



Partner Onboarding Insights

Part One: Lifecycle Engagement Strategies

Authors:

Kylinn Kraemer, MA, Business Intelligence Manager

Kris Blackmon, Channel Community Leader

Methodology: Client Segmentation

In today's competitive landscape, understanding user engagement patterns is paramount for suppliers aiming to optimize their partnership programs. As a key stakeholder, you may often find yourself questioning the depth of your partners' engagement with your platform and program, wondering about the factors influencing their behavior, or seeking ways to improve overall engagement. At Zift, we recognize the importance of these concerns and have done a deep dive into our data to provide actionable insights.

Our client base using the ZiftONE platform spans a wide spectrum, from industry giants to burgeoning startups. To facilitate a more structured analysis, we've segmented our clients into two primary categories:

- **Large-Scale Clients:** Defined as enterprises boasting revenues in excess of \$1 billion. These titans typically manage vast partnership programs, potentially leading to a higher volume of users on our platform.
- **Small-Scale Clients:** Entities generating revenues under \$50 million. Their partnership programs may be specialized, focusing on a more segmented market or specific collaborations.

While initial data might suggest stark differences in login frequencies between these categories, it's essential to interpret this with caution. Sheer volume of logins might be influenced by the inherent size of the partner programs and may not necessarily indicate engagement intensity or effectiveness.

In the following sections, we'll meticulously examine login trends, user behaviors during and post-onboarding, and the differential effectiveness of various onboarding tasks. Graphical representations will offer a visual overview, but the crux of our findings will be embedded in the nuanced narratives and analyses that follow.

Our objective is to equip you with a comprehensive understanding of your partners' engagement patterns, enabling you to make informed decisions for future strategies and optimizations.



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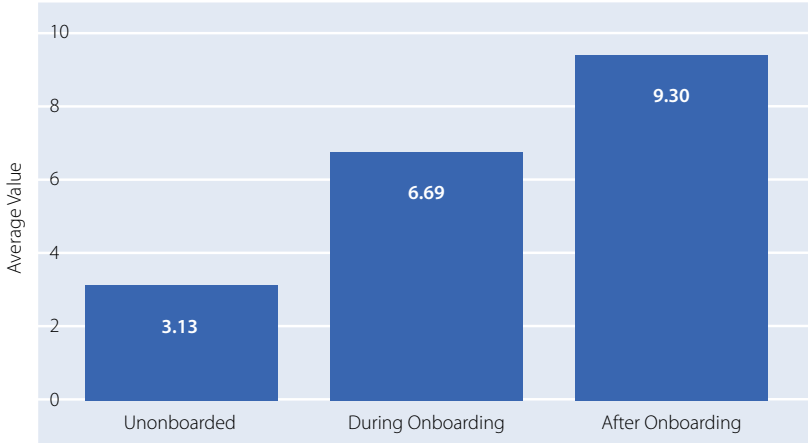
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Onboarding Engagement Report for Zift's Large-Scale Clients: Analysis and Findings

Here, we take a closer look at how new partners are getting on board with the ZiftONE platform through their respective vendors specific to our Large-Scale clients. We've examined the data to understand what's working and what's not in terms of keeping these partners engaged. A big part of our focus has been on how often they log in — a crucial measure of their engagement. Using Zift proprietary data, we will give you actionable takeaways to improve partner onboarding engagement.



Graph 1: Average Login Frequency for Unboarded Users, User during Onboarding, and Users After Onboarding (Large-Scale)

1. Pre-Onboarding Phase: Establishing a Baseline

Initial Engagement Level: Prior to onboarding, the average partner logs into the ZiftONE platform slightly over three times per month. This phase is crucial for setting the baseline of user engagement. It is characterized by low interaction levels, where partners are primarily engaged in familiarizing themselves with the platform's interface and the bare bones of vendor's partner program, exploring available resources, and understanding vendor's communication strategies. At this juncture, the platform serves more as an information repository rather than an interactive tool, explaining the relatively infrequent logins.

2. During Onboarding: Engagement Amplification Strategies

Strategic Onboarding Tasks: During the onboarding process, the login frequency jumps to 6.69 times per month. This significant increase can be attributed to specific engagement strategies employed by vendor, as well as the fact that many vendors require partners to complete onboarding

before being authorized to sell. These engagement strategies might include interactive onboarding tasks, personalized tutorials, and incentivized activities that encourage frequent platform interaction. The design of these tasks likely integrates elements of gamification and real-time feedback, making the onboarding process not only informative but also engaging.

3. Post-Onboarding: Sustaining Engagement

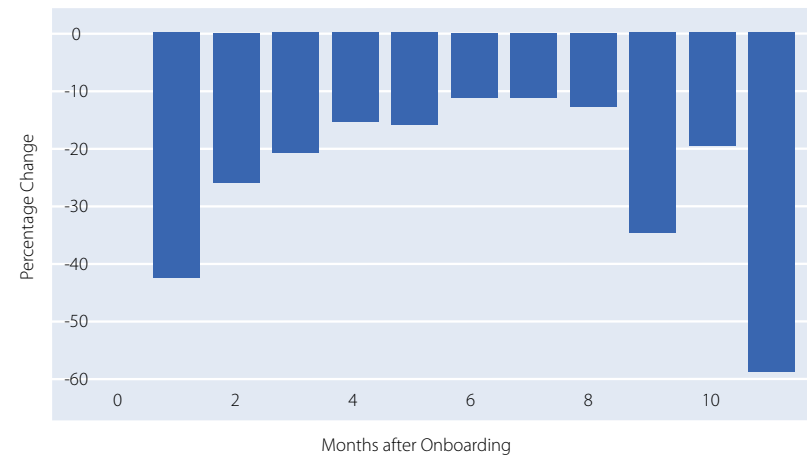
Long-Term Engagement Techniques: After onboarding, there's an uptick in login frequency to 9.3 times per month. This suggests that the onboarding process successfully transitions users from passive observers to active participants. Post-onboarding, vendor likely employs strategies such as regular content updates, advanced feature introductions, and continuous learning opportunities to sustain and enhance user engagement. These tactics aim to embed the platform as a critical part of the partners' regular workflows.

4. Unboarded Users: Identifying Engagement Gaps

Contrasting Engagement Patterns: In stark contrast, unboarded users maintain a lower engagement level, with login frequencies hovering between 2.8 and 3.6 times per month. This gap indicates the potential missed opportunities for engagement in users who do not complete onboarding tasks. It highlights the need for vendor to implement pre-onboarding engagement boosters, such as teaser content, preliminary interactive tasks, or initial personal outreach to increase early-stage interaction.

5. Post-Onboarding User Activity: Addressing Drop-off

Challenges in Sustaining Active Users: Despite high login frequencies, there is a decline in the number of active users post-onboarding. This suggests that while the onboarding process is effective in boosting login frequency, it may not be sufficient in maintaining long-term active user engagement. In this sample, we can see significant drop offs in user logins within the 1st, 9th, and 11th months after onboarding. This may vary across samples, but it is important to promote continuous and ongoing engagement programs as drop offs are not always obvious without in-depth analysis such as this. To address this, vendors could consider implementing continuous engagement programs, like monthly challenges, community-building activities such as peer groups or user groups, or regular personalized communication, to keep users invested in the platform and program.



Graph 2: Percentage Change in Number of Logged-In Users Over Time (Large-Scale)

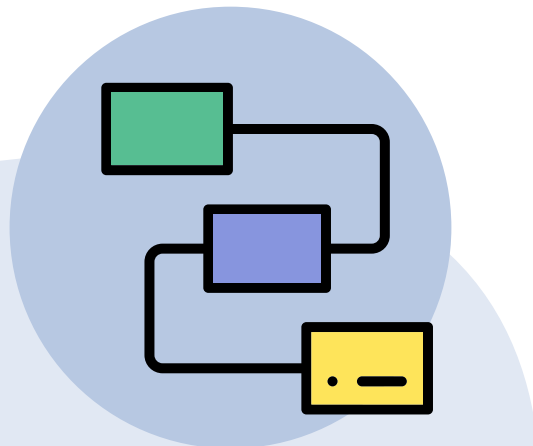
Strategic Recommendations per Phase for Large-Scale Clients

1. Pre-Onboarding Engagement Boosters

Interactive Platform Introduction: Create an immersive introductory experience for new partners with virtual platform tours, enabling them to visualize the potential impact on their business.

Early Incentives: Offer early-stage incentives such as access to exclusive content or early bird bonuses to encourage partners to begin exploring the platform and program even before the formal onboarding process starts.

Initial Engagement Tracking: Utilize analytics to track early engagement and tailor follow-up communications to encourage deeper exploration of the platform's features and the program's nuances, which in turn prompts further exploration of vendor's program and value proposition.



2. Interactive and Incentivized Onboarding Experience

Customizable Learning Paths: Develop customizable onboarding paths that adapt to the unique needs and interests of each partner segment, ensuring relevance and maintaining engagement.

Gamification Strategies: Integrate gamified elements such as points, leaderboards, and badges to make the onboarding process more dynamic and rewarding.

3. Post-Onboarding Engagement Initiatives

Regular Feature Highlights: Regularly highlight new features and provide training to encourage ongoing program engagement and demonstrate continuous value.

Advanced User Communities: Establish communities of advanced users who can share best practices, which will help maintain engagement and promote peer-to-peer learning.

Recognition Programs: Create recognition programs to spotlight successful partner use cases, reinforcing the benefits of active program engagement.

4. Tailored Post-Onboarding Communication

Personalized Check-Ins: Schedule personalized check-ins using CRM data to offer tailored advice on how partners can better utilize the platform for their specific needs.

Feedback Loops: Implement structured feedback loops to gather insights on user experience post-onboarding, using this data to refine the onboarding process and post-onboarding support.

Content Customization: Deliver customized content such as industry-specific insights, success stories, and practical tips that resonate with partners' business challenges and goals.

5. Continuous Learning and Development

Ongoing Training Sessions: Provide ongoing, scheduled training sessions covering both foundational and advanced topics to support partners' continued learning and development.

Engagement Milestones: Establish clear milestones post-onboarding with corresponding rewards, ensuring partners have concrete goals to aim for in their platform journey.

6. Re-Engagement Strategies

Proactive Re-Engagement Campaigns: Deploy proactive re-engagement campaigns targeting users who show signs of reduced activity, with personalized messages to bring them back into active platform use and program engagement.

Program Update Announcements: Regularly communicate program updates and enhancements, linking them back to the tangible benefits for the partner's business, to encourage revisitation and exploration of new functionalities.

By enriching the strategic recommendations with these detailed initiatives, Large-Scale clients will be better positioned to leverage the ZiftONE platform and vendor's overall programmatic approach for maximum engagement and business impact. The aim is to craft a partner journey that is not only rich in immediate value but also evolves with the partners as they grow and their needs become more sophisticated.



Small-Scale Partner User Login Trends: Analysis and Findings

This section explores the login trends of Small-Scale partner users, examining the impact of the onboarding process on their engagement with the ZiftONE platform. Our analysis not only tracks login frequencies but also hypothesizes about the underlying strategies influencing these patterns.

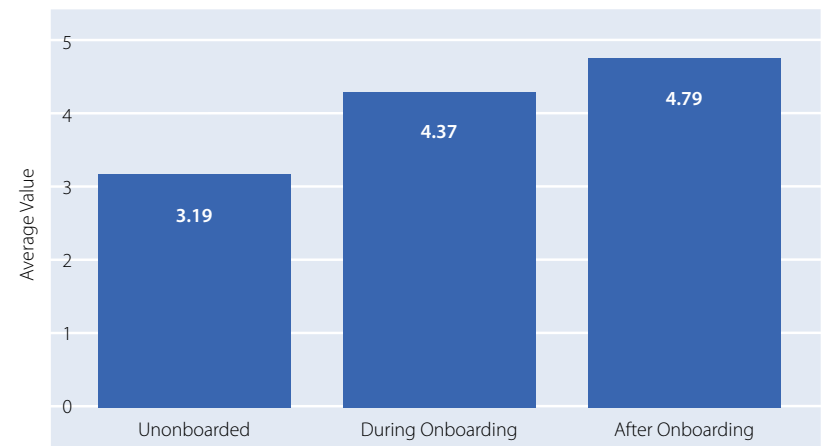
1. Pre-Onboarding Engagement: Setting the Stage for Discovery

Initial Exploration: For Small-Scale partner users, the journey on the ZiftONE platform begins with a login frequency of 3.19 times per month, a figure mirroring Large-Scale engagement levels. At this nascent stage, partners are dipping their toes into the digital environment of ZiftONE and vendor's partner program overall, acquainting themselves with the surface features, and scanning through vendor communications. This phase is about discovery, where partners assess how the program and platform align with their business objectives. The challenge here is to transform this exploratory behavior into consistent interaction. To achieve this, vendor could implement an initial engagement toolkit comprising targeted mini-tutorials, interactive walkthroughs, or early-stage checkpoints that provide immediate value and incentivize further exploration.

2. During Onboarding: Catalyzing Engagement Through Structured Learning

Engagement Escalation: As partners transition into the structured onboarding phase, login frequency increases to 4.37 times per month. This moderate yet

noteworthy uptick indicates that the scaffolding provided through onboarding is effective in escalating user interaction. The onboarding tasks at this stage could be a blend of guided learning, goal-oriented activities, and milestone achievements, carefully designed to be less overwhelming yet impactful enough to instigate deeper platform usage. Zift data and expertise would suggest that these tasks should be curated to align with the partners' business rhythms, thereby facilitating a seamless integration of the ZiftONE platform and vendor's various engagement strategies into their daily business processes.



Graph 3: Average Login Frequency for Unonboarded Users, Users during Onboarding, Users after Onboarding (Small-Scale)

3. Post-Onboarding: Fostering Engagement Sustainability

Maintaining Momentum: The climb in login frequency is gentle post-onboarding, peaking at 4.79 times per month. Compared to the threefold increase observed in Large-Scale, Small-Scale’s growth is more subdued, signaling potential areas for enhancement in the onboarding content or follow-up strategies. This data point could be indicative of an onboarding process that, while competent at introducing the program, may not fully succeed in demonstrating the ongoing value of regular engagement. Develop a post-onboarding strategy that not only reinforces the utility of the platform but also celebrates user achievements, perhaps through digital badges, user spotlights, or integration of advanced platform features that unlock new potentials for the business.

4. Unboarded Users: Spotlighting the Need for Pre-Onboarding Engagement

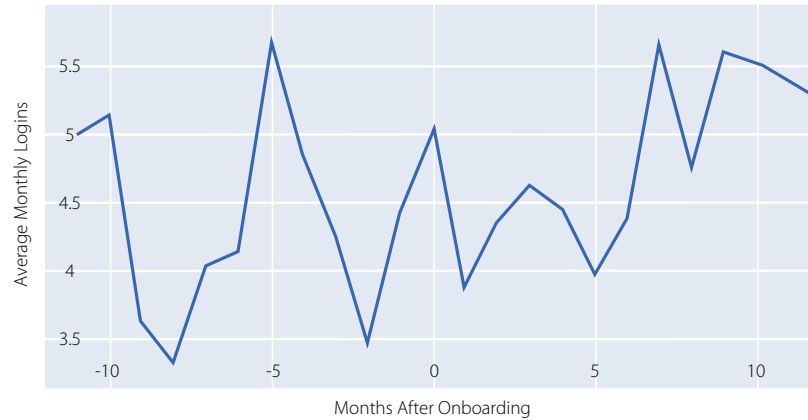
Consistent Yet Suboptimal Engagement: The engagement of unboarded Small-Scale users does not waver much, with login frequencies ranging between 2.6 and 3.9 times per month. This consistency, while stable, falls short of the interactive potential that vendor can offer. It opens up a conversation about the importance of creating an anticipatory buzz around the platform and program prior to formal onboarding. The introduction of community-driven challenges or peer-to-peer exchange sessions could serve as a prelude to onboarding, thereby elevating engagement rates even before the formal process begins.



Graph 4: Average Monthly Logins for Unboarded Users, September 2022–September 2023 (Small-Scale)

5. Post-Onboarding User Trends: Smoothing Out Engagement Fluctuations

Variable User Engagement: The post-onboarding phase for Small-Scale partners is characterized by engagement levels that ebb and flow, lacking the steady upward trajectory seen in Large-Scale. This oscillation suggests a disconnect between the onboarding experience and sustained platform use and program engagement. It calls for a strategic re-evaluation of how onboarding success is defined and measured. Are partners finding continued value in the platform and program? Is there a mismatch between programmatic offerings and partner expectations? Addressing these questions may require a data-driven approach to user feedback, regular engagement pulse checks, and perhaps an advisory council consisting of key partners to co-create a more resonant engagement journey.



Graph 5: Average Monthly Logins by Months after Onboarding (Small-Scale)

Strategic Recommendations per Phase for Small-Scale Clients

Pre-Onboarding Phase

Early Engagement Tools: Deploy interactive tools such as exploratory quizzes and platform simulations to pique interest and build familiarity with the platform’s value proposition.

Warm-up Communications: Initiate a series of warm-up communications that highlight key features and benefits of the platform and program, setting the stage for the onboarding process.

Social Proofing: Share success stories and testimonials from similar-tier partners to build credibility and demonstrate potential business outcomes.

Onboarding Phase

Tailored Onboarding Paths: Offer multiple onboarding pathways that cater to different partner profiles, allowing for a personalized onboarding experience per segment.

Milestone Celebrations: Recognize and celebrate the completion of key onboarding milestones to motivate partners and validate their progress.

Onboarding Support Groups: Facilitate the creation of peer support groups where partners can share experiences and learn collectively, fostering a sense of community.

Post-Onboarding Phase

Ongoing Educational Content: Provide a continuous stream of educational content that keeps partners informed about new and existing features, best practices, and industry trends.

Engagement Monitoring: Implement a system to monitor engagement levels and identify partners who may need additional support or motivation to fully utilize the platform.

Value Reinforcement Initiatives: Develop initiatives that consistently reinforce the value of the platform and program, such as spotlighting advanced use cases, hosting expert Q&A sessions, and offering strategic business insights.

For Unboarded Users

Engagement Incentives: Introduce incentives for users to start the onboarding process, such as exclusive access to certain features or content upon completion of initial tasks.

Direct Outreach: Conduct direct outreach to understand the barriers to onboarding and offer customized solutions to encourage their progression.

Addressing Post-Onboarding Fluctuations

Re-Engagement Campaigns: Design targeted re-engagement campaigns for users showing decreased activity, with personalized messages and offers that address their specific usage patterns.

Feedback Mechanisms: Establish regular and easy-to-use feedback mechanisms to gather insights and suggestions from partners, ensuring their voices are heard and acted upon.



Case Study: Effectiveness of Onboarding in a Specific Small-Scale Client

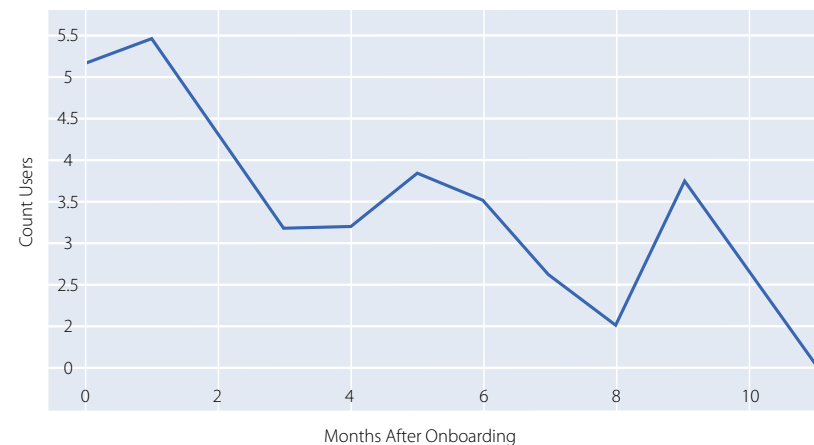
Context and Overview

This case study focuses on a specific Small-Tier client, which comprises 9621 partner users. Out of these, 1338 (13.9%) logged in between 2022 and 2023, and 231 (2.4%) were onboarded during this period. The aim is to assess the effectiveness of the client's onboarding process and its impact on user engagement.

Analysis of Login Trends Post-Onboarding

Initial High Engagement: Users showed a peak in login frequency, averaging 5 times in the month they completed their onboarding. This suggests an immediate engagement impact due to the onboarding process. However, the subsequent decrease in login frequency from the second month onward indicates a potential gap in sustaining long-term engagement.

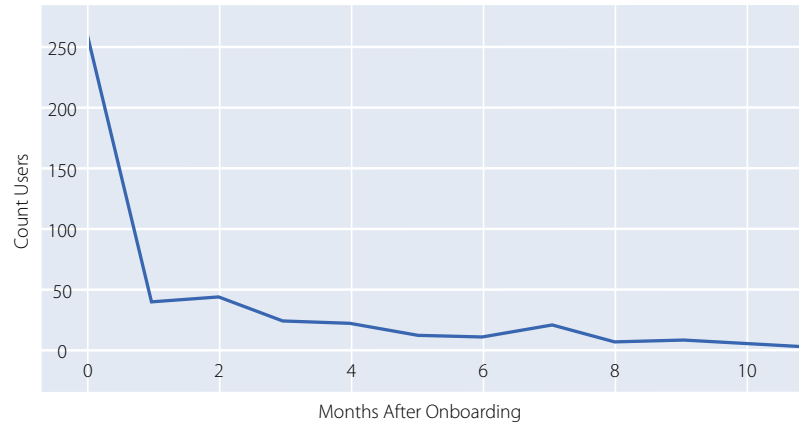
Comparison with Small-Scale Client Averages: Unlike the broader trend in Small-Scale Clients, where login frequencies stabilize post-onboarding, this client experiences a more pronounced drop. This divergence could point to unique aspects of their onboarding process, possibly lacking in continuous engagement hooks or follow-up strategies.



Graph 6: Average User Monthly Logins by Months after Onboarding (Case Study)

User Retention Post-Onboarding

Significant Drop in Active Users: The number of users logging in dropped by 85% in the first month post-onboarding, a more drastic decrease compared to other Small-Scale clients. This highlights a critical issue in user retention and suggests that while initial onboarding may be effective in driving short-term engagement, it fails to keep users engaged in the long term.



Graph 7: Count Users who Logged In by Months after Onboarding (Case Study)

Recommendations for the Case Study Client

- 1. Refining Onboarding Resources:** Enhance the onboarding process by incorporating more engaging and interactive resources. This could involve integrating real-life scenarios, interactive challenges, or continuous feedback mechanisms.
- 2. Post-Onboarding Engagement Strategies:** Develop a robust post-onboarding engagement plan. This could include regular updates, advanced tutorials, or community engagement activities to maintain user interest.
- 3. Feedback and Personalized Follow-Up:** Implement a system for gathering user feedback post-onboarding and use this data to offer personalized follow-up support. This approach could help identify and address specific user needs and preferences, potentially increasing long-term engagement.

Summary

The case study of the small-scale client using the ZiftONE platform reveals significant insights into the effectiveness of the client’s onboarding process and its subsequent impact on user engagement. Although the initial onboarding process appears to successfully foster a high level of immediate engagement, as evidenced by the average of 5 logins in the month following completion of onboarding, this effect is short-lived. The dramatic decrease in login frequency from the second month onwards, along with an 85% drop in active users post-onboarding, signals a profound challenge in sustaining long-term engagement. This trend starkly contrasts with the broader patterns observed in other Small-Scale Clients, where login frequencies tend to stabilize after onboarding.

The critical issue identified through this study is the client’s inability to maintain user interest beyond the initial onboarding phase. This suggests that while the onboarding process is effective in introducing users to the platform, it falls short in encouraging prolonged engagement. To address these challenges, Zift Solutions recommends refining the onboarding resources to make them more engaging and interactive, developing robust post-onboarding engagement strategies, and implementing a system for personalized follow-up based on user feedback. These strategies aim to not only enhance the immediate onboarding experience but also to foster a sustained engagement by continuously catering to the evolving needs and preferences of the users. The success of these recommendations will likely be reflected in improved long-term user retention and engagement metrics, crucial for the client’s ongoing success in leveraging the ZiftONE platform.

Conclusion

This report presents a comprehensive analysis of onboarding engagement among both Large-Scale and Small-Scale clients using the ZiftONE PRM platform. By examining partner login frequencies and engagement trends at different stages of the onboarding process, the report offers actionable insights and strategic recommendations for enhancing partner engagement.

Large-Scale Clients

- 1. Pre-Onboarding Phase:** Initially, Large-Scale clients show an average login frequency of over three times per month. This phase is crucial for setting engagement baselines and involves partners familiarizing themselves with the platform.
- 2. During Onboarding:** Engagement significantly increases to an average of 6.69 logins per month, attributed to interactive onboarding tasks and personalized tutorials.
- 3. Post-Onboarding:** Login frequency further increases to 9.3 times per month, indicating successful transition of users from passive observers to active participants. Strategies include regular content updates and continuous learning opportunities.
- 4. Unboarded Users:** These users show lower engagement levels, highlighting the need for pre-onboarding engagement strategies to boost early interaction.
- 5. Post-Onboarding User Activity:** Despite high login frequencies, there is a challenge in sustaining active users, with significant drop-offs observed post-onboarding.

Strategic Recommendations for Large-Scale Clients include interactive platform introductions, gamified onboarding experiences, post-onboarding engagement initiatives, personalized post-onboarding communication,

continuous learning and development programs, and proactive re-engagement campaigns.

Small-Scale Clients

- 1. Pre-Onboarding Engagement:** Small-Scale clients start with an average login frequency of 3.19 times per month, similar to Large-Scale clients. The focus is on initial exploration and discovery.
- 2. During Onboarding:** A moderate increase in login frequency to 4.37 times per month is observed, suggesting effective scaffolding provided through the onboarding process.
- 3. Post-Onboarding:** There is a gentle increase to 4.79 times per month, indicating areas for enhancement in onboarding content or follow-up strategies.
- 4. Unboarded Users:** These users demonstrate consistent yet suboptimal engagement, emphasizing the importance of pre-onboarding engagement.
- 5. Post-Onboarding User Trends:** Engagement levels fluctuate, indicating a need for a strategic re-evaluation of onboarding success and sustained platform use.

Strategic Recommendations for Small-Scale Clients include early engagement tools, tailored onboarding paths, ongoing educational content, engagement monitoring, value reinforcement initiatives, engagement incentives for unboarded users, and feedback mechanisms.

In summary, the report underscores the importance of tailored onboarding experiences, continuous engagement strategies, and personalized follow-ups to maintain and enhance partner engagement on the ZiftONE platform. By adopting these strategies, both Large-Scale and Small-Scale clients can achieve more effective and sustained engagement with their partners.

About

Zift Solutions

Founded in 2006, Zift Solutions is the only Partner Relationship Management (PRM) and Through-Channel Marketing Automation (TCMA) tool built as one to work as one. The company's ZiftONE platform manages the flow from onboarding to enablement, lead generation to marketing, all the way through sales. Backed by the most experienced team in the industry, Zift was named the only leader in both Channel Marketing Automation and Partner Relationship Management by Forrester Research and a market leader in Partner Management Software and Through-Channel Marketing Software by G2. For more information, visit www.ziftsolutions.com.

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“Zift Solutions provides a platform that is easy to learn and user-friendly. The content is well organized and readily available for creating campaigns and workflows.”

– Alie V.

