



# Partner Onboarding Insights

Part Two: Optimizing Partner Pathways

# Executive Summary

This report, “Partner Onboarding Insights Part Two: Optimizing Partner Pathways,” builds on the findings of its predecessor, “Lifecycle Engagement Strategies,” to provide a detailed analysis of partner onboarding tasks on the ZiftONE platform. The tasks are dissected along two dimensions — Means (how users interact with a task) and Topic (the thematic area of the task). This bifurcation enables a granular understanding of partner engagement and effectiveness in onboarding.



# Contents

## Executive Summary

### Key Findings

Means of Interaction

Topic of Tasks

Means and Topic Combinations

### Strategic Recommendations

### Definition of Terms

Means

Topic

### User Completion Rate by Task Means

Review Tasks: Dominating Through Depth

Action Tasks: Potential Untapped

Video Tasks: Visual Appeal Versus Engagement Reality

<b>2</b>	<b>User Completion Rate by Task Topic</b>	<b>8</b>
	Reports and Analytics: A Data-Driven Approach	8
<b>4</b>	Communication and Content Engagement: Identifying Opportunities	8
<b>4</b>	<b>User Completion Rate by Means and Topic Combinations</b>	<b>9</b>
<b>4</b>	Selective High Engagement: Niche Opportunities	9
<b>4</b>	Action-Oriented Tasks in Deal Registration and Communication	9
<b>5</b>	Video Content in Training: A Mixed Bag	9
<b>5</b>	<b>Strategic Insights and Recommendations</b>	<b>10</b>
<b>5</b>	<b>Conclusion</b>	<b>11</b>
	Key Takeaways:	11
<b>7</b>		
<b>7</b>		
<b>7</b>		

# Key Findings

## Means of Interaction

**Review Tasks:** With a 9.43% completion rate, these tasks lead in engagement. Partners prefer in-depth, knowledge-enriching tasks, suggesting a demand for intellectually stimulating and content-rich tasks.

**Action Tasks:** These show moderate engagement at 4.32%. There's a potential gap in aligning these tasks with partners' interests and immediate business goals. Improvement can be achieved by refining these tasks to offer tangible benefits.

**Video Tasks:** At a 3.52% completion rate, there's a disparity between the appeal of visual content and its actual effectiveness. Enhancement can be achieved by shortening videos, focusing on relevance, and adding interactive elements.

## Topic of Tasks

**Reports and Analytics:** High completion rate (30%) indicates a strong preference for data-driven tasks.

**Communications and Content Engagement:** Moderate completion rates suggest the need for more engaging and personalized content.

## Means and Topic Combinations

**Review Tasks in Social Media and Reports:** High completion rates in these areas show a preference for in-depth engagement.

**Action Tasks in Deal Registration and Communications:** Higher completion rates suggest partners favor direct and impactful tasks.

**Video Tasks in Training:** Effectiveness varies, indicating the need for context-specific video content.



# Strategic Recommendations

**Expand Review Tasks:** Integrate them with interactive elements to enhance their appeal and richness.

**Refine Action Tasks:** Align them more closely with partners' immediate business needs, potentially incorporating gamification or immediate rewards.

**Enhance Video Tasks:** Focus on the relevance and length of videos, integrating them with interactive quizzes or follow-up actions.

Overall, the report underscores the importance of aligning onboarding tasks with partner preferences and business objectives. By focusing on tasks that resonate with partners' needs, vendors can significantly boost engagement and productivity within the partner ecosystem. This nuanced understanding of partner engagement across different task types and topics provides actionable insights for vendors to refine their onboarding strategies for a more engaged and effective partner network.

## Definition of Terms

### Means

This dimension denotes how users interact with a task, categorized as follows:

**Action Tasks:** These require users to perform certain activities, such as clicking, sending information, or other hands-on interactions.

**Video Tasks:** These involve users watching videos or other visual content.

**Review Tasks:** These tasks require users to read through and understand documents, static web pages, or similar content.

### Topic

This dimension pertains to the thematic area to which an onboarding task belongs. Examples include:

**Content Management:** Tasks related to organizing, publishing, or managing digital content.

- "Browse collateral programs"
- "Browse content library"

**Portal Management:** Tasks concerning the tasks concerning the configuration and usage of the portal by the partner.

- "Update company profile"
- "Add a company admin"
- "Change supplier email notifications to 'on'"

**Social Media:** Tasks associated with managing or interacting with social media platforms.

- "Link your social media"
- "Create social posts"

**Leads:** Tasks related to leads and lead generation.

- “Configure lead management”
- “Register a lead”

**General:** Tasks providing an initial introduction or overview of programs, usually assigned at an early stage of the onboarding process.

- “Submit goals”
- “Review welcome materials”
- “Review program guide”

**Deals:** Tasks related to deals.

- “Register a deal”

**Communications:** Tasks related to establishing and maintaining communication with the supplier, including attending calls, meetings, and events.

- “Attend call”
- “Attend webinar”
- “Leave your feedback”

**Campaigns:** Tasks related to campaigns.

- “Activate campaign”

**Training:** Tasks related to training and certification programs.

- “Complete two certifications”

**Sales:** Tasks related to developing and applying sales skills.

- “Submit sales projections”
- “Pricing and pre-quoting”

**Other:** Other miscellaneous tasks.

- “Accept partner agreement”
- “Book student licenses”

This comprehensive analysis deeply explores the nuances of partner user task completion rates on the ZiftONE platform, dissecting these rates across both task interaction methods (Action, Video, Review) and topics. Leveraging our unique dataset spanning partner programs from large enterprises to emerging startups, we provide rich insights into the facets of partner engagement, outlining effective onboarding practices that not only engage partners but also drive revenue generation and active participation in key activities such as marketing and training.



# User Completion Rate by Task Means

## Review Tasks: Dominating Through Depth

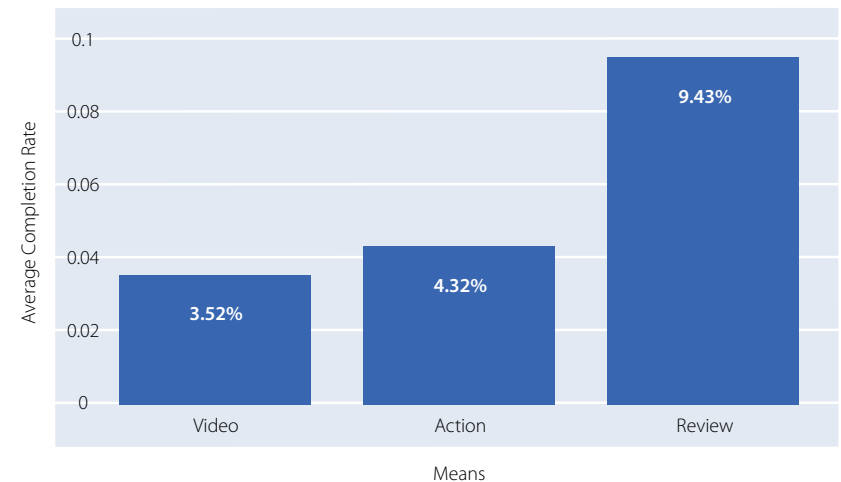
Review tasks, with a 9.43% completion rate, emerge as the clear frontrunners. This indicates a strong partner preference for tasks that require in-depth engagement, such as thorough document analysis or detailed web exploration. This preference points to a strategic opportunity: Tasks that demand intellectual investment and provide substantial knowledge tend to be valued and completed more frequently by partners. It suggests that partners are inclined towards tasks that not only inform but also enrich their understanding of the value proposition. Vendors should increase the frequency and complexity of review tasks, ensuring they are rich in content and insights. Additionally, integrating these tasks with interactive elements could further enhance their appeal and effectiveness.

## Action Tasks: Potential Untapped

With a completion rate of 4.32%, Action Tasks demonstrate moderate engagement. This reveals a gap in the current task design — While these tasks are interactive, they might not be fully aligned with partner interests or needs. An in-depth examination of the nature and context of these action tasks could unveil opportunities for improvement. For instance, tasks that offer tangible benefits or immediate application in the partners' business context may see higher completion rates. Refine action tasks to align more closely with partners' immediate business goals. Incorporating elements of gamification or immediate rewards might also increase their appeal and effectiveness.

## Video Tasks: Visual Appeal Versus Engagement Reality

Video tasks, with a 3.52% completion rate, suggest a discrepancy between the appeal of visual content and its effectiveness in driving task completion. This might indicate that while partners engage with visual content, it does not necessarily translate into task completion — often, this is the result of a disconnect between what vendors want to communicate and what partners want to receive. This could be due to a variety of factors, such as the length of videos, the relevance of content, or the lack of interactive elements. Enhance Video tasks by integrating them with interactive quizzes or follow-up action items. Shortening video length and focusing on the most relevant content can also increase completion rates.



**Graph 1:** Average User Completion Rate by Task Means (Action, Video, Review)

# User Completion Rate by Task Topic

According to Graph 1, on average, 30% of users complete tasks involving Reports and Analytics. 8.2% of users complete tasks related to Communications, and 7.51% for Content Engagement. While completion of Reports and Analytics tasks are higher at the user level, all other tasks display lower completion rates at the user level.

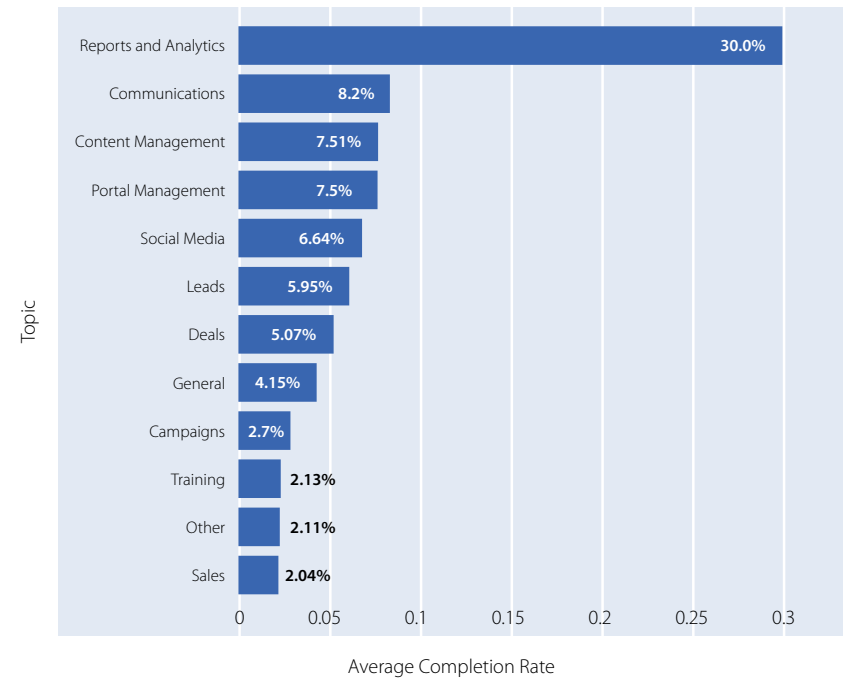
## Reports and Analytics: A Data-Driven Approach

**The high completion rate (30%) in Reports and Analytics tasks** indicates a strong partner interest in data and performance insights. This suggests that partners value tasks that provide clear, actionable data on their performance and the market. It highlights a trend towards a more analytical approach in partner engagement. Develop more tasks centered around data analysis and market insights. Providing partners with tools and tasks that help them understand their performance in real time can be a key driver for engagement.

## Communication and Content Engagement: Identifying Opportunities

**Moderate completion rates in communications (8.2%) and content engagement (7.51%) tasks** signify potential areas for improvement. This might indicate a need for more engaging communication strategies or more relevant and targeted content. The data suggests that while there is engagement, it may not be optimized to its full potential. Revamp

Communication and Content Management tasks to be more interactive and personalized. Using targeted content, tailored to the specific interests and needs of the partners, could significantly increase engagement.



**Graph 2: Average User Completion Rate by Task Topics**



# User Completion Rate by Means and Topic Combinations

Our analysis indicates that the effectiveness of task delivery methods varies significantly depending on both the means of the task and its thematic area. Review tasks, especially in areas like Social Media and Reports and Analytics, exhibit the highest completion rates, suggesting that tasks requiring in-depth engagement are more favorably received by users. However, this trend is nuanced, as in certain topics such as Deal Registration and Communications, Action tasks achieve higher completion rates, indicating a preference for more direct and interactive tasks in these areas. This variance highlights the importance of tailoring task types to their respective topics to optimize user engagement.

While Review and Action tasks are commonly utilized across various topics, Video tasks are selectively effective, primarily in Training and General categories. These insights offer a glimpse into the diverse preferences and engagement patterns of users, providing a foundation for discussing the detailed data and formulating targeted strategies for task design and implementation.

## Selective High Engagement: Niche Opportunities

**The highest completion rate observed in Social Media: Review (60%) tasks**, albeit representing a single task, unveils an important insight: Niche tasks that align closely with partners' interests and needs can achieve significantly high engagement. This points to the potential of developing more specialized tasks that cater to specific aspects of a partner's business or interest. Investigate other niche areas where partners might show similar levels of engagement. Expanding the variety of tasks in these areas could lead to higher overall completion rates.

## Action-Oriented Tasks in Deal Registration and Communication

**The higher completion rates for Action tasks in Deal Registration (5.56%) and Communications (8.93%)** suggest that partners are more inclined to complete tasks that have a direct and immediate impact on their business dealings. This indicates that partners prioritize tasks that are not only practical but also have a clear benefit to their business. Focus on developing more Action tasks in the Deal Registration and Communications categories. Ensure these tasks are straightforward and have a direct impact on the partners' business operations.

## Video Content in Training: A Mixed Bag

**The effectiveness of video tasks in Training (7.4%)** indicates a preference for visual learning methods in specific areas. However, this effectiveness is not uniform across all topics, suggesting that the context in which video is used plays a significant role in its success. Leverage video content more effectively in training modules. Consider the context and content of these videos to ensure they are engaging and relevant to the partners' training needs.

# Strategic Insights and Recommendations

**Review Tasks:** Expand the scope and depth of review tasks. Consider integrating these with practical, hands-on activities to provide a more comprehensive learning experience.

**Action Tasks:** Align action tasks more closely with partners' immediate business needs. Explore the use of gamification or immediate rewards to increase engagement.

**Video Tasks:** Enhance the interactivity of video tasks. Consider the relevance and length of video content to ensure it aligns with partners' preferences and learning styles.

Our analysis reveals a nuanced understanding of partner engagement across various task types and topics. By focusing on tasks that not only inform but also resonate with partners' business needs and preferences, vendors can significantly enhance partner engagement. This exploration of the data provides actionable insights that vendors can leverage to refine their onboarding strategies, aligning them with partner preferences and business goals for a more engaged and productive partner ecosystem.



# Conclusion

The insights gathered from the “Partner Onboarding Insights Part Two: Optimizing Partner Pathways” report offer a comprehensive understanding of the dynamics involved in partner onboarding on the ZiftONE platform. The categorization of tasks along the dimensions of means and topic has allowed for a nuanced analysis of partner engagement and effectiveness in onboarding strategies.

## Key Takeaways:

- 1. Diverse Engagement Preferences:** The analysis highlights that partner engagement varies significantly across different types of tasks. This variation underscores the importance of a diverse onboarding strategy that caters to various preferences and learning styles.
- 2. Importance of In-Depth Engagement:** Review tasks, particularly those involving social media and reports and analytics, have shown high completion rates. This suggests that tasks which require intellectual investment and provide substantial knowledge are highly valued by partners.
- 3. Action and Video Tasks:** While action tasks indicate moderate engagement, there is room for improvement by aligning them more closely with partners’ immediate business goals. Video tasks, though less effective overall, can be optimized for specific areas like training by focusing on relevance and interactivity.
- 4. Strategic Opportunities in Task Design:** The report identifies significant opportunities for enhancing partner onboarding through strategic task design. This includes expanding the scope and depth of review tasks, refining action tasks to be more aligned with business needs, and enhancing the appeal and effectiveness of video tasks.
- 5. Tailored Approach for Increased Engagement:** The findings suggest that a tailored approach, which considers the unique preferences and business contexts of partners, is crucial. This approach should aim to deliver a mix of intellectually stimulating, practical, and visually engaging tasks.
- 6. Leverage Data-Driven Insights:** High completion rates in reports and analytics tasks indicate a strong preference for data-driven insights. Capitalizing on this trend by developing more tasks centered around data analysis and market insights can significantly boost engagement.

In summary, the report emphasizes the need for a multifaceted and flexible onboarding strategy that respects the diverse needs and preferences of partners. By tailoring tasks to these needs and continuously refining the onboarding process based on partner feedback and performance data, vendors can enhance partner engagement, thereby driving more effective and productive collaborations within the partner ecosystem.

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](http://www.ziftsolutions.com).

## Ready to Take Your Partner Program and Your Channel Marketing to the Next Level?

**Contact a Zift Solutions Specialist Today!**

[marketing@ziftsolutions.com](mailto:marketing@ziftsolutions.com)

[ziftsolutions.com/get-a-demo](http://ziftsolutions.com/get-a-demo)

“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.

