordinating skills to products) is the most likely reason that Partner Marketing Portals have been underutilized throughout the industry. While from a vendor's perspective, a Partner Portal is a great way to lower overhead and automate a process, channel company executives would rather do nothing than subordinate their business and skills to inanimate objects. This is another small nuance addressed by Channel CARMA ... and one much more visible and relevant depending upon your place within the high tech supply chain.

## Vendor corporate direction

Elements of a Channel CARMA engagement begin long before the discussion of the process. That is, the identification of the high-level market and business opportunity and the associated messages in tune with the customers' needs are developed at the corporate level. Content and design architectures are also developed and approved with and at the vendor' corporate offices.

Channel CARMA messaging addresses the end customers' needs for technology-based business solutions by finding the right balance between the messaging of the channel partner's skill/focus/expertise and the vendor technology showcase. And, this is always accomplished such that it meets the vendor's co-op/MDF and communication guidelines.

While it is true that the vendor's product is an essential element of the solution, the product is purchased not for its own sake. It is purchased because it is part of the solution to either resolve a problem or capitalize on a market opportunity.

The offer and call-to-action are also usually defined and developed at the corporate level. For instance, the offer to “Attend a webinar” or “Receive a white paper” or “Get a Cost of Ownership Analysis” . . . and the creation of the webinar content or white paper is most efficiently done at corporate. And while these same offers and activities may have been developed previously and for other campaigns, the same (or very similar) offers and fulfillment should be, and are, used across many of the vendor’s unique partner campaigns. (Unique is the appropriate adjective because while all the corporate messaging is included verbatim, each partner’s campaign is unique in that they are customized around the edges to achieve a message stating that *the Partner’s skill surrounding the technology results in the solution*. As such, a Pride of Ownership is attained by the partner personnel as well as attention to a laser-focused solution addressing the needs of the end customer.

## The channel perspective

Keep in mind that the partners have control and branding needs as well. The channel partner is customer-facing and in many cases the vendor’s voice, presence, and formal representation to the end customer’s management team. As such Channel CARMA solutions are constructed to ensure that the partners’ “branding” needs are met by positioning their skills and expertise as understanding the problem, configuring a solution, and deploying the solution within the end customer’s existing environment.

## In the field

Executing the most essential role a channel sales manager fulfills involves the joint planning and joint business development activities with/through/for their channel partner. The partner messaging and the precise audience targeting is done in a field planning session with the vendor’s channel manager and the channel company’s sales/marketing and/or executive personnel. Within each campaign element, a finite area is allocated to the partner. The content can be brief, but its impact is enormous.

Further, while the “best target audience” is understood by corporate and that direction is given to the field, it is the field that understands where the fine tuning must take place. That is, the field tunes the target audience (via list creation parameters) and solution messaging occurs to best match their “local, application, opportunity, or industry” focus and skills.

Concurrently, while the partner messaging and precise targeting is developed during a field level vendor/channel planning session; so is the assignment of expectations and accountability. When field planning sessions are executed in this manner, it is not the vendor defining where the channel company will extend its resources . . . it is the channel company doing so in the manner in which it believe it can best address the opportunity with the vendor’s technology. Putting forth a sincere and equitable effort is a manifestation of Good Karma and results in closer, more-loyal partnerships. Since the vendor is usually the one committing technical, marketing, business, financial, research, product development and other resources, their partner is expected to commit sales, technical, and marketing resources to accomplish “the mutual goal.”

As a basic tenet of Good Karma, it is fair that personnel management working for the vendor financing/subsidizing a Channel CARMA marketing campaign for their partners would expect their channel partner to commit and deliver a certain amount of resources, for example, tele-prospecting time or calls. Exactly who should make those calls and who those calls should be made to, is defined during the planning session. The subsequent results are schedule for review during the follow up sales meetings. This is just one of the specific tasks assigned to specific people that can be done during kickoff and/or review sessions. Performance-to-ex-

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pectations and/or to-date results are assessed as examples of some of the virtuously and collectively planned activities the goals of which are to result in happiness.

Just slightly beyond the era of “feeds and speeds” sales and marketing, today still far too many messages forced through the channel are product-based. It’s bad Karma because people who work at the end customer do not want to buy products. They need the utility that well-designed products and professionally deployed services provide in terms of solutions to their problems. It is worth repeating, to this day, the typical vendor/partner marketing campaign actually subordinates the solution and the partner’s skill set and ability to resolve the end customers’ business problem to “the technology.”

(Note: Vendor sales organizations should not just be measured by sales volume, a direct function of unit product sales. They also should be measured by their ability to create balance ... that is, create balance by selling and delivering solutions to end customer problems. This will result in customer satisfaction. And, highly satisfied customers tend to have a higher “Lifetime Value of the Customer” quotient.

Positioning solutions and skills over technology will also result in the end customers receiving the message that products are important but applying knowledge trumps dispensing technology.)

It’s bad Karma to construct joint programs on the misconception that technology trumps technical acumen. “People” can see through product messages as both off-the-point from a business perspective and not pertinent to their personal needs. The decision makers running mid-market and enterprise businesses are people ... and usually quite astute people. They should be addressed in clear concise terms that are important to their businesses and responsibilities.

## In conclusion ...

Channel CARMA exists to resolve the sales, business development, marketing, and financial measurement needs of the people who manage technology businesses. Channel CARMA processes will drive top line sales and allow for the measurement of the ROI on the effort to do so.

Technology vendors and channel companies must work together closely to find, understand, and resolve the business needs of their joint customers. Channel CARMA solutions are created and executed by people who know The Channel ... by experts... by people who worked for channel companies AND for technology vendors. It was created by people who have a first-hand understanding of the responsibilities of making a sales budget ... for themselves, for their team, for their company, and for and with their business partners.

Channel CARMA solutions are not theory. They utilize proven process that yields measurable results derived from motivated people working together for a common good and working in their personal best interests.

## Implementing Channel CARMA business development solutions.

There are numerous scenarios that provide an ideal structure and purpose for Channel CARMA rollouts. This section addresses some, but not all of those scenarios.

This link provides access to loose budgetary pricing for planning purposes.

<http://www.channelsmarketing.biz/portfolio/ChannelCARMA2.pdf>

## Channel CARMA Implementation Examples

### Example 1: At a Vendor's National or Regional Partner Meeting or Training Session

Give a person a fish or teach a person to fish? ... or ... use your partner event to actually begin fishing with your partner so they learn to fish quickly and correctly, catch more fish more quickly and are motivated to continue fishing and teach their colleagues after they leave the event.

It's faster, less expensive and leads to better short-term and long-term results.

In other words, it's Good Karma and an example of Empowerment.

Channel CARMA solutions can be presented as a combination Presentation/Workshop at vendor/partner events.

The presentation will be made by Tony Serino (<http://www.channelsmarketing.biz/about/serinoBio>) and Workshops breakout sessions conducted by Tony and the Senior Associated at Serino Channel Services (<http://www.channelsmarketing.biz/about/about.htm>)

When Channel CARMA is implemented at a vendor's event, the channel partners (or perhaps the entire channel ecosystem) leave the event with an active lead generation campaign ALREADY UNDERWAY. The joint lead generation activities so vital to the success of so many are not just on the planning board when they leave the event, they are in motion.

Too often vendors conduct partner events and the partner employee leaves with the very best intentions of implementing what they learned. However, they return to their office and find stacks of high priority to-dos that prevent their best intentions from occurring. Campaigns are not executed because they never reach the top of the to-do stack.

Using partner events to drive revenue and new opportunity pipelines avoids the unfulfilled best intention syndrome and replaces it with action and a motivated partnering sales force.

Vendors are expected to arrive at their partner event with the corporate messaging and template completed. By arriving at the event armed and ready, just the following matters need to be completed at the workshop between the corresponding "locally aligned" vendor field/channel people and their corresponding event attendees:

- Partner messaging
- Precise end user targeting
- Assignment of accountability for lead follow up and interim activities
- Setting of follow up Opportunity review meeting

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## Example 2. As a Revenue Generating Pilot Program and Case Study

Vendors select a set number of partners (works best for ranges of 10 to 50 partners) and conducts a Pilot campaign with these partner using Channel CARMA processes. The Pilot will not only generate revenue and new opportunities pipelines, it will also be used to create a Case Study suitable to be presented at future Partner events (such as National/Regional Partner meetings or industry events).

Partners can be selected depending upon a number of criteria including available co-op/MDF, Technical Skills, Geographic focus, or other objective or subjective reasons.

Somewhat similar to the previous examples, this method also avoids the unfulfilled best intentions and replaces it with measurable actions from 10 to 50 motivated partnering sales forces.

## Example 3: In the field, as a Live Sales and Marketing Planning Session AND Implementation Process

Think about how often a vendor's field channel managers meet (in person or in conference) with the executive, sales, and marketing managers of their partners' businesses. Now, think about removing all the superfluous aspects of those conversations and focusing the discussion on only the following:

- Which accounts are the best targets of opportunity for vendor and channel company?
- Who are the most appropriate people to reach at those accounts?
- What is the partners' most complementary skill set relative to the vendor's technology in the local market or vertical specialization?

Using a Channel CARMA framework makes this possible. Since all the "other" matters are addressed by "corporate" and within the Channel CARMA program design, the field can focus exclusively on fine tuning the target audience and fine tuning the partner's message and following up leads.

Metaphorically, it is similar to the soldiers or scouts at the front line of a battle directing firepower at the key points of concentration. Those field people direct the teams delivering the fire where to aim and with how much force. The field does not have to design the heavy weapon, load it, care for it, move it, address all its ancillary needs, etc.

After the field people agree on the finely tuned targets and finely tuned messaging, they provide that info to the program manager ... and then have nothing left to do except follow-up the leads and review the implementation to see if they need to further fine tune the campaign. The program manager implements by:

- Getting the list(s) of the precise targets, including email addresses
- Incorporating the partner messaging into the delivery "template"
- Authorizing the messages to be sent via email or "best method" as defined
- Reviewing the reports
- Defining the next action

The field can concentrate their efforts on selling ... and not on marketing or superfluous matters.

#### Example 4: Enhancing positive relationships and accelerating the existing forward-moving inertia

Channel CARMA solutions can also be deployed when and where a good vendor/partner relationship already results in superior performance. Many times the best strategy is to strengthen what you do best.

Almost exactly the same as in the preceding example of a Live Sales and Marketing Planning Session AND Implementation Process, this process is used to identify and reach the “next best incremental opportunity.”

The field people basically direct the fire-power needed at the most suitable target audience. For example:

- The names and contact detail of additional people within current customers are acquired ... and these people are contacted using the Channel CARMA process, inquiring about their business needs
- Finding contacts at different companies who are known to have similar business issues as typical clients. Perhaps companies in a new geography or a different industry within the same geography
- Perhaps the channel organization has opened a new sales location and the management team needs to help that sales team building new opportunity pipelines quickly
- Perhaps the sales manager or channel organization needs to provide extra support to help underperforming sales associates
- Totally new people and industries that recently became good suspects due to new technologies or technical skills such as a new certifications received ... or special circumstances such as government subsidies or regulatory compliance matters
- Totally new lines of business or skills

Example 5: In whatever form makes sense to address your business development and lead generation needs within your channel ecosystem.

Channel CARMA is a flexible process and framework. It can be easily altered to match the environment and structure that you use or plan to use.

#### Example 6: For and By a Channel Company

Because Channel CARMA is a flexible process and framework, it is used by Channel Companies to drive revenues and pipelines with and for their vendors that require reporting as part of their MDF guidelines.

An investment in a Channel CARMA solution by a VAR, integrator, Solution Provider, or MSP provides a number of valuable results, including:

- Hot leads
- Warm leads
- Intellectual assets owned by the channel company in the form of a database of key people, including their email addresses
- Social Media connector, and
- A visible and tangible example from the channel company to their vendor partner, showing how much effort they are extending to feature the products and technology from their vendor partner.

A channel company that represents multiple vendors can use the frame work with many or all of their vendor partners. In effect, they do not change their company branding, focus or skill, but rather substitute the vendor technology message to match and become the core of the solution and skills of their practice.

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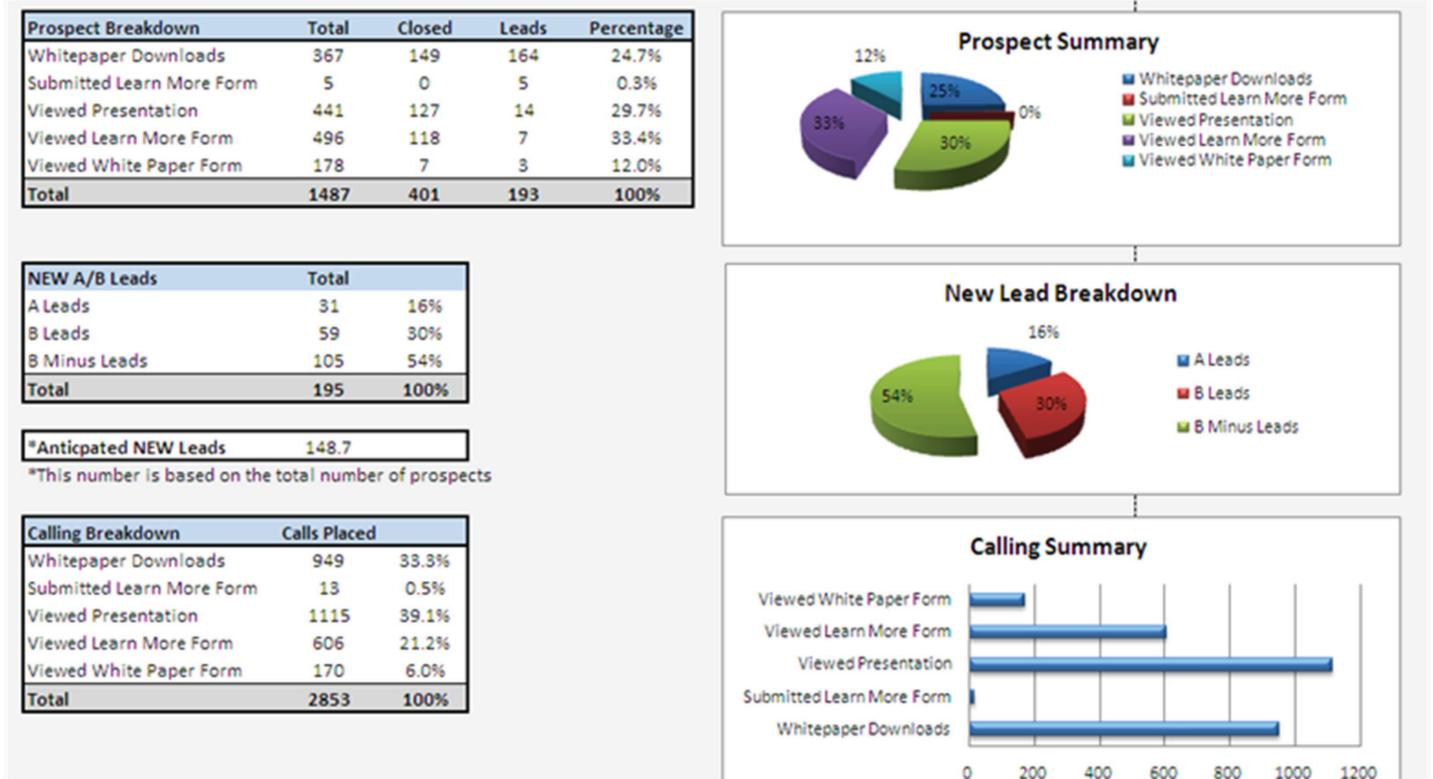
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## Sample report and example of ROI calculation

The image below is from a typical Channel CARMA report. Reports are available at up to six milestones within a typical Channel CARMA campaign.

Examples of how to calculate ROI appear below the report. Please note: report detail is provided in an open standard format such as a .csv file to accommodate input to any CRM/PRM application being used by vendor or channel company.



Pipeline ROI calculation:

31 "A" leads X 33% close rate X \$100,000 ASP = \*\$1,000,000 "A-level" pipeline

59 "B" leads X 20% close rate X \$100,000 ASP = \*\$1,200,000 "B-level" pipeline

Campaign generated \$8,000,000 of total opportunities resulting in \$2,200,000 of new business.

Cost of campaign = \$100,000 ... generated \$2,200,000 22:1 ratio

Question: What happened to the \$5,800,000? Was it lost? Was it never placed? Was it placed with a competitor? Was the another outcome?

\*Actual sales revenue figures are attained from Sales Out reports. The customer names appearing on the sales out report and then compared to the names on the target lists used during the campaign. The total revenue generated from the accounts that appeared on the target list is added and the sum divided by the cost of the campaign.

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Wakefield, MA 01880

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Channel CARMA is a pending service mark of Serino & Associates LLC

## About Serino Channel Services

The company helps its technology vendor and technology channel clients drive sales and partnering relationships by building new business pipelines of hot, warm, and cool prospects with measurable processes. The company originally opened on July 16, 1993 as Serino Associates, Incorporated to serve the business development needs of IT Vendors and channel companies. In April of 2009 it was reorganized and rechristened Serino Channel Services to more accurately reflect our singular area of concentration. More than 130 unique technology vendors and channel companies have engaged our services.

The executive staff and Senior Associates at Serino Channel Services possess a deep first-hand understanding of what it takes to be successful in the channel. It comes from thousands of face-to-face sales calls, hundreds of joint vendor/channel strategy and execution sessions, and extensive communication with the IT decision makers and business executives who purchase technology solutions needed to resolve their business problems or capitalize on their business opportunities.

For the same reasons that it makes sense for IT Departments to outsource some of their IT needs to MSPs (expertise and resources in applicable disciplines or areas of need), it makes sense for channel companies and IT vendors needing to increase channel sales to outsource some or all of their marketing and business development activities to channel sales and marketing experts.

Based on our deep first-hand experience, Serino Channel Services plan channel development strategies and execute the associated tactics of joint campaigns ... efficiently and with a high degree of measurability.

The future success of each technology vendor and/or channel business is predictable; simply look at the new business pipeline. To become or remain successful the pipeline must be consistently filled, nurtured, and about 3 to 5 times the size of their sales budget. Serino Channel Services helps our clients build that pipeline by finding net new opportunities, technology refresh and upgrades, or by reengagements with dormant accounts.

Serino Channel Services is media agnostic. Our goal is not to sell an ad, an event, and email campaign, an application, or a plan. We provide the business development and other marketing services that each manager needs for their unique situation and relationships. Serino Channel Services will:

- Serve as your outsourced marketing department or program manager
- Create your marketing plan and/or execute its tactics
- Act as your marketing consultant
- Conduct a campaign or project
- Manage your MDF, perhaps expand its size, and definitely expand its impact

Don't just spend or relinquish your MDF, co-op, or marketing budget. Deliver a measurable ROI with:

- Plans that define your direction and provide the blueprints for your extended sales teams to follow
- Lead generation campaigns to stock and replenish your pipeline
- Compelling offers that excite prospects to act in their own and their company's best interests
- Sales tools that help your sales reps and their prospects move quickly through the sales cycle
- Branding/co-branding activities that enhance your company, its position, and partnering relationships

Learn more about Serino Channel Services and Channel CARMA solutions by accessing information and examples from the links below.

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