

Managing resellers is a multifaceted task. It requires solid planning and vigorous execution of the plan. This document is designed to clearly define the reseller's sales & marketing plan as it relates to the Vendor's product(s) and measures progress to plan on a quarterly basis.

Critical to the success of any reseller relationship is sales training & product certification. This document identifies the sales personnel and technical specialists who will be responsible for delivery of the Vendor's product(s) and sets forth due-by dates.

The assigned Channel Manager's partner support responsibilities are defined by event specific activities.

Channel Managers are often compensated by MBOs with associated task completion dates. This document provides a gauge to measure and track their performance.

NOTE: The new reseller should be introduced to this process during the prospecting cycle so that they will understand, before signing the reseller agreement, the expectations to which they will be held.

Reseller Sales/Marketing Business Plan

Reseller:	Sales Rep (Primary Contact):
Address:	Phone:
City, State, Zip	Fax:
Agreement date:	12 Month Plan Period:

Authorized Signatures	
Reseller Signatures:	Vendor Signatures:
Reseller Officer	Channel Manager
Reseller Marketing Manager	Marketing Director

Vendor Product Certification (Sales/Technical)			
Vendor Sponsored Course Title	Name/Title	Due Date	Completed Date:
Sales 101 (Example)	B. Closer (Sales)	6/1/04	Pending
Sys. Admin Training (Example)	I.M. Trainer (Tech)	Q1	Q1
Script Writing (Example)	R. Smart (Tech)	Q1	Missed
API Configuration (Example)	R. Smart (Tech)	Q1	Missed

Vendor Invoiced Product Forecast					
Previous Year's Forecast:		Previous Year's Actual:			
	Q1 Period:	Q2 Period:	Q3 Period:	Q4 Period:	TOTAL Period:
Vendor Revenue Forecast (at invoice):	\$10K	\$55K	\$35K	\$100K	\$200K
Actual Invoice Totals (Complete During Quarterly Review)	\$20K				
Percent (%) of Target	+200%				

Business Metrics			
Based on forecasted revenue, identify percentages of revenues from individual market segments (Tech. and/or Industry):		Based on forecasted revenues, forecast mix of Vendor products:	
Market Segment	% Rev.	Product	% Rev
Security (Technology Example)	%	"Firewall Plus" (Example)	%
Telco (Industry Example)	%	"Billing Agent Plus" (Example)	%
	100%		100%

Quarterly Plan

Objectives and Action Items for Q_____

Establish objectives and action items, and review results at the end of the quarter by comparing planned activities to actuals. Quarterly objectives and action items should match your annual business objectives and targeted end-user opportunities.

This section may also include phased activities designed to impact long-term plan.

Time period: _____ to _____ 20____

Quarterly forecast at Invoice:	Quarterly Actual at Invoice:	Est. Vendor Co-Op for this Quarter (optional):
\$	\$	\$

Objectives (Expand list as needed):				
Item # (Prioritize)	Action Items	Budget	Name/Title	Completed ?
1	Market to existing account base (Example)	\$3K	B. Closer (Sales) & C. Stuff (Mkt)	
2	Hire Jr. Marketing Executive	\$6K	Jill - HR	

Target Account Quarterly Plan

Targeted End-User Opportunities for Q_____

This section identifies your top end-user targets (minimum 5) and develops a joint action plan with the assistance of your Vendor Channel Manager. Your quarterly objectives and actions items should support these sales opportunities. Reseller and Vendor representative on a quarterly basis will review objectives, action items, and account opportunities.

Time period: _____ to _____ 20____

Top End-User Opportunities for This Quarter					
Company Name	Application /Solution	Vendor Products	Est. Sale at Invoice	Status	Close Date
1. Acme Widget	CRM	"Help Desk"	\$20K	On short-list	
2. FloorMart	Supply Chain	"Track-IT"	\$30K	1 st Cold Call	
Est. Vendor Sales \$ Total at List:			\$		
Actual Vendor Sales \$ Total at List:			\$		

Channel Manager Task List -- Top End-User Opportunities (see above)		
Company Name	Channel Manager Tasks	Completed Date
1. Acme Widget	Deliver competitive "Help Desk" information, schedule final scripted demo and secure resources. Prepare for last minute "Competitive" discount approval	2/28/04
2. FloorMart	Coordinate between Direct Sales and Reseller partner. This will be a split deal.	Pending