zinfi™ | sugarcrm

Lead Management Using ZINFI UCM and SugarCRM

Table of Contents

A Letter from the CEO

The Leader in Unified Channel Management

Dear Channel Professional:

Thank you for picking up this booklet on integration best practices for lead management between ZINFI Technologies, Inc. and SugarCRM. We at ZINFI have been privileged to work for major Fortune 1000 companies worldwide to drive such integration programs to facilitate organizations to run channel programs globally.

There is no doubt that integrated channel management is complex. However, it's made more complex when it is managed through a set of tools and systems that are disjointed. In many organizations, channel management systems actually consist of an array of diverse systems that have evolved over a long period of time. As a result, most companies today trying to implement a unified approach to their channel management struggle to make it work and get a decent ROI. In order to build a high-performing channel, it is essential to optimize channel management end-to-end. ZINFI's vision is to enable our customers to optimize their channel end-to-end via our Unified Channel Management (UCM) platform.

ZINFI's highly advanced partner relationship management (PRM) platform is powered by a set of do-it-yourself (DIY) tools for small to large enterprises to automate and manage their channels effectively. ZINFI's platform allows enterprise customers to reduce their operating costs and accelerate revenue growth through a highly automated end-to-end channel management framework. As a part of this framework, ZINFI's platform will now connect to Sugar's platform seamlessly.

Development, roll-out and optimization of these integration processes results in world-class Unified Channel Management. When achieved, organizations not only generate more revenue at a lower cost, but also build a sustainable global advantage.
This booklet focuses primarily on various aspects of Sugar Sell, Sugar Enterprise, Sugar Professional and ZINFI UCM's PRM, with emphasis on lead management and incentives management. We encourage you go through the various best practices articles, and we hope you will walk away with pragmatic ideas that you can start implementing today to make a sustainable difference in your organization.

Recognizing the value of a true Unified Channel Management framework always starts with a solid foundation of PRM capabilities of your channel programs. As always, if you need help, have any questions or need more information don't hesitate to contact us anytime.

Cheers!

Sugata Sanyal

Sugata Sanyal
CEO and founder

How This Book Is Organized

This booklet begins with a series of four articles that cover the fundamentals of lead management software, the five basic stages of lead management, the critical role that lead management plays in channel management and a discussion of how lead management can work in your channel sales environment.

The booklet then shifts to a more technical discussion of lead management automation using ZINFI's Unified Channel Management (UCM) platform. This section explains the specifics of managing partner accounts, "shark tank" lead distribution strategies, opportunities and deals—and illustrates these concepts with three use case scenarios. This section also presents detailed instructions for connecting to SugarCRM through ZINFI's Centralized Interconnect (CENTRi™) integration engine, describing the authentication process, summarizing various integration processes, and providing examples with integration use cases.

Finally, the booklet also provides detailed instructions for connecting to Sugar Sell through ZINFI's Centralized Interconnect (CENTRi™) integration engine, describing the authentication process in detail, summarizing various integration processes, and providing examples with integration use cases.

The lessons and best practices in this booklet are based on years of intensive efforts creating and deploying sophisticated channel marketing automation systems as well as ongoing discussions with our customers as we strive to understand their evolving challenges and requirements. Whether you read each section and chapter in sequence or skip around as your particular interests, we think there is a wealth of information here that even the most experienced channel marketer can learn from.

Enjoy!

1 Strategies for Lead Management

Channel sales are dependent on partners' ability to generate, manage and close sales leads. Sometimes partners are able to generate new opportunities for a vendor, but in most cases vendors feed leads to their partners. Managing this process requires a diligent approach—otherwise, most leads go astray relatively quickly. In this article we will explore how to build a highly effective lead management system and process in a business-to-business environment. We will explore how to generate leads in the consumer segment at another time.

Building an effective lead management program should begin with three basic ideas: First, we need to acknowledge that all leads are not created equal; any lead management approach needs to take this principle into account. Second, leads vary greatly by vertical and by segment size (i.e., SMB, mid-market and enterprise). Third, leads tend to vary significantly depending on the products, solutions or services you are selling and who you are selling to. If you have a business that is narrow and focused and sell a product or solution to one or two segments, your job is significantly easier than if your business is very broad and sells globally with a whole bunch of solutions. Before you begin to build an effective lead management system, you should simplify, focusing on the most horizontal product and solution that covers most of your customers. Why? Because it's much more practical to start in one market with one solution, and then scale locally and globally.

The topic of lead management is as vast as an ocean, so it's not possible to address all aspects of it in one article, but I want to focus on one critical dimension which is based on the old cliché that goes, "Leads are like fish out of water—they only survive only so long." When you think of lead management, always think of shelf life. While the shelf life will vary a lot depending on whether the lead is a marketing or sales qualified lead, or whether you are selling an SMB transactional product vs. a complex enterprise solution, in principle all leads have a finite shelf life. So, let's start with that first.

Managing marketing qualified leads:

- Marketing qualified leads are basically earlier versions of a sales qualified leads, which are driven by the budget, authority, needs and timing (BANT) parameters of a potential prospect from your target market. The prospect generally meets these criteria for your types of solutions, has a defined purchase horizon or time frame, and has at least some level of ability to influence a future transaction.

- How you manage marketing leads and how you distribute them to your direct sales team or indirect sales team is a function of your go-to-market structure. Some organizations with more complex solutions for enterprises have specific lead development reps (LDRs) who follow up with marketing leads and nurture them over a period of time. Other organizations take a more digital approach to nurturing, often because average selling prices (ASPs) are lower.

- How you address marketing lead management is a direct function of what you are marketing. Marketing lead shelf-life tends to vary by months, and in some cases years—depending again on the complexity of the solution and how involved the buying process is.

Managing sales qualified leads:

- Because sales qualified leads are driven strictly by a prospect's need, ability and timing to purchase a product, the shelf life of these leads can be significantly shorter. Therefore, these leads require a highly focused, fast-track approach, although the precise approach depends on what you are selling:

    ◊ If you are selling a transactional product (software, hardware or services) you will have to be able to let the buyer try out the product in some way, or at the very least understand clearly what they will buy without a trial. Most buyers back off if it is not clear to them what they are going to get, so lead management in this context tends to focus on deep engagement on the part of the buyer rather than just high-level category awareness.

    ◊ If, on the other hand, you are selling a more complex solution to an enterprise target, the lead management process may involve targeting multiple individuals. This scenario lends itself to account-based selling, where your sales team strategically targets various parts of an organization. From an organizational perspective, sales development reps or business development reps play a critical role in this area.

So, at a high level, when considering lead management as a category, it should now be obvious that strategy, structure, systems and staffing will all play a critical role in determining the best way to approach B2B lead management. We haven't discussed various other important aspects of lead management here, but please visit our blog to read other lead management topics related to staffing and systems. You can also download our "Lead Management Best Practices" guidebook for a comprehensive view of B2B lead management.

❷ Organization for Lead Management

In my previous article on lead management, I discussed how to develop the right lead generation and management strategy by tying it to market segments, product types, pricing, complexity and other factors. In this article, we will explore the best way to build an organization that can implement your lead management strategy for your business, as well as for your channel partners.

As I noted, the topic of lead management is vast. In order to provide examples of an exemplary organizational structure for lead management, I am going to make assumptions around three types of products and services. While these three solution types by no means represent that vast array of products and services are out there, they should give you a good idea of what is required from an organizational perspective

1. **Transactional product** – Let's assume you are selling a transactional product that costs less than $10,000, but does require some installation support from your partner or reseller. This price point may not be exceptionally high, but it is substantially more than the few hundred dollars you might spend on a product you can buy directly (without the support) from an online store. I pick this price point because it is relatively low in the context of B2B sales, and yet an inside sales organization can be supported selling at this price. On the other hand, a price point lower than this would require a mass marketing approach that includes building out a high-volume sales infrastructure. For the sake of our discussion, let's assume your gross margin on this price point is relatively high (north of 65%).

With a product of this nature, it is difficult to have any high-touch lead generation mechanics. Your marketing approach needs to have a highly automated way of generating interest, and yet it must qualify leads through a structured nurturing process. While you may have a few inside sales rep who run through the nurture data and distribute those leads to your partner base, it is the partner who will actually need to set up a structured qualification process. This is why, before you spread the leads across multiple partners, it is essential to have clear agreements with a few partners who will have the dedicated sales resources to qualify these leads and follow up for closure.

> *The partner, on the other hand, has the potential of a lifetime revenue opportunity from the end-customer – not just from sale of your product, but also from providing installation, maintenance and upgrade cycles. This allows the partner to focus its resources on driving qualification and closure.*

Why am I suggesting this? Because you don't have enough margin per transaction to provide both marketing and sales qualification resources, plus provide a commission to the partner for the transaction. The partner, on the other hand, has the potential of a lifetime revenue opportunity from the end-customer – not just from sale of your product, but also from providing installation, maintenance and upgrade cycles. This allows the partner to focus its resources on driving qualification and closure.

2. **Solutions product** – Let's assume you are selling a product with an average selling price of $50,000 or more. Reflected in this higher cost is the fact that the product requires quite a bit of planning, designing and installation support. You are also able to sell add-ons, and thereby increase the customer lifecycle revenue to 3 times to 5 times the original sale price. Because your gross margin on this product is 75% or more, there should be sufficient profits for you to invest in an inside sales organization that can qualify leads.

From a partner perspective, since higher-priced products generally have a longer sales cycle from lead generation to close, it is reasonable to expect that the vendor has invested enough to qualify a deal. Partner sales resource

costs will be significantly higher in this example than in the transactional product example I discussed earlier. If you are the vendor, investing in a central lead qualification team will help you attain the necessary scale to succeed – a lead qualification level that most partners cannot attain. However, once a qualified lead has been handed over to the partner, the partner is trained and competent enough to go close such opportunities.

In a scenario like this, it is not unlikely that the partner also will invest in marketing and lead generation, since lifecycle revenue from the end-customer will include multiple components –including original product sale, design, implementation, and maintenance and upgrade revenue, which may be 5 times to 10 times the product price.

3. **Services product** – In this case, we will assume that you are selling some sort of a financial product that has an annual revenue stream – because once the customer purchases it, they will very likely continue to purchase. The lifetime value of such a product could be a multi-million dollar revenue stream for you, as well as for the partner. With a product like this, it is very likely that you not only have a lead qualification team, but also have a direct sales team that actually co-sells with your partner.

   In this scenario, your partner may be a very large organization which has its own lead qualification and sales teams that operate in parallel with yours. In order to support multiple partners of this size, the organizational structure on the vendor side may be quite complex and relatively large. The sales team may also need financial risk planning and legal team members, which typically would not be part of the first two types of products that I have discussed earlier.

I could keep going on here and come up with more product types with variations on pricing, complexity, sales cycle and more, but I think I have made my point: The core purpose of these three examples is to illustrate the importance of thinking through the relationship between your lead management organization and the specific products and services you are selling through the channel. Depending on the breadth and depth of your products and services portfolios, you may actually need multiple organizational structures within your lead management team. We see that every day in large businesses that sell everything from toothbrushes to rocket engines. This is why lead management is such a broad subject and requires significant thinking and planning to provide the right return on your organizational investment.

3 Five Stages of Lead Management

Lead management is one of the top marketing keywords that is searched on Google every day, which is a clear indication of the huge and growing amount of interest in the topic. Are we clear on what lead management means? Basically, lead management is an organized way of generating, distributing and managing contacts with potential prospects, and engaging with those prospects to identify or generate an opportunity for a sales team to pursue. Lead management is one of the most important business functions, bridging both marketing and sales through a combination of people, process and automation.

Just like a fish out of water, a lead has a specific and limited lifetime. Once a lead has appeared, it needs to be nurtured, managed and closed systematically. A typical lead management system will allow an organization to manage five critical phases of the lead life cycle, as follows:

1. **Lead Generation** – Content marketing has displaced the old model of telemarketing to generate leads. Today's marketers know that buyers search online and, by the time they contact a vendor, they have a very clear idea about what they are looking for. This is the precise point where the first step along the path of systematic lead management, using an integrated approach to lead generation, must be taken. Integrated tactics like social marketing, search marketing, email marketing, direct mail marketing, and online banner ads, are all critical methods of generating awareness and create a solid foundation for inbound marketing. If you combine inbound marketing with outbound telemarketing towards your installed base of existing customers and interested prospects, you can exponentially increase the effectiveness of your lead generation efforts.

2. **Lead Distribution** – With leads in the pipeline and interest from prospective buyers, the next key step in lead management is lead distribution. I can't emphasize how essential it is to have an automated mechanism for lead scoring and distribution. Not all leads are ready for

A prospective buyer's online persona should be scored in a systematic way, and appropriate sales people (whether internal captive or external partner-based sales reps) should be alerted when a lead is ready for contact. This systematic approach towards lead nurturing is critical to drive sales efficiency, increase closure rate and build the reputation of an organization as a responsive provider in their marketplace.

sales contact, so either they need to be nurtured further (please see Point 3, below) before being handed to an inside or outside sales rep or, in the case of channel-based organization, must be distributed to the right channel partner. This is where a rule-based lead distribution engine comes in. Any state-of-the-art channel marketing automation platform should be able to distribute a set of leads to a group of partners based on various criteria, such as partner type, partner location, partner competencies, or interested buyers' segment, e.g., SMB, mid market, enterprise, vertical or geography.

3. **Lead Nurturing** – Another critical component of lead management is lead nurturing and scoring. A marketing automation platform should be able to automatically create a multi-touch engagement with a potential buyer based on their purchase behavior. A prospective buyer's online persona should be scored in a systematic way, and appropriate sales people (whether internal captive or external partner-based sales reps) should be alerted when a lead is ready for contact. This systematic approach towards lead nurturing is critical to drive sales efficiency, increase closure rate and build the reputation of an organization as a responsive provider in their marketplace.

4. **Lead to Opportunity Creation**– Once a marketing-qualified lead has been converted to a sales-qualified lead, the next big step is to develop the opportunity. This is the moment for exact deployment and fit analysis. This is a critical sales step, and also an essential part of the lead management process. Most existing CRM systems provide an effective way of tracking and managing opportunities, but they aren't designed with the channel in mind. If you are selling through the channel, make sure that you use a Partner Relationship Management platform that can drive opportunity creation and management through the channel in a dynamic and distributed fashion.

5. **Lead Management Analytics** – Last but not least: the most important step in lead management is to integrate the marketing and sales processes seamlessly, via a dynamic analytical engine that allows you to see clearly how effective your marketing is, how well your messages are aligned across multiple market segments to drive better engagement and conversion, and the steps you need to take to improve the efficacy of your sales programs and campaigns.

At first glance this list may seem like too much to handle for an organization that hasn't yet implemented automated lead management processes. However, it is not that difficult if you deploy lead management systems in simple automated processes, step by step. The key is to select a marketing automation platform (for a direct sales organization) or a channel marketing automation platform (for an indirect sales organization) that allows you to roll the system out over a few quarters. Rome wasn't built in a day, and this definitely applies to your state-of-the-art lead management system. But by taking the first step towards automated lead management, and identifying a reliable automation vendor to partner with, you can not only increase your sales, but also substantially reduce your marketing and sales costs.

I would love to hear from you where you think your organization is and what challenges you have faced to either deploys or to plan a deployment of a state-of-the-art lead management process. Thank you for continuing the conversation!

4 Why a Lead Management System is Critical for Channel Sales

Most vendors spend millions of dollars in generating end user awareness and inbound leads. However, very few have systems in place for getting those leads effectively to channel partners. Instead, many of those leads tend to be pursued by inside sales teams, but lack of an integrated channel lead management system substantially reduces marketing ROI.

At ZINFI, we regularly conduct channel partner satisfaction surveys and ask partners how vendors can help them grow their businesses. The number one item on the list is distribution of good leads to partner sales reps. What we've found is that, even where leads are forwarded to top tier partners, very rarely do they have a structured system in place where leads are distributed, nurtured, qualified, tracked and closed. However, a good Channel Marketing Automation platform can significantly increase sales closures through a proper lead management system.

Before we delve into this topic, let's make sure we are clear what we mean by a lead management system. It is an automated, programmatic way of generating, allocating and tracking the performance of end user leads that have been provided to channel partners. Without an end-to-end automated platform, all this would be really hard to achieve. A state-of-the-art lead management system should have a few core components:

1. **Prospect Records Management** – Since most lead management systems need to connect to a Customer Relationship Management (CRM) platform, it is essential that the prospect records management system is built upon a CRM-like structure. This greatly enhances data flow between the lead management system as well as other CRM platforms on the vendor or partner side.

2. **Records Life Cycle Management** – Once leads have been distributed to partner's sales team, it should be possible to move the record through various sales cycles and track progress from stage to stage. Vendors should be able to log

into the platform to check the progress of each record and the overall status of the pipeline. The partner should be able to record events like converting a prospect to a contact and adding opportunities to create a pipeline forecast.

3. **Lead Distribution and Withdrawal** – This is a critical feature for vendors, first of all to make sure a set of leads can be given to a set of partners, but also, if partners are not following up after a certain time, to be able to withdraw the leads back into the Prospect Records Management system for redistribution to other partners.

4. **Lead Distribution Rule Set** – A vendor should be able to push leads manually or automatically to a set of partners based on the lead type (SMB, Mid-Market, Enterprise, or other categorization) and also to match partner competencies, locations, and so on. This ability to create rule sets adds an important layer of automation to lead distribution, which gets the leads to partner team as soon as they are generated.

5. **Account Protection** – Certain end user accounts are managed by large or premier partners and a vendor may want to protect these accounts. The lead management system has to be able to protect one or multiple accounts and automatically push leads from those accounts to specific partners and sales people. On the other hand, if a vendor wants to have partners compete for certain accounts, they should be able to keep these leads as open records.

6. **Rewards Integration** – By integrating proper rewards and incentives, a vendor can greatly drive partner engagement and status reporting. We all know sales reps are busy and they have their own preferred CRM systems. However, a proper incentive structure around reporting can substantially enhance a vendor's ability to track lead status, by using sales rewards to motivate individuals to enter lead status details into the platform – either manually or by automatic synchronization by connecting their Sugar Sell accounts to the lead management system.

7. **Dynamic Reporting** – A state of the art lead management system should be able to provide dynamic reporting to both partners and vendors, so that lead and pipeline status can be tracked at multiple levels. Since selling is a competitive sport, the ability to share stack ranking among individual partner reps also drives better participation and adoption of channel programs.

While such a long list of requirements may be daunting to anyone considering a lead management system, a robust Channel Marketing Automation platform such as ZINFI's Partner Relationship Management (PRM) platform can not only facilitate lead distribution, but also substantially increase ROI.

5 Making Lead Management Work for Your Channel Sales

Lead management appears to be extremely complicated for organizations selling through the channel. However, it doesn't have to be that way. While it does require some planning, developing and deployment—along with a lot of persistence—most organizations can do it right with a bit of guidance and careful planning. Yes, it can get complex if you are a very large enterprise account, and have competing sales motions—direct (internal) sales and indirect (channel) sales—but even in that case things can be done properly with a certain level of dedication and focus.

Let's take a moment and explore from a partner perspective why most lead management efforts tend to fail. In most cases a vendor organizes lead management around their own needs instead of the needs of its partner base. Vendors typically focus on maximizing their own returns instead of focusing on partner returns. This is in direct conflict with the core tenet of channel management. If a vendor does not focus on partner profitability as a primary driver or motive for the partner to engage with a vendor, then the foundation of the partnership is on the shaky ground from the very beginning. Lead management that is not designed to protect the partner's interest is highly unlikely to succeed. This is why it is very important to think through the purpose of lead management as you develop a strategy for applying it.

Channel sales is about sales. We can never forget that. The purpose of lead generation, whether it is vendor-led or partner-led, always needs to begin with the end in mind: the closing of a transaction. In this context, designing a system with the partner's perspective in mind is very important. There are a few unique strategies or concepts like "shark tank" and "round robin" and so on that are interesting and do work occasionally. But most partners hate the idea that if they are late on a deal for some reason or other they may lose it to another partner. Fear is not generally an effective motivator, especially when you have multiple ways to escape. Therefore, if you are considering lead management for your channel, start with a specific commitment or named account as a focused way to start.

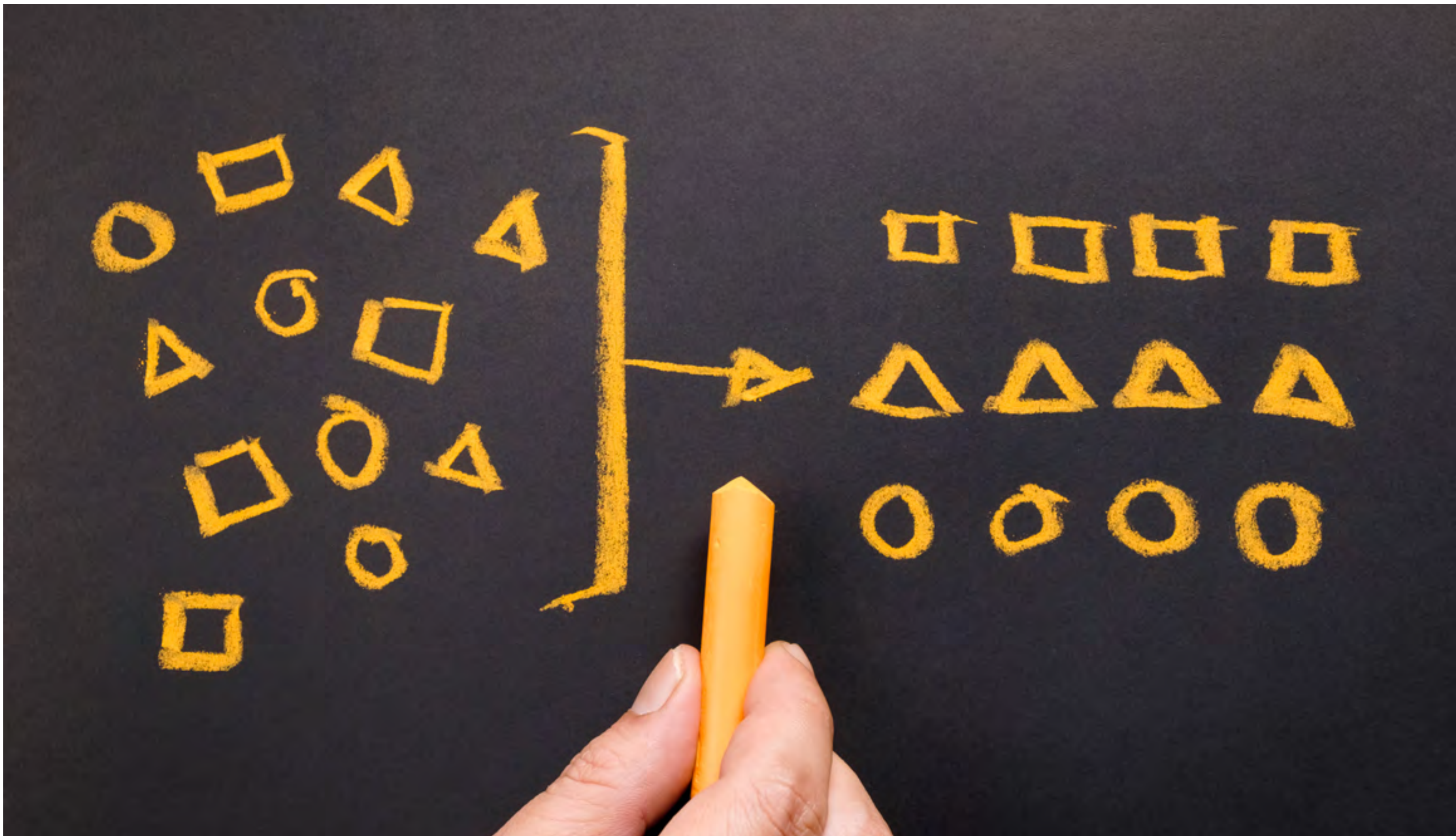
It is better to have a few partners in your lead management programs that work instead of having the majority of your channel be part of those programs just for the sake of inclusion. In the latter cases, partners end up being insecure about what might happen to those leads and whether they will eventually be able to complete the sale. While certainly you want to provide options to your end customers and therefore competition among your partners, that only works with a highly mature channel where you have enough leads to share. If you're just feeding little fish to big ones, that approach will almost never work.

The foundation of your lead management efforts always depends on your overall channel management philosophy. Do you drive your sales through a broad, overly distributed channel, or do you drive your sales via a focused narrow channel with a limited set of partners? Lead management can provide an answer or an approach to dealing with this fundamental question.

Lead management tends to work best with a narrow channel where a few partners have dedicated sales territory and have a focused approach to who they serve, and where the vendor works with them to grow those accounts or segments. If, on the other hand, a vendor is perceived as a "big brother" and over-distributes via a broader channel, then partners will almost always be afraid of losing money on their marketing and sales investments. It is very important to have clarify your thinking about this before you begin to drive a specific lead management agenda.

Yes, there are cases, as I noted earlier, where a "shark tank" or open account approach can work, but even in that case you need to limit how many partners pursue a specific lead and determine what criteria you are going to use to select those partners. If you open up a potential prospect to too many partners you risk irking the end users with a plethora of hungry sales rep reaching out. A balanced approach of three to four partners selected based on their reach, expertise and ability to support the end-user needs probably makes the most sense.

Thoughtful planning of your channel strategy is critical in laying the foundation for your lead management framework. When you align your channel strategy with your lead management tactics, the chances that lead management will work for your channel go up exponentially. We see this every day among our clients who have done a good job in thinking this through, as opposed to those who are just trying to deploy lead management for the sake of doing what they think they are supposed to do. I sincerely hope your organization belongs to the former group.



6 What is Lead Management Software?

What is lead management software? A simple definition would go something like this: business process automation software that streamlines activities between marketing and sales to identify potential new business opportunities and enable the closing of sales.

Now, to explain what lead management is functionally, we have to spend a few more minutes analyzing the process of lead generation and closure of a business transaction. Typically, lead management software automates every step from start to finish, encompassing lead generation, management and closure. In this article, we will explore these few critical stages.

The key components of lead management software are: 1) integrated lead generation capabilities, including integrated marketing tools, 2) a repository like a Sugar Sell to manage and process all the leads, and 3) the ability to distribute those leads to various groups of partners for processing.

Each of these three phases requires an integrated set of capabilities to be in place in order for lead management to succeed. In other words, good lead management software doesn’t focus exclusively on lead routing and distribution capabilities, but it also enables users to generate leads with an integrated approach and distribute them to a diverse partner base efficiently.

> *Lead management software automates every step from start to finish, encompassing lead generation, management and closure. In this article, we will explore these few critical stages.*

Now, some of you may be thinking that, well, demand generation is beyond the scope of marketing automation software. That may be generally true, but advanced lead management software like that offered by ZINFI already comes with integrated demand generation capabilities. This out-of-the-box integrated capability significantly increases ease of use, reduces deployment and configuration time, and reduces operating costs.

The same applies to lead distribution and management. When you are trying to accommodate a variety of users within lead management software, the core capability must be linked to the creation of rules, groups, and dynamic management policies. Some of the policies may vary by region, territory, product types, etc., and the lead management software should be able to handle various go-to-market models without requiring the organization to spend boat loads of money in building customized customer configuration.

Finally, tracking and reporting of leads across the lead management lifecycle is incredibly important to drive return on investment (ROI). Your lead management software must have a powerful, dynamic analytical engine to provide detailed, step-by-step visibility into what is working and what is not.

When properly configured, state-of-the-art lead management software can provide deep insight into a variety of lead generation and management activities. It can also identify process gaps, areas ripe for improvement and potential user training requirements to maximize ROI from any marketing and sales investment.

7 How to Automate Lead Management

ZINFI's UCM platform comes with an integrated Lead Management module for your channel marketing partners and sales personnel to allow tracking of marketing activities and results from multiple campaigns and communication channels such as email, search, social media, telephone, print, etc. ZINFI's integrated Lead Management module not only does all of these but also provide a seamless integration to Sugar.

With the Partner Lead Management module of ZINFI's partner relationship management (PRM) platform, your organization on its own Sugar Sell instance can efficiently distribute leads to its partner base and manage the complete "contacts to contracts" process at UCM. This module helps you to engage partner sales reps using "round robin," "shark tank" and other lead management mechanisms and manage the complete lead management cycle through both platforms. Structured on the integrated lead management dynamics and drawn upon the integrated channel expertise; loyalty programs can be architected through our Sales Rewards module to reward and acknowledge your partner base. The Rewards module provides the organization with a variety of tools to automate the management of incentives programs that will drive improved channel performance and allows the set-up of channel sales programs for internal/external users & progress tracking in a unified interface through our centralized reporting engine.

You can seamlessly sync from your existing Sugar Sell instance allowing integration of your Partner System of Records (PSOR) between the systems and yours and significantly increase decision-making power by keeping all reports, metrics, and ROI data at your fingertip for critical reviews and investment analysis through Centralized Reporting. Powered with standard compliant procedures like GDPR, CAN-SPAM, etc., ZINFI's Lead Management automation module enables you, your partners and end-users with complete secure, private, and confidential access to their entire list and you in total control of the complete automation process. Single Sign-On (SSO) Integration can be briskly setup for primary identity management using either Sugar or ZINFI.

- **Partner Account Management**

  The Partner Lead Management module makes it easy for your organization and your channel partners to manage the journey of prospective leads end to end through a fully automated system. Customers will be able to take their Sugar resident PSORs (Partner System of Records) and seamlessly synchronize them with ZINFI's Partner Profile module. The automated sales approach encourages partner engagement and yields enhanced productivity.

  Our Partner Lead Management module also offers functionality to track leads based on their age. This helps users sort out leads so they can effectively prioritize their follow-up activities. You can quickly set systems alerts to send automated notifications to users informing them of dates and times they are scheduled to complete specified tasks.

- **Shark Tank Management**

  ZINFI's Partner Lead Management module allows your organization to distribute leads to different partners or partner groups based on various criteria specified in "shark tank," lead distribution strategies. You can easily connect this module to your Sugar Sell for effortless transition of data between the two platforms, letting you distribute leads from your Sugar Sell instance, and your partners to receive them at UCM and bag deals for you; while you manage and control the extensive process from your Sugar Sell instance.

  The shark tank features of our Partner Lead Management module allow your organization to define a time frame for lead follow-up with pre-scheduled system notifications at regular intervals in cases where no activity has been performed. Our built-in pullback functionality allows a lead to be pulled from one partner in case of non-activity and reassigned to another.

- **Opportunity & Deal Management**

  The Partner Lead Management module allows your organization to set up an automated review and approval mechanism for all submitted opportunities and deals by the channel sales team. You can also push submitted opportunities and deals directly to your Sugar Sell instance through configured system connectors at UCM,

  The dynamic reporting engine of ZINFI's Partner Lead Management module gives your organization clear visibility into the sales funnel created by the channel sales team. Individual channel partners can also track their sales activity progress by reviewing their own progress dashboard. The integration and data synchronization allow customers to have their users reside on SugarCRM for reporting while channel partners can access dynamic reports on ZINFI's platform or vice versa.

- **Use Cases Summary**

  Lead management typically happens from one of two sources. The first being that the Admin creates or uploads a prospect(s) in the Partner Portal, and then passes them to a Partner or Partners via various methods, such as

  - *Account based (direct assignment)*
  - *Round Robin (a rotating distribution)*
  - *Shark Tank (leads are passed to groups of partners who accept them on a first come, first serve basis).*

  The second is that the Admin has a Sugar Sell instance wherein the lead(s) exists, and they pass their lead(s) from their Sugar Sell instance to the Channel Partner Administrator (CPA) of a particular partner organization. The CPA then passes the lead(s) to any of their reps (the Contacts at this Account) as they choose to assign. The leads are worked by the Partner, converted into Contacts and have Opportunities generated - typically synced back to the Sugar Sell instance by a sync process wherein the Admin can process or track these "converted leads" and opportunities.

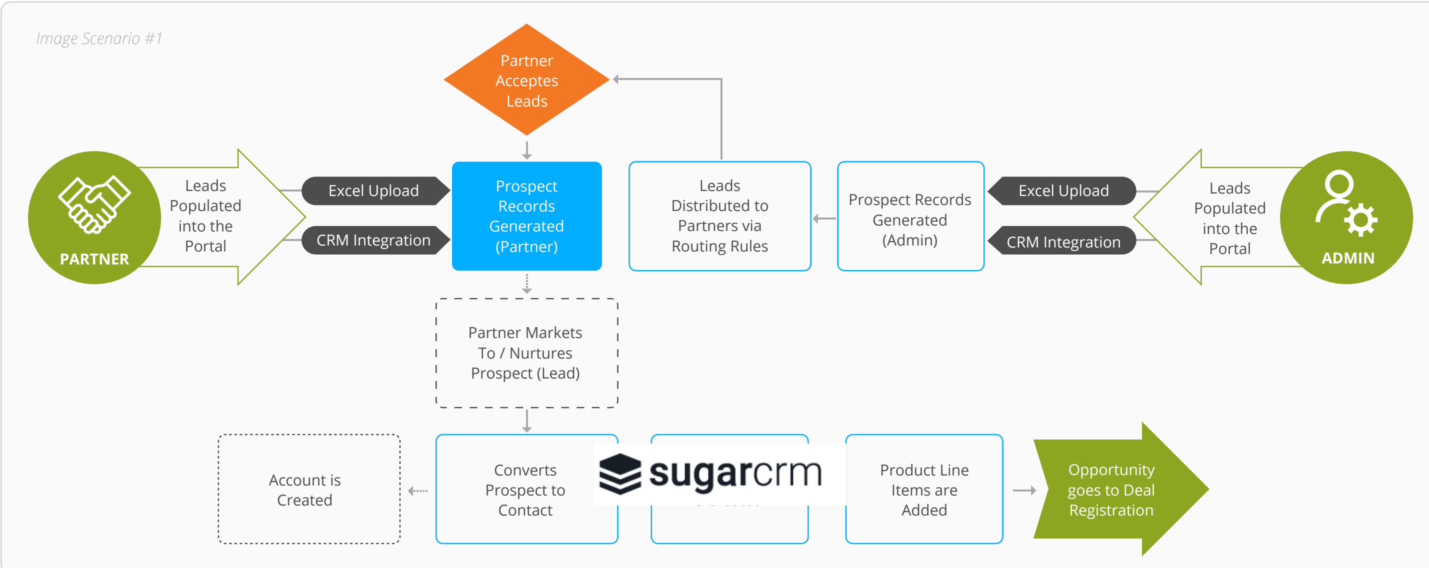
  Scenario #1 (Out of the Box)

  ZINFI standard functionality is where:

  - *The Partner themselves load up or import Prospects (leads) into the Partner Portal to work or*
  - *The OEM Admin takes pre-qualified lead(s) from their Sugar Sell instance (via sync or Excel export upload) and distributes it to a Partner in the Partner Portal.*

  Upon receiving the Prospect (lead) at UCM, the Partner starts working on it, converts it to a Contact, creates an Opportunity (tagged with this Contact and their respective Account.) The Opportunity is visible to the Admin in the Partner portal, or it gets synced back to the Admin's Sugar Sell instance, where they can have visibility into the lifecycle of this converted lead – through Opportunity and into Registered Deal.

Timeframe & Configuration Details



Rough estimate of the typical configuration and enablement of this scenario:

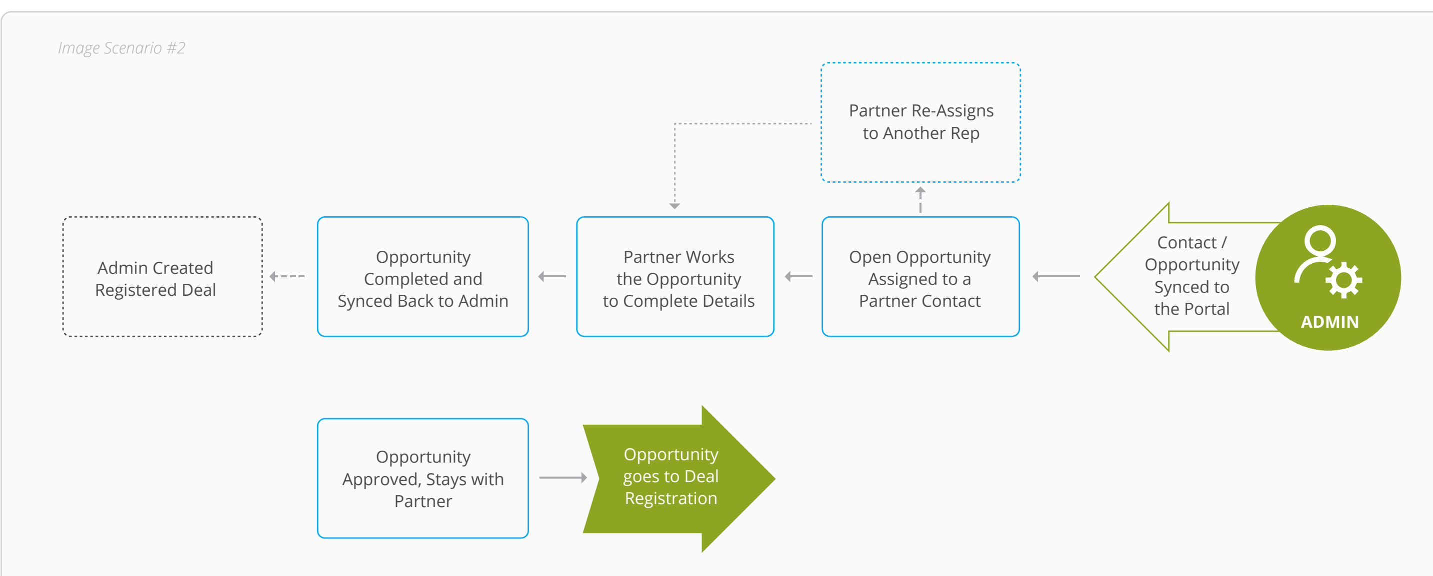
- *3 Days (inclusive of Development, Configuration and QA)*

Some of the requirements or configuration key points to consider:

- *Sandbox Details and Access*
- *Default Fields for extra Fields logic*
- *Customization needed*
- *Service Endpoints Configuration*
- *Handling of Sync Anomaly*
- *Normal Lifecycle of the Lead*

Scenario #2 (Account-Based Opportunity Assignment)

The OEM Admin takes a pre-qualified lead (already in the Contact stage) from their Sugar Sell instance, and assigns it to a Partner/Distributor - as an Open Opportunity (without an estimated amount & estimated close date). The Partner at UCM, receives the lead is now allowed to work on that Opportunity or assign it to any other rep (Partner Contact) from their organization (Partner Account). The Partner now works on the Contact Lead, and then - based on the engagement with the Contact - identifies the estimated amount and estimated close date of the Opportunity. Once the details are identified, the Partner updates the Opportunity record, and it is synced back to the OEM Admin's Sugar Sell



instance. At this point, the Admin can create the Registered Deal, or pass the approved opportunity back to the Partner to create the Deal for Approval. This scenario can also have an additional step, wherein after receiving the Contact Lead and Open Opportunity – the Partner re-assigns this Opportunity to another individual within their organization. Once that Partner User completes the Opportunity details, that record is synced back to the OEM Admin's Sugar Sell instance – and the original Partner recipient still has visibility into it.

Typical Timeframe & Configuration Details

Rough estimate of the typical configuration and enablement of this scenario:

- *4 Days (inclusive of Development, Configuration and QA)*

Some of the requirements or configuration key points to consider:

- *Sandbox Details and Access*
- *Default Fields for extra Fields logic*
- *Field Details*
- *Service Endpoints Configuration*
- *Handling of Sync Anomaly*
- *Normal Lifecycle of the Lead*
- *Access Management (Record Visibility)*

Scenario #3 (Shark Tank Assignment)

The OEM Admin takes pre-qualified lead(s) from their Sugar Sell instance and assigns the lead to a criteria-based "Shark Tank" (where Partners within that criteria group can grab the lead on a first come, first server basis). Let's say the criteria is "Country", so all partners from that country get an email notification that a new Prospect (lead) has arrived in their Inbox. The first Partner to go and accept that lead gets it. Now, they have a certain timeframe to achieve certain criteria to retain that lead (establish contact, convert it to a Contact, execute a Marketing Tactic/Campaign to that Prospect, etc.). If they meet these requirements in this timeframe, they retain the Prospect (now a Contact) – and can take it further into Opportunity or Registered Deal. If they fail, the Prospect is taken back from them and put back into the Shark Tank (where all the other Partners can now compete to accept it, and this first Partner is further excluded).

Typical Timeframe & Configuration Details

Rough estimate of the typical configuration and enablement of this scenario:

- *6 Days (inclusive of Development, Configuration and QA)*

Some of the requirements or configuration key points to consider:

- *Shark Tank Logical Details*
- *Sandbox Details and Access*
- *Default Fields for extra Fields logic*
- *Field Details*
- *Service Endpoints Configuration*
- *Marketing Tactic/Campaign Configuration*
- *Access Management (Record Visibility)*

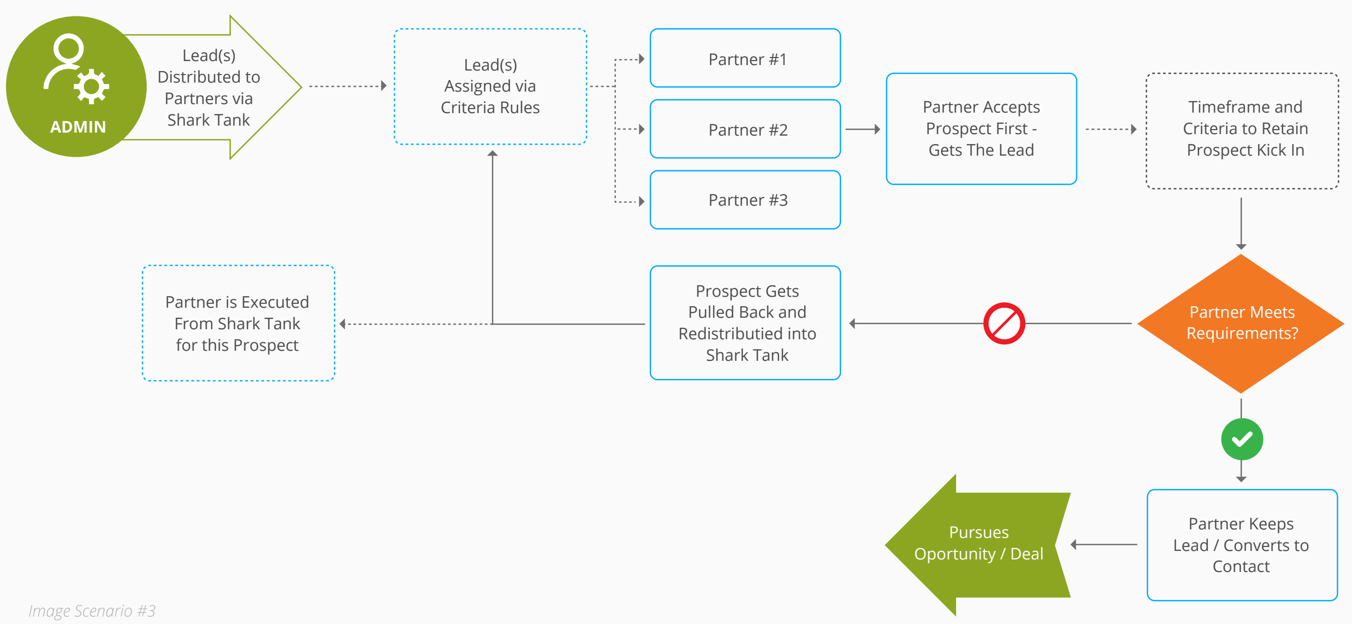
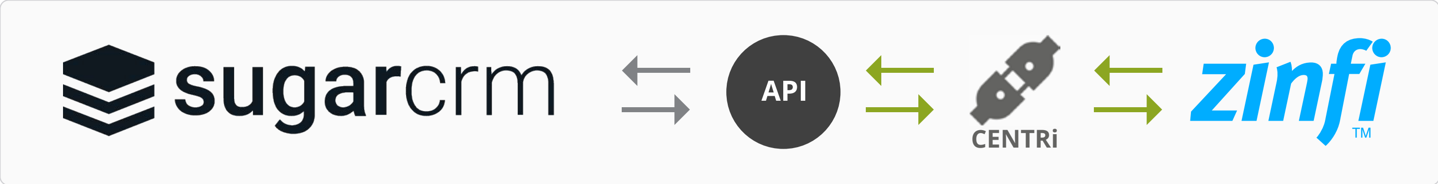


Image Scenario #3

8 How to Connect to SugarCRM



UCM's CENTRi offers you a convenient and easy way to integrate Sugar with no coding.

ZINFI's Centralized Interconnect (CENTRi™) integration engine is the core driver; providing orchestration of stateless and internal/external functions, such as APIs, SSO and OAuth. Utilizing these functions or services, CENTRi provides a way to implement complex end-to-end business capabilities with Sugar APIs. UCM API powers the integration process by providing an easy-to-use and simple web service API for integrating Sugar Sell with UCM. The UCM API is easy to integrate with any HTTP aware applications of various technologies. Integration of the API with Sugar Sell requires basic familiarity with web services, HTTP methods, JSON and ZINFI's UCM platform.

The API Integration supports the following synchronization feature set:

- *Load Data to any Direction* - CENTRi offers a number of benefits for import Sugar Sell data to UCM or vice versa. With CENTRi you can build and use data filtering, perform data transformations, and many more. Besides, CENTRi supports the UPSERT operation — inserting new records and updating records already existing in the target. This allows importing data without creating duplicates for existing target records.

- *Bi-directional Data* - With CENTRi you can easily perform bi-directional data synchronization between UCM and Sugar Sell. When performing the synchronization periodically, CENTRi does not load all the data each time. It tracks changes in the synchronized data sources and performs only necessary data changes. It offers powerful mapping features, allowing you to sync data with different structure.

- *Sync New and Updated Data* - CENTRi can load only new and modified records from UCM to Sugar Sell and vice versa. Thus, you can use import for performing one-way sync.

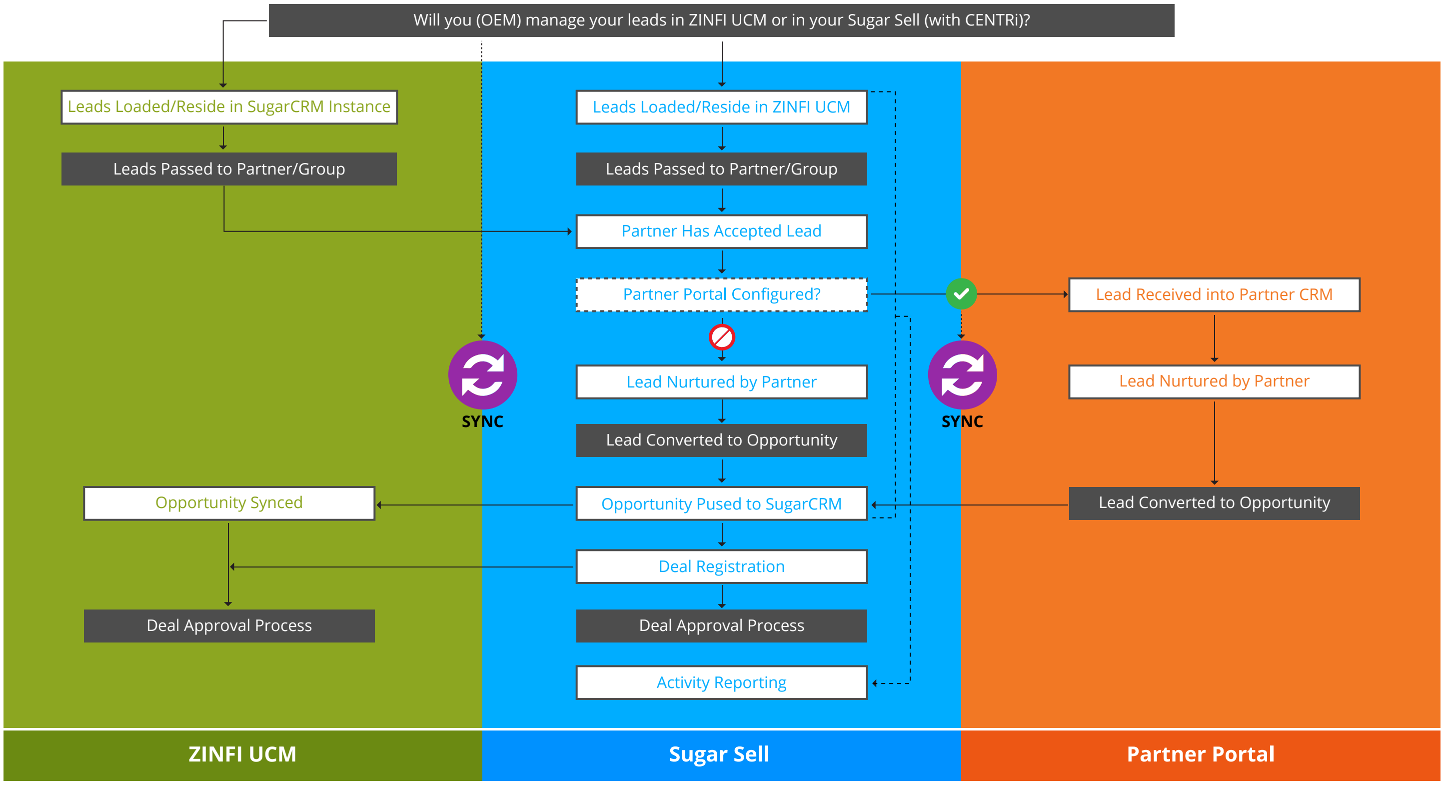
Integration Process Summary

Integration Requisites

Process	Summary
Designing Integration within Sugar	Create and manage the design objects needed for your integration scenario.
Configuring Integration within Sugar	Configure the required integration objects.
Designing and Configuring Integration within ZINFI UCM	Design and configure the relevant integration scenarios, including business objects, mapping, routing and so on in ZINFI UCM.
Handling Messages across Sugar and ZINFI UCM	Integration process (Web Service APIs) is configured and validated with ZINFI UCM, and handshaking is established. No user actions are involved during message handling. Incoming messages are processed and sent to the relevant receiver; a message can include integration processes.
	Note: It is important to consider where the process flow is initiated. For example, the Sugar Sell instance might need to determine the receiver and all relevant steps in getting a message, or it might need to send the JSON a message using technical adapters to ZINFI UCM or vice-versa.
Monitoring Processes	Monitor message processing, including throughput and performance of the appropriate integration technology.

Integration Use Cases

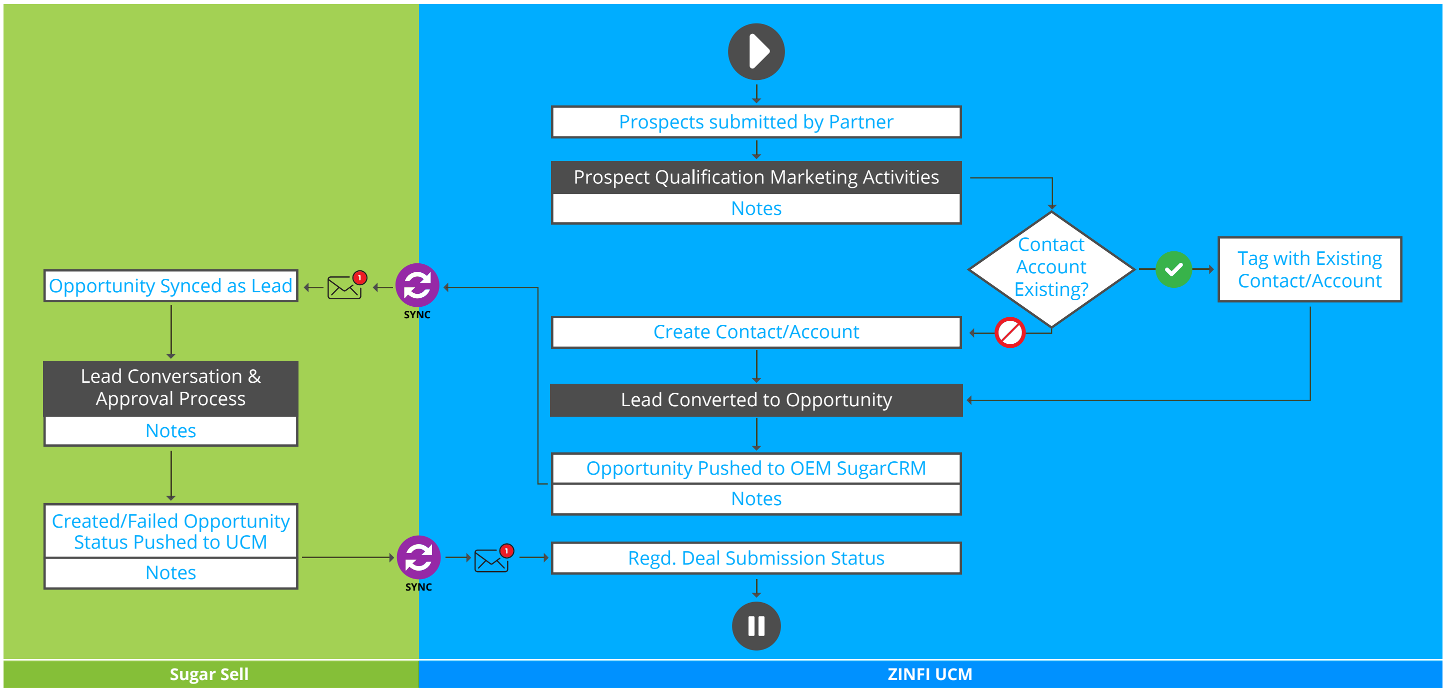
Use Case 1



Activities Performed

1.	Automated Process	–	Partner accounts are auto-synced
2.	CRM Admin	–	Lead creation in Sugar Sell/ZINFI UCM
3.	CRM Admin	–	Lead assignment to partner in UCM initiated
4.	Automated Process	–	Sugar Sell lead syncing with UCM
5.	Partner	–	View details of assigned lead and acceptance
6.	Partner	–	Lead assigned to Partner Rep in Partner Portal initiated
7.	Automated Process	–	UCM lead sent to Partner Portal
8.	Partner	–	Lead nurturing process initiated in Partner Portal/UCM
9.	Partner	–	Lead conversion to opportunity in Partner Portal/UCM
10.	Automated Process	–	Partner Portal opportunity with contact and account auto syncs in UCM with Opportunity, Account & Contact
11.	Automated Process	–	UCM Opportunity syncs as lead in OEM Sugar Sell

Use Case 2



Activities Performed

1. Automated – Partner accounts are auto-synced
2. Partner – Lead creation in UCM
3. Partner – Lead nurturing and conversion in UCM
4. Partner – Opportunity Addition in UCM
5. Automated Process – UCM Opportunity syncs as Sugar Sell Lead along with contact, account and notes
6. CRM Admin – Lead conversion in Sugar Sell
7. CRM Admin – Opportunity approval in Sugar Sell
8. Automated Process – Sugar Sell opportunity status auto-updated in UCM

Mapped Modules

Sugar	UCM
Leads	Leads
Accounts	Accounts
Contacts	Contacts
Notes	Notes
Opportunity	Opportunity

❼ Definition of Unified Channel Management (UCM)

Unified Channel Management (UCM) allows a vendor organization selling through the channel to take an integrated approach by aligning channel policies, channel programs, channel people (both internal employees supporting the partner base and employees of external partners), business process automation and channel partners to build a high-performing global channel. This unified approach to channel management requires end-to-end automation of three core sub-processes:

- Partner Relationship Management (PRM) – These partner management activities focus on optimizing and automating internal partner management processes to make it easier for partners to do business with the vendor. A properly configured PRM solution significantly reduces operation costs, efficiently allocates resources behind the partners who have the highest potential for driving profitable growth and significantly increases partner satisfaction

- Partner Marketing Management (PMM) – These channel marketing activities focus on enabling channel partners to drive demand from their prospect and customer based by leveraging the vendor's marketing assets and tools. A PMM solution can help vendors optimize the use of market development funds, stimulate purpose-driven demand generation and exert control over brand extension via channel partners.

- Partner Sales Management (PSM) – These channel sales enablement activities focus on enabling both internal channel-focused resources (channel account manager, field marketing managers, distribution managers, etc.) and channel partners to close more deals faster. A properly deployed PSM solution gives marketing and sales team members insight into the effectiveness of specific marketing assets, and sales campaigns and can significantly increase sales closure rates and predictability via a distributed partner network.

Core Modules Overview

Native Applications for Mobile Devices

The Mobile module comes with a set of mobile apps that are available for both the iOS and Android platforms. Administrators can define what applications are available via mobile app and what users have the access rights via mobile.

Identify and Access Management (IAM)

With the Identify and Access Management (IAM) module, administrators can dynamically set up and manage users, groups and granular access rights to various portal pages, applications, campaign contents and assets.

Alerts & Notification Management

The Alert module aggregates all system alerts via a unified console and allows users to set one or more notification preferences via email, SMS or mobile app. Users can also control the frequency of alerts, including individual or aggregate alerts.

Enterprise Change Management

Enterprise Change Management keeps track of all changes made to the portal related to groups, users, content, workflows, etc. This is essential for audit purposes but also for reversing changes that have been made unintentionally or intentionally.

FluidCMS™ Content Management

The FluidCMS™ module allows administrators to use drag-and-drop tools to create and manage web and campaign content to build dynamic and personalized portal pages, campaigns and other content on the fly.

Business Intelligence Reports

The Business Intelligence Reports module provides hundreds of default reports as well as tools for creating custom reports. This allows users to understand what is working and what needs improvement in channel performance/ programs at a local and global level.

FlexiFlow™ Workflow Management

Using FlexiFlow™, administrators can set up different application layouts, approval logics, alerts, reports and other functions to automate any business workflows. This capability allows organizations to dynamically adapt to rapidly changing business needs.

Centralized Interconnection (CENTRi™) Management

The CENTRi™ (Centralized Interconnection) module allows administrators to seamlessly connect to third-party applications like CRM, LMS, ERP and POS via an easy-to-use connection management and field mapping interface, including SAML 2.0 SSO.

Partners Profile Management

Partners Profile Management granularly manages partner records - accounts, contacts, performance data, etc. Using this module, organizations can segment partners effectively into groups with various parameters for optimized management capabilities.

Users & Group Management

The Users Management module allows administrators to quickly set up users and assign them to various groups and profiles. Users can be added manually or set up via group upload using Excel or third-party SSO.

Expanded Modules Overview

Products Details Management

With the Products module, organizations can upload variety of product-related content for use in both marketing and sales assets and activities. This module can also be used for Configure Price Quote (CPQ) and deal registration.

Documents Library Management

Documents Library enables channel organizations to share partner-facing documents with various partner users based on status and access rights. Documents can be dynamically published and configured with expiration dates/times based on custom rules.

Projects & Tasks Management

Seamless collaboration with internal and external team members on projects and programs is easy with the Project module, which comes with tasks, notebooks, file-sharing and messaging features.

Co-Branded Assets Management

The Co-Branded Assets Management module enables an organization to provide digital assets to channel partners, who can then co-brand these assets and reuse them for various marketing- and sales-related activities.

Communicate To Partners Management

The Communicate module comes with a cluster of marketing tools, such as email, microsites, events and social, which can be used to recruit, engage and enable partners. These tools can be made available to all internal channel team members.

Partner Support Management

The Support (Help Desk) module gives organizations the tools they need to establish a structured support infrastructure for end users that extends above and beyond traditional product and services support. The module uses an industry-standard ticketing system.

Marketplace Management

Organizations can use the Marketplace to establish a list of complimentary products and services that the partners can purchase for their business use. This module provides complete order management capabilities to third-party providers.

Community & Discussions Management

The Community module enables organizations to socially connect—both internally and externally—to facilitate communication and collaboration. This module seamlessly integrates with multiple UCM modules, but it can also work in a standalone fashion.

Partner Survey Management

The Survey module can be used by anyone from the channel organization to get feedback from their partner base. Survey data can be aggregated via a reporting engine or housed individually within partner records.

Partner Locator Management

Use Partner Locator to dynamically create a partner directory - making it easy for end users to find and contact partners who offer the right solutions. All leads generated from rule-based searches are fed into the UCM Lead module for distribution to specified users.

Partner Relationship Management (PRM)

Modules Overview

Partner Business Plans Management

The Partner Business Plans Management module enables an organization to develop business plans by working with internal and external partner stakeholders to ensure plan execution and compliance.

Deals Registration Management

Deals provides set up for deal registration criteria and workflows for their partner base using UCM's FlexiFlow and CENTRi modules. Workflows can be very simple or can cover complex, comprehensive deal registration processes.

Partner Contracts Management

The Partner Contracts Management module enables an organization to dynamically manage and keep track of all the contractual documents that channel partners sign during the various phases of the partner engagement cycle.

Rebates Management

With Rebates, set up company rebates based on various performance targets and business rules. This makes it easy to set up an application process for partners to establish eligibility for rebate programs, as well as claiming rebates.

Partner Learning Management

The Partner Learning Management module enables an organization to manage channel partner training and certification by various partner tiers and types to grow partner competencies in a systematic way through structured curricula.

Partner Leads Management

Partner Leads Management enables lead distribution to your partner base and manages the entire "contacts to contracts" process. It can help engage partner sales reps via round robin, shark tank and other lead management strategies.

Partner Onboarding Management

Partner Onboarding Management automates partner recruitment and onboarding processes via step-by-step activities. Based on partner type, engagement and other variables, you can create different onboarding tracks.

Market Development Funds (MDF) Management

Market Development Funds Management enables organizations to allocate MDF and co-op funds to partners. Its also used to help partners apply for program funding and claim compensation through proper proof of execution.

Partner Marketing Management (PMM)

Modules Overview

Search Marketing Management

The Search Marketing Management module provides dynamic linkage between paid ad (Google AdWords, Facebook, etc.) search network and marketing campaigns, and is used for multi-partner inbound integrated lead generation.

Microsite & Landing Page Management

The Microsite & Landing Page Management module enables an organization to set up co-branded microsites or landing pages. This allows partners to engage their prospects and customers via single-touch or multi-touch digital drip campaigns.

Social Syndication Management

The Social Syndication Management module enables an organization to syndicate social media content via the channel partner network. Partners can autostream or manually customize each social feed for instant or delayed posting.

Event Marketing Management

Event Marketing Management enables an organization to set up trigger-ready multi-touch "event in a box" campaigns that can be quickly co-branded and customized, allowing channel partners to engage their prospects/customer base.

Direct Mail Marketing Management

The Direct Mail module allows for set up of co-branded direct mail templates for partner use in the form of post cards, brochures and other formats. This module can also be connected to national printers for seamless shipping and mailing.

Web Syndication Management

Web Syndication Management enables distribution of product and solution web showcases via a partner's website. Web syndication amplifies organizational reach and lead generation through a distributed channel partner network.

Email Marketing Management

The Email Marketing Management module enables an organization to set up multi-touch co-branded emails. These emails create the foundation of various integrated campaigns, whether they lead to microsites, events, syndication or call campaigns.

Campaign Library Management

The Campaign Library module enables channel organizations to provide co-brandable, single- or multi-tactic campaigns to its partner network through a user-friendly, logical interface searchable by keywords and tags.

Partner Sales Management (PSM)

Modules Overview

Rapid Dialer Management

The Rapid Dialer Management module provides a high-volume automated dialing capability to partner sales reps for more efficient telemarketing. The module makes it easy for reps to follow up on leads and develop sales qualified opportunities.

Buyers Engagement Management

The Buyers Engagement Management module provides tools for channel sales reps and their partner reps for sending digital content such as emails, landing pages and solution showcases to prospects, and for tracking engagement.

Configure Price Quote (CPQ) Management

The Configure Price Quote (CPQ) module enables an organization to offer special pricing and quotes approval mechanisms for partner sales reps, channel reps and channel management team members.

Channel Data Management (CDM)

The Channel Data Management module enables an organization to access point-of-sales data from distributors and resellers to track performance by region, territory, reseller and product, and to proactively manage inventory.

Sales Gamification Management

The Sales Gamification Management module enables an organization to promote various sales rewards programs. Organizations can use a leaderboard to stimulate competition and drive rep engagement in a virtual environment.

Commissions Management

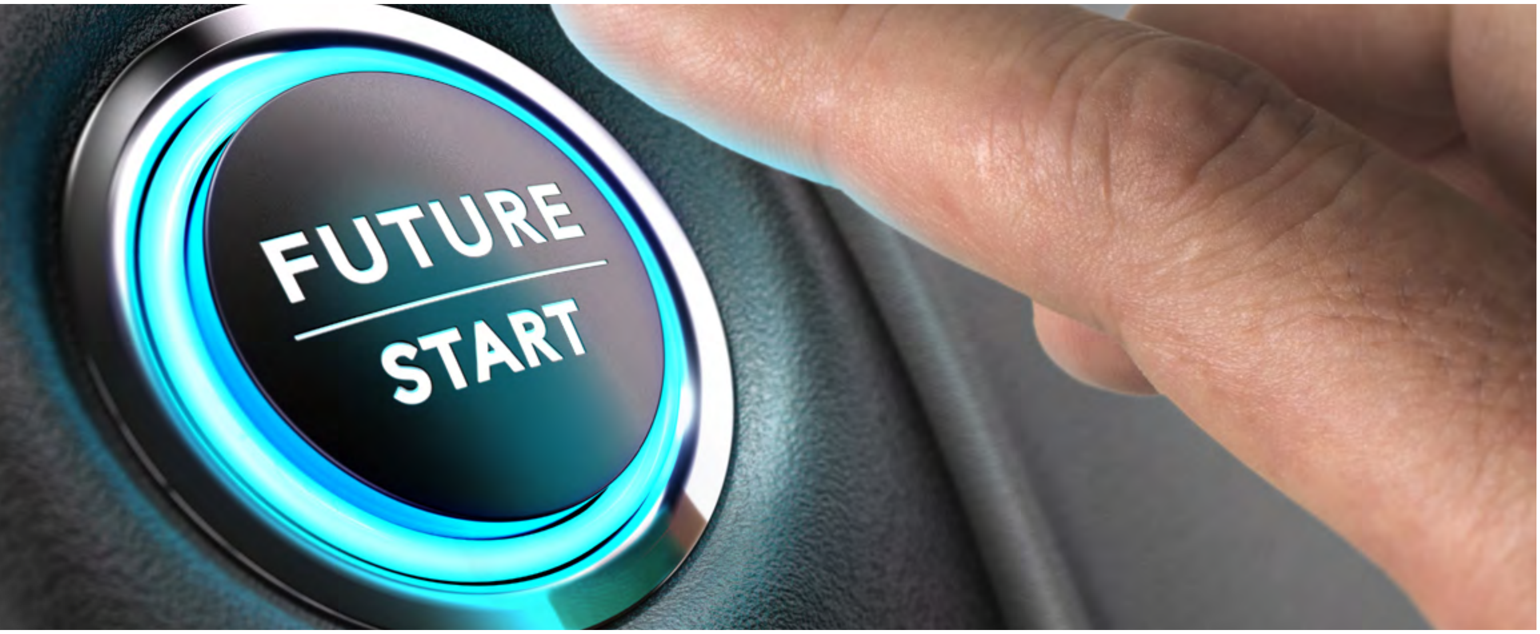
Both internal channel teams and external partners can use the Commission model to align with quarterly programs, campaigns and run rate business. Users can set up business logic with UCM's FlexiFlow module.

Sales Rewards Management

Sales Rewards allows set up of channel sales programs for internal/external users & progress tracking in a unified interface. This module also allows filing of reward claims & stack ranking status. The logic is built via UCM's FlexiFlow module.

Sales Desk Management

The Sales Desk module seamlessly integrates with the Leads, Deals, Support and CPQ modules to provide a unified dashboard for order management. Both internal and external users can access this dashboard to communicate and track status.



About ZINFI

ZINFI Technologies, the leader in Unified Channel Management (UCM) innovation, enables vendors and their channel partners to achieve profitable growth predictably and rapidly on a worldwide level. Headquartered in Silicon Valley, USA and founded by channel veterans with extensive global channel management experience, we at ZINFI see an immense opportunity to build high-performing sales channels by deploying an easy-to-use, comprehensive Unified Channel Management platform that streamlines and manages the entire partner lifecycle.

ZINFI's Unified Channel Management innovation incorporates three core state-of-the-art SaaS applications—partner relationship management automation, channel marketing management automation and channel sales management automation. In 26 countries, these three core UCM SaaS applications are also locally supported by ZINFI's global marketing services team members.

ZINFI's Unified Channel Management solutions enable organizations selling via the channel to integrate the full spectrum of channel partner management activities—from recruitment, onboarding, training and certification to lead management, co-branded demand generation, sales performance and success, and on to fulfillment and renewal management. Powered by the efficacy and superior experience of ZINFI's UCM solutions, any organization can build a high-performing channel and realize increased partner sales return on investment.

The word ZINFI, to us, means Zero to Infinity—reflecting our mission to enable customers, employees and communities to realize their infinite potentials. In its most applied form in our day-to-day existence, the word refers to an analytical and mathematical approach to marketing and sales methodologies, an approach that allows our customers to realize the true potential of their own products and services and to continuously grow their business via the channel.

About SugarCRM

SugarCRM is a customer experience management leader enabling businesses to create profitable customer relationships by delivering highly relevant, personalized experiences throughout the customer journey. We empower companies to strengthen existing customer relationships, create new ones through actionable insights and intelligent automation and better understand the customer every stage of the journey. This enables businesses to accelerate demand generation, grow revenue, deliver superior customer care and increase loyalty. Our easy-to-use, intuitive platform makes customer experience management easy and accessible for everyone, allowing marketing, sales and services professionals to focus on high-impact, value-added activities that create customers for life.

Based in Silicon Valley, SugarCRM is backed by Accel-KKR. More than 2 million individuals in over 120 countries rely on SugarCRM.

To learn more visit http://www.sugarcrm.com or follow @SugarCRM.

www.zinfi.com

Contact Us

AMERICAS

sales.noram@zinfitech.com
6200 Stoneridge Mall Road, Suite 300
Pleasanton, CA 94588
United States of America

EUROPE, MIDDLE EAST AND AFRICA

sales.emea@zinfitech.com
Davidson House
Forbury Square, Reading
RG1 3EU, United Kingdom

ASIA PACIFIC

sales.apj@zinfitech.com
3 Temasek Avenue
#21-00 Centennial Tower
Singapore 039190

Australia • Brazil • China • France • Hong Kong • India • Italy • Japan • Korea • Singapore • UK • USA