



Customer CRM to ZINFI UPM Integration

Lead Management Best Practices

Ext.prc.002.06 | 08.16.2024

UPM 24.x



The Usual B-to-B Scenario

The well-trodden path to dysfunction and despair

An abstract geometric pattern composed of various shades of blue and grey triangles, some pointing up and some pointing down, arranged in a complex, overlapping fashion on the right side of the slide.

The Usual B-to-B Scenario



Lead Management Challenges in the Channel

Low Partner Satisfaction



Partners have no faith in lead quality

Unclear Distribution Policies



Unclear who should receive a lead

Inadequate Processes/Technology



Leads are distributed to partners manually

Lack of Visibility



Difficult to find out what partners do with the leads

Lack of Partner Urgency



Partners do not respond to leads in a timely fashion

6 Ps of End to End Channel Lead Management

Leveraging Partner Relationship Management (PRM) Automation



Key Strategic Items ...

1. Define a vision and governance processes to improve visibility
2. Better cross-functional alignment between sales & marketing
3. Baseline current performance and identify key revenue drivers
4. Criteria for capturing, tracking and measuring partner performance
5. Mitigate risks manage via SLAs and lead acceptance criteria



Now I will show you how to drive this tactically ...

1. **Policies**: Partner Profiles & Access Rights
2. **Platform**: Supplier Led & Partner Led
3. **Process**: Lead Distribution & Management
4. **People**: Concierge Services
5. **Programs**: Marketing & Sales Incentives
6. **Performance**: Tracking, Measuring & Rewarding

Access Rights by Groups

Partner medallion status



Industry vertical



Partner users

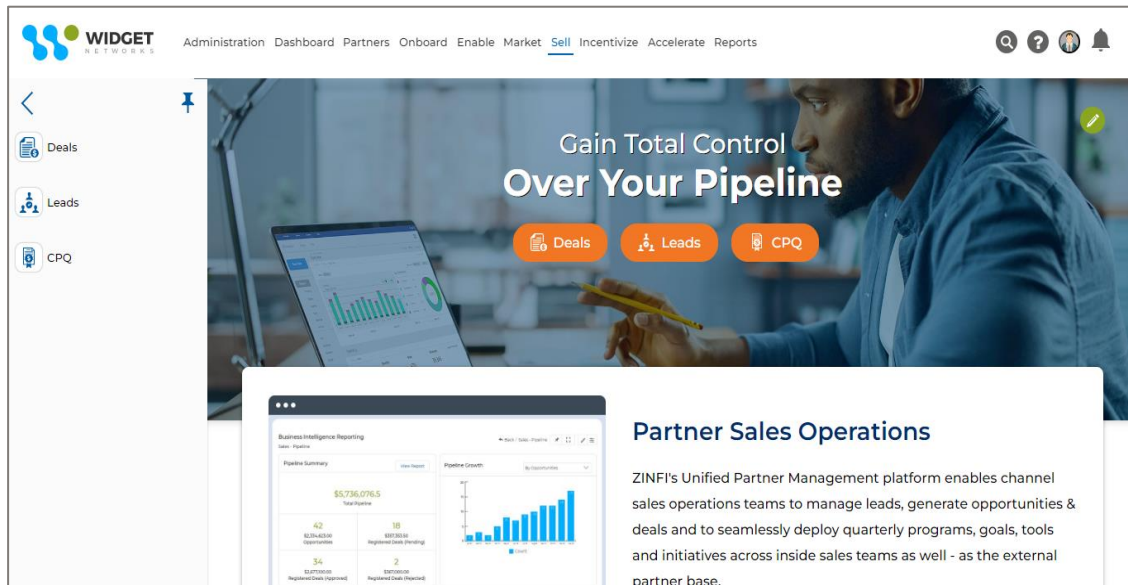


Varied Rules

- Admin = accepts & distributes
- Marketing = nurtures
- Sales = qualifies & registers

Time Based Events

- SMB < 7 Days
- Mid-Market < 90 days
- Enterprise < 180 days



Contact to Close

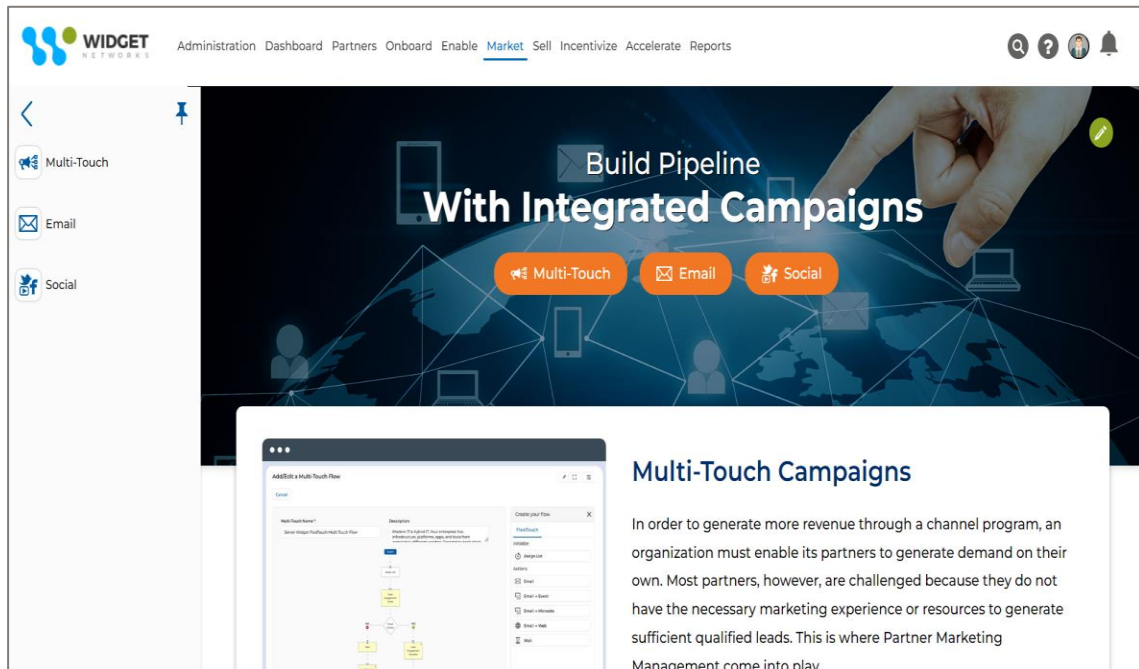
- Distribute based on factors
 - *Competencies*
 - *Verticals*
 - *Sizes, etc.*
- Separate lead by maturity

Management

- Allocate
- Notify/Alert
- Reallocate

Measure

- % Partner Adopting
- % Conversion by Stages
- Pipeline Built by Segment
- Etc.



List Management

- Partners to upload lists
- Confidential and secure
- Contact to Close (stage management)

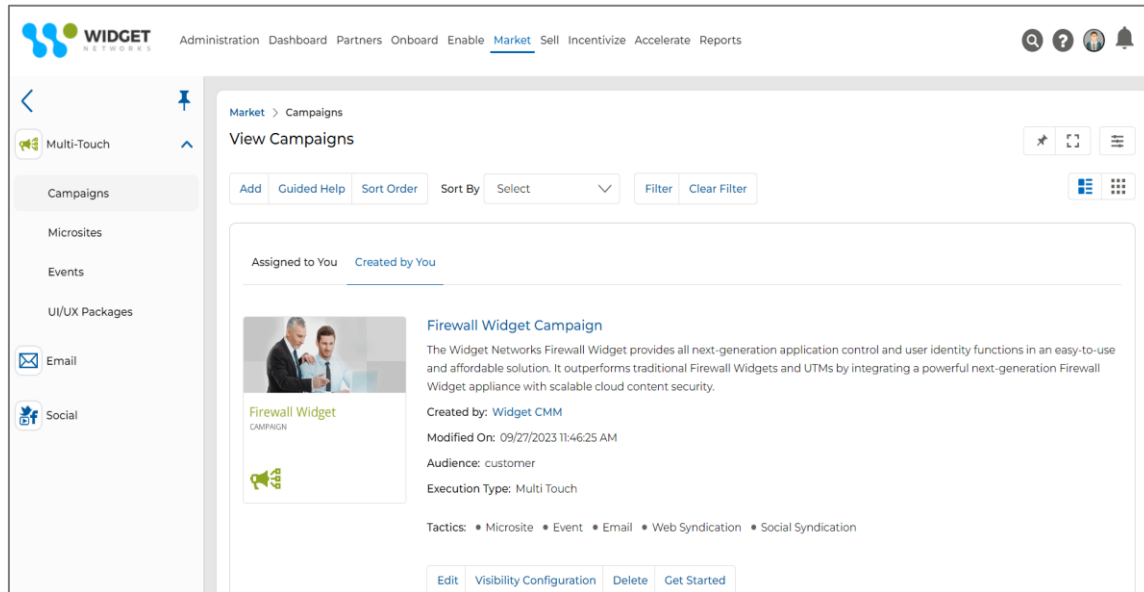
Campaign Management

- Multi-touch Campaigns
- Co-branded Asset Sharing
- Dynamic Lead Alerts

Performance Management

- Campaign Performance
- Partner Performance
- Pipeline Development

Pre Packaged Campaigns



Campaigns In A Box

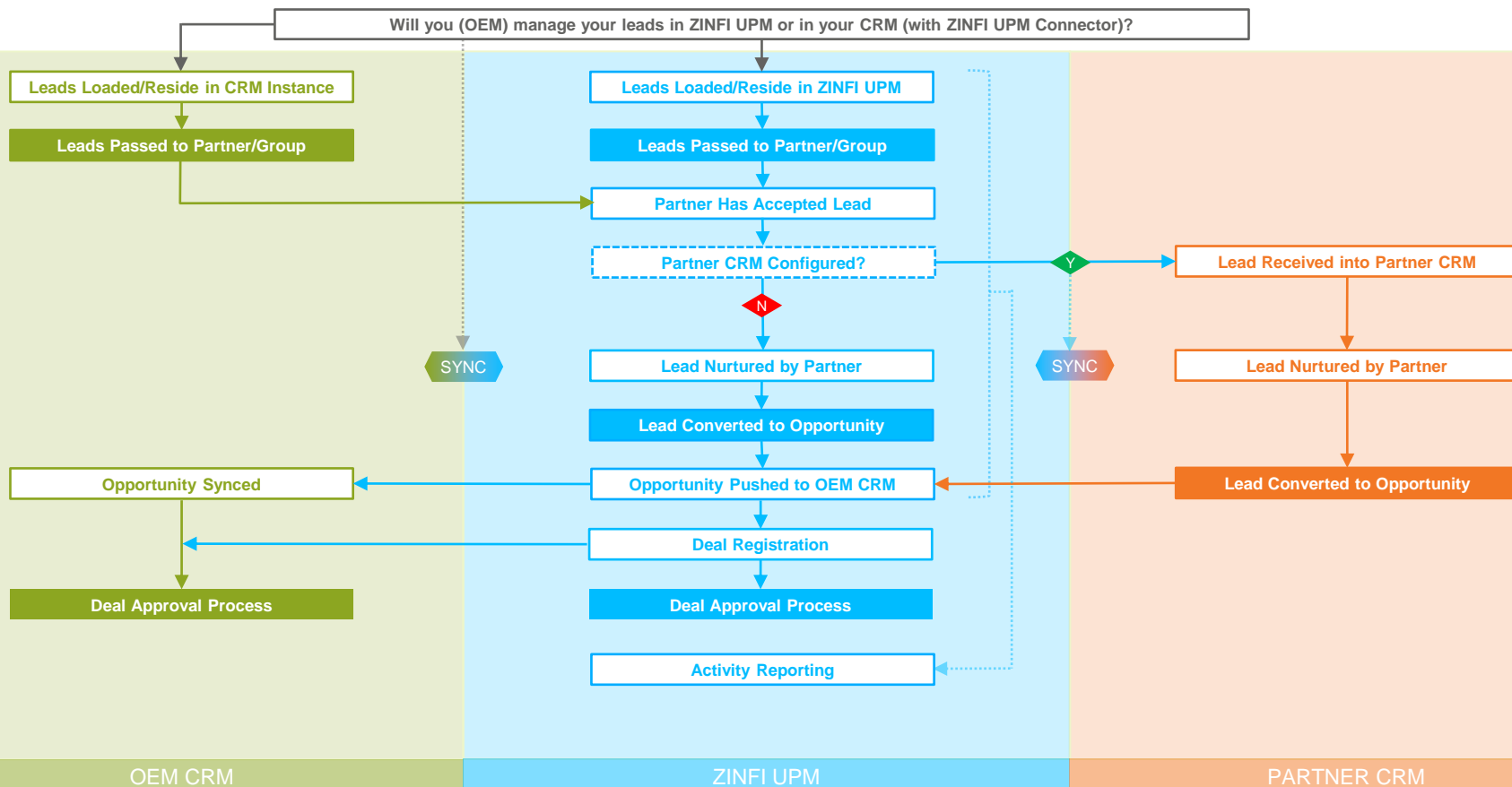
- Single-Tactic (SMB)
- Multi-Tactic (Mid-Market/Enterprise)
- Co-brandable

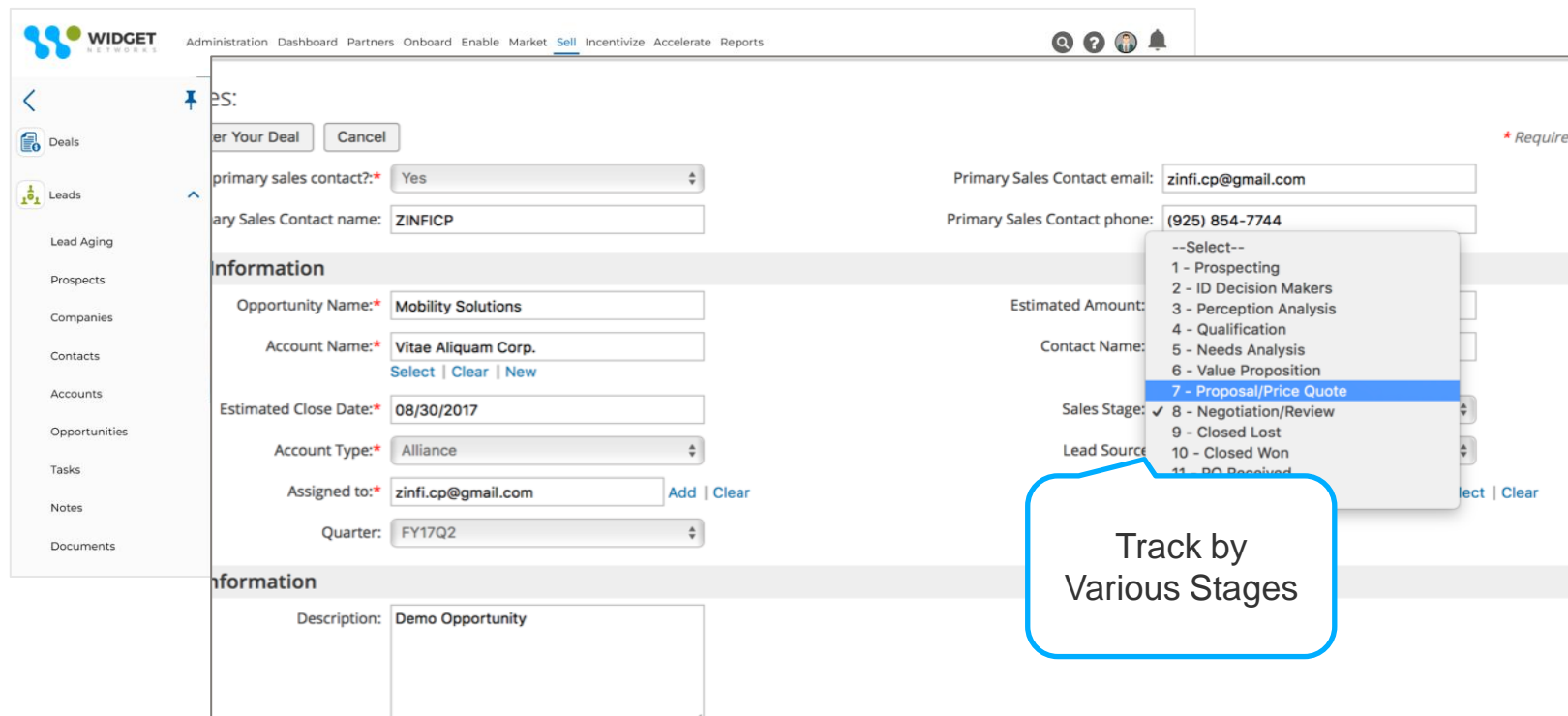
Group Based Access

- Language & Group Filter
- Time Based Expiration

Marketing Services

- Concierge Services
- Country Based Services
- MDF & Incentives Policies





WIDGET NETWORKS

Administration Dashboard Partners Onboard Enable Market **Sell** Incentivize Accelerate Reports

ES:

Create Your Deal Cancel

primary sales contact?:* Yes

Primary Sales Contact email: zinfi.cp@gmail.com

Primary Sales Contact name: ZINFICP

Primary Sales Contact phone: (925) 854-7744

Information

Opportunity Name:* Mobility Solutions

Account Name:* Vitae Aliquam Corp.
Select | Clear | New

Estimated Close Date:* 08/30/2017

Account Type:* Alliance

Assigned to:* zinfi.cp@gmail.com Add | Clear

Quarter: FY17Q2

Estimated Amount:

Contact Name:

Sales Stage: 7 - Proposal/Price Quote

Lead Source:

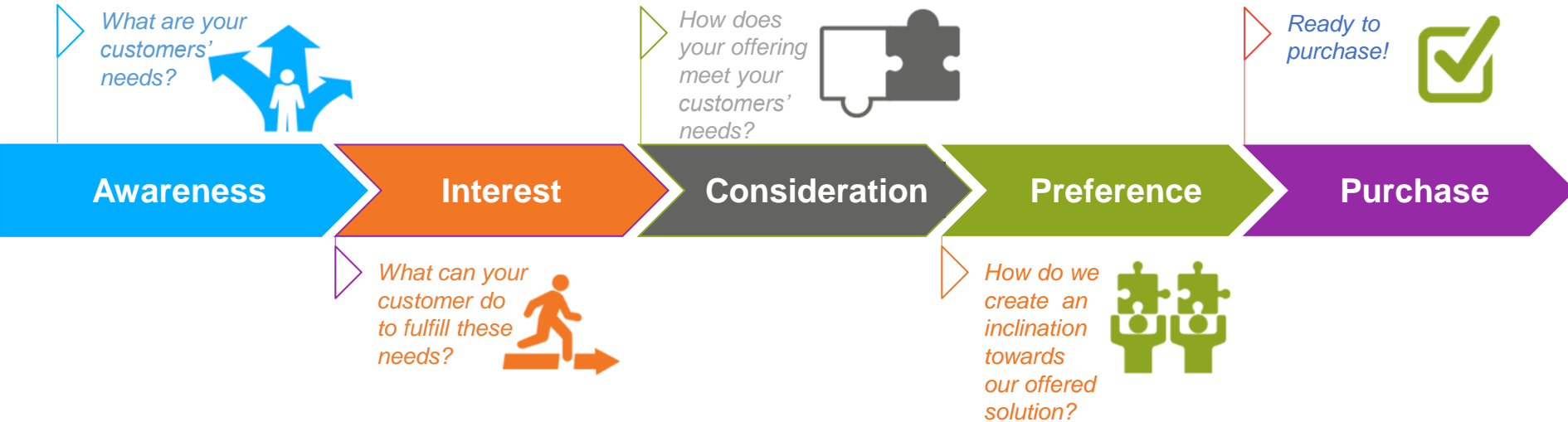
Description: Demo Opportunity

Track by Various Stages

Two Primary Types – Open Accounts (Shark Tank) or Named Accounts

Teaching Partners The Buyers Journey

Marketers seek those touch points when consumers are open to influence. In today's highly digitized world, the traditional funnel method fails to capture all the touch points and key buying factors that result from the explosion of product choices, digital and social media channels, coupled with the emergence of an increasingly discerning, well-informed consumer.



Level 1

Inbound Support

- Predefined scope to provide support to partners related to portal support, **lead management program details**, MDF details, training, etc.
- Discuss relevant marketing and sales tools to nurture prospects and grow pipeline
- Enable partners to run multi-touch campaigns by using pre-packaged campaign content

Level 2

Outbound Support

- Localized marketing concierge performed on behalf of the vendor to partners – Market To
- Includes outbound active engagement via group webinars, training, etc., to drive strategic program adoption
- Includes also one-on-one coaching sessions post group onboarding and training sessions to drive adoption
- Typically provided to a focused list of top and mid-tier partners with finite goals and objectives

Level 3

Campaign Packages

- Marketing concierge performed to end-user-prospects on behalf of the partners – Market Through
- Predefined single or multi-tactic campaigns with pre-loaded content
- Deployed typically for top and mid-tier partners, but can be made available to others

Level 4

Custom Programs

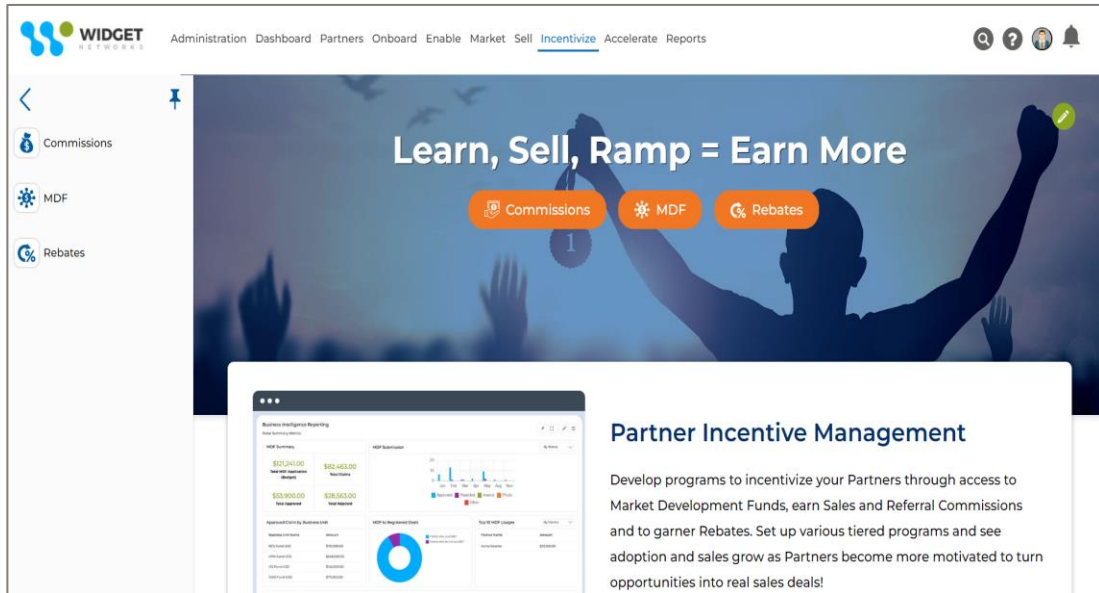
- Fully a la carte creative and marketing services with pre-approved rate cards
- Deployed for Top-tier partners only with available MDF
- ZINFI concierge drives end to end execution once program scope defined and funded by the vendor or partner

For top strategic partners

Focus on demand generation primarily pre-funded or MDF funded

Deployed to a focused set of partners to drive adoption of campaigns, promotions, incentives, training, etc.

Can be made available to the entire partner base to provide more bandwidth to existing channel teams



Company Rewards

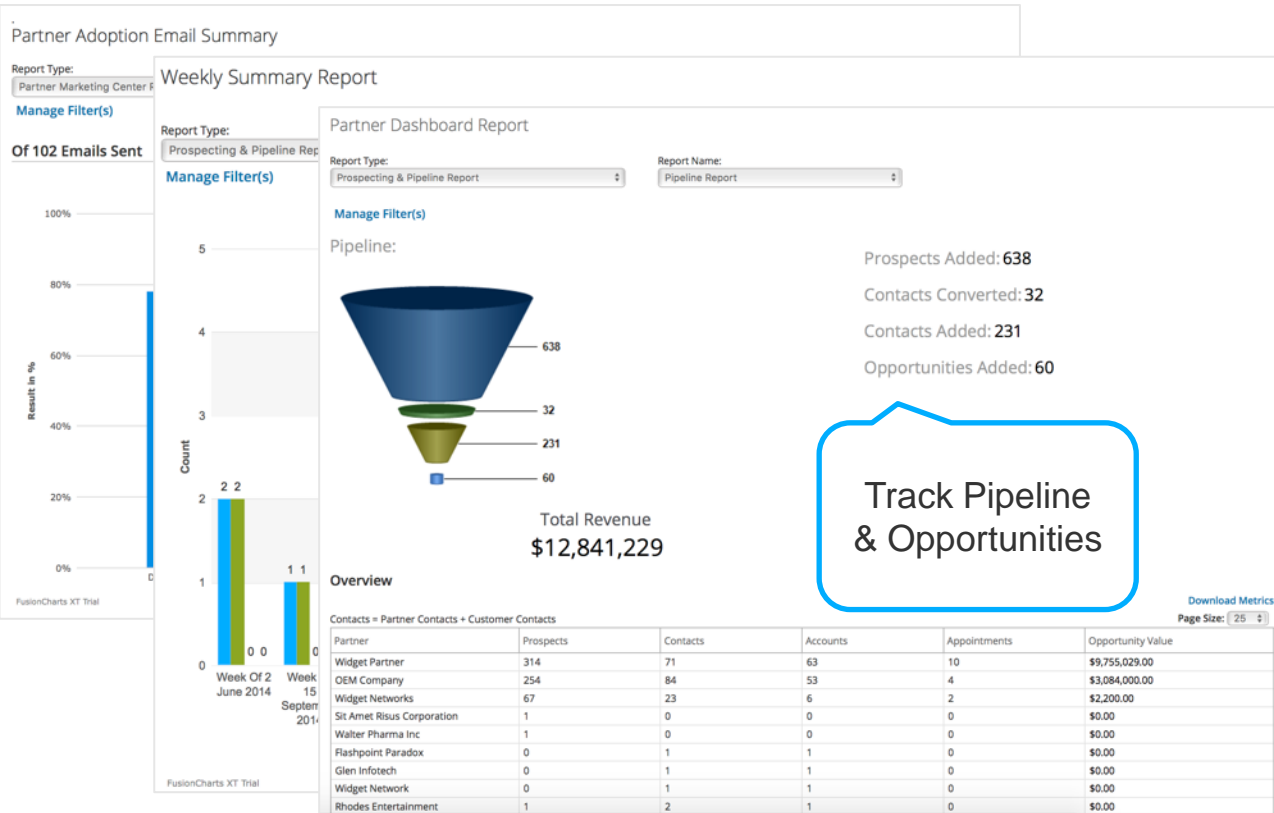
- Special Rebates
- Referral & Commissions
- Market Development Funds

Personnel Rewards

- Technical Excellence
- Marketing Excellence
- Sales Excellence

Dynamic Reports & Alerts

- Leaderboards
- Accelerators



Engagement Report

- Partner Adoption
- Program Effectiveness
- Success Hot Spots

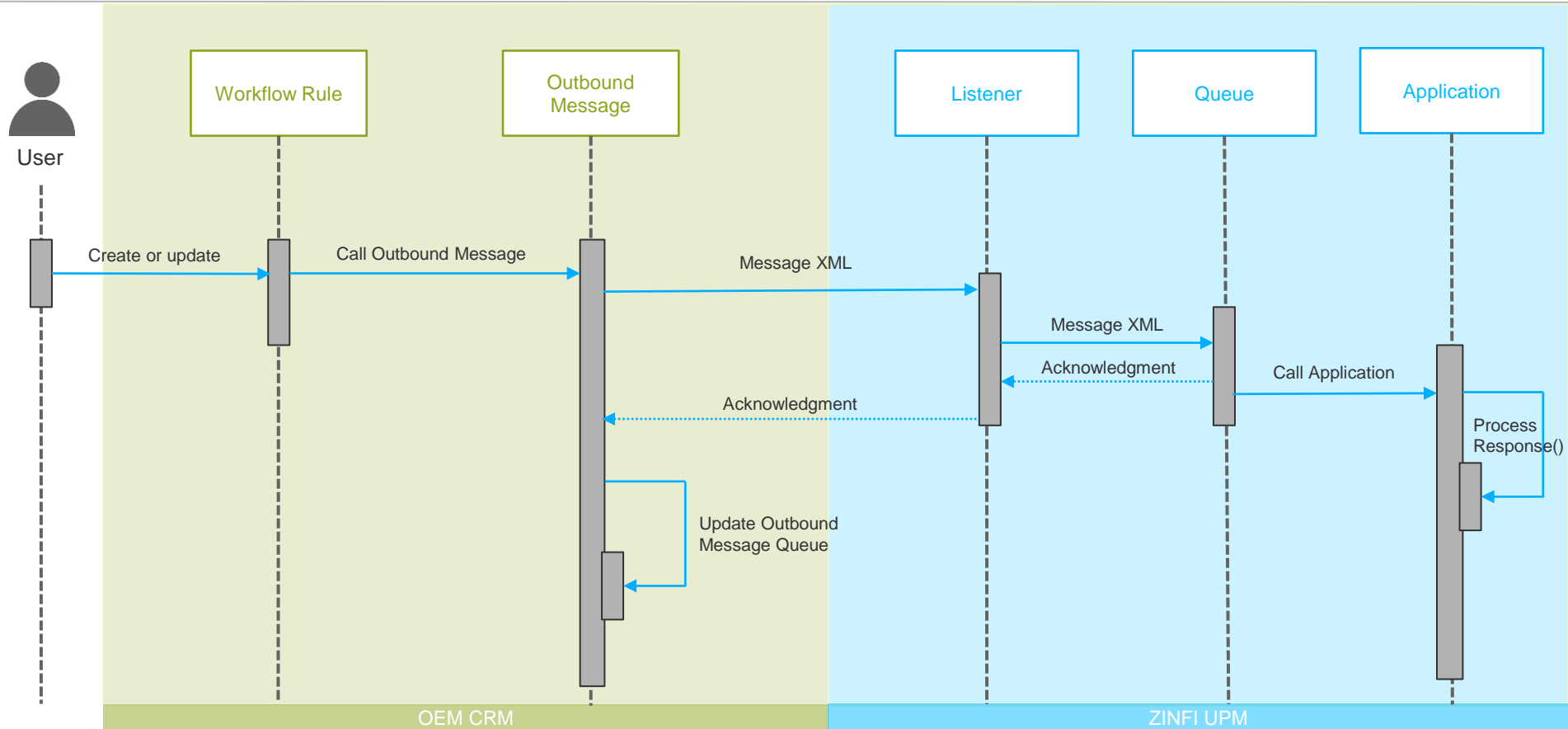
Performance Report

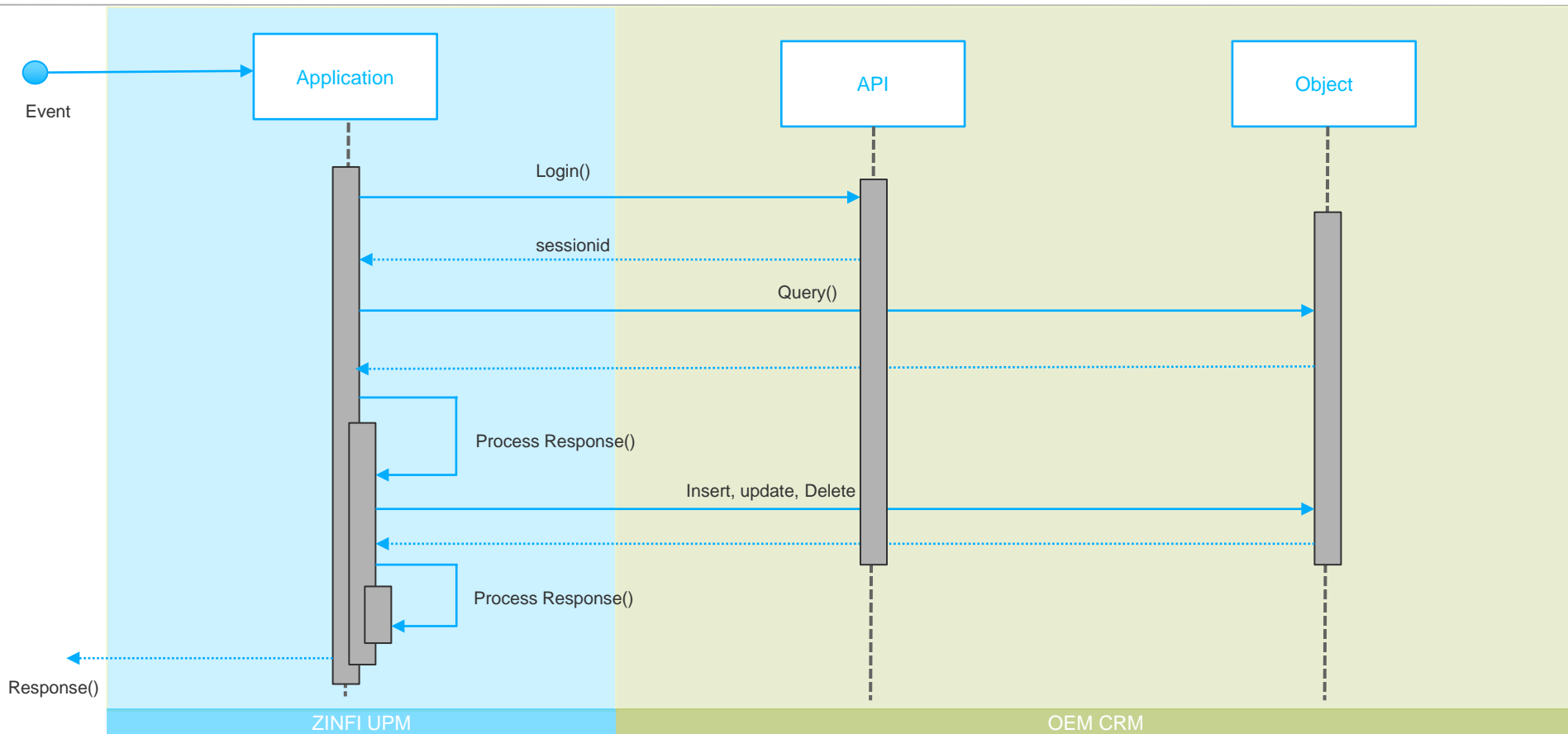
- Lead Gen Report
- Opportunity Report
- Deal Reg & Pipeline Report

Custom Report

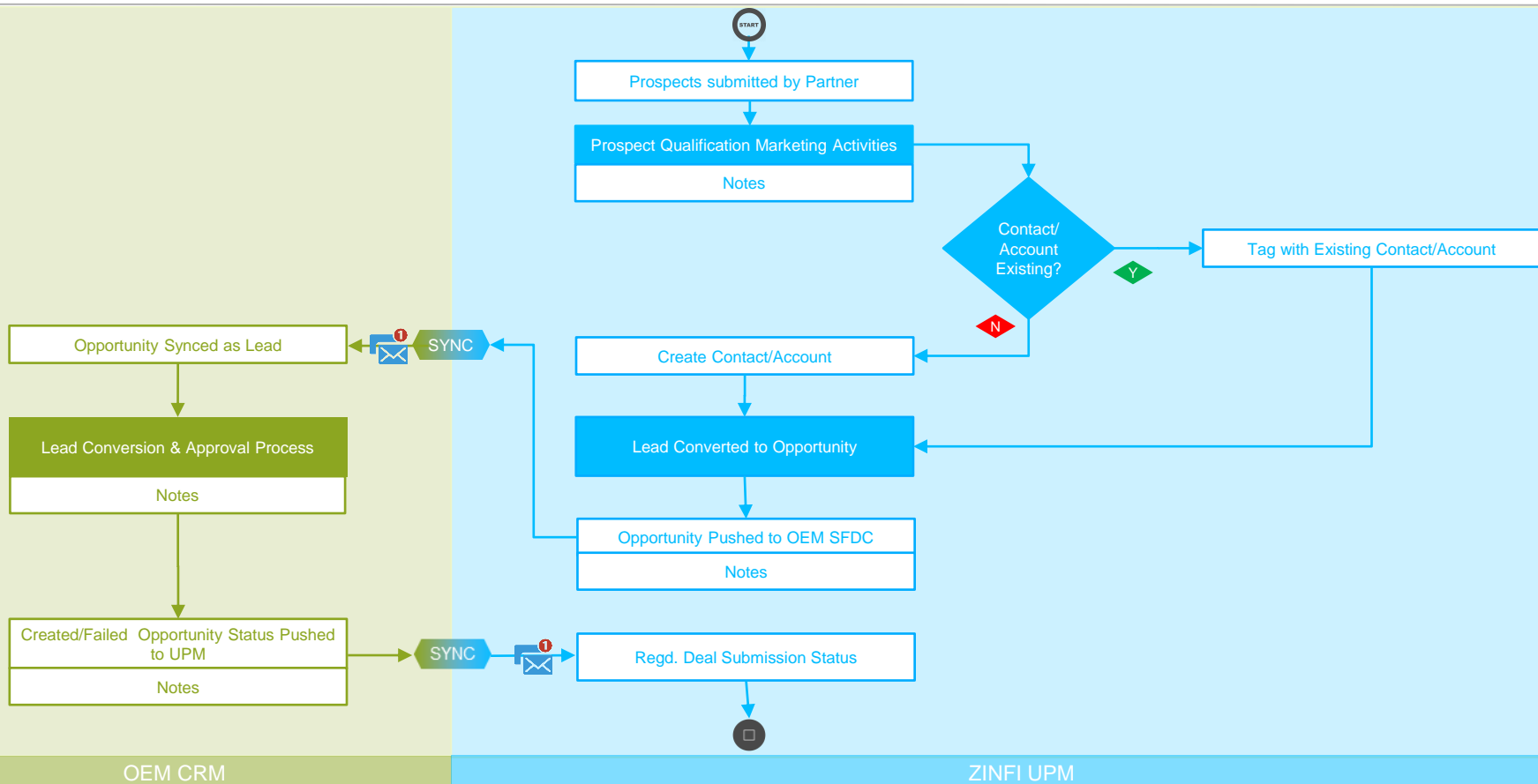
- Dynamic Capability
- Top Down Drill Down
- Automated Report Delivery

Customer CRM to ZINFI UPM Integration





Lead Management Flow Best Practices



Activities Performed

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

Mapped Modules

UPM	CRM
Opportunity	Leads
Accounts	Accounts
Contacts	Contacts
Notes	Notes
Registered Deals	Opportunity

Basic

1. **Sync Direction**
 - Uni-directional sync (CRM overwrites UPM)
2. **Field Mapping**
 - Entire UPM form syncs with CRM
3. **Access Rights**
 - Partner access UPM
 - Admin access CRM
 - CAM access CRM (occasional)
4. **Email Alerts**
 - For approvals, status etc based on defined rules
5. **Mobile App**
 - Replicates Desktop version rule set

Advanced

1. **Sync Direction**
 - Bi-directional sync (both systems can overwrite based on last modified time stamp)
2. **Field Mapping**
 - Selective Fields from UPM to CRM
3. **Access Rights**
 - Partner access UPM and Partner CRM (occasional)
 - Admin access both with primary access set based on changes to be made
4. **Email Alerts**
 - For approvals, status etc based on defined rules
5. **Mobile App**
 - Selective rule setup from the desktop version

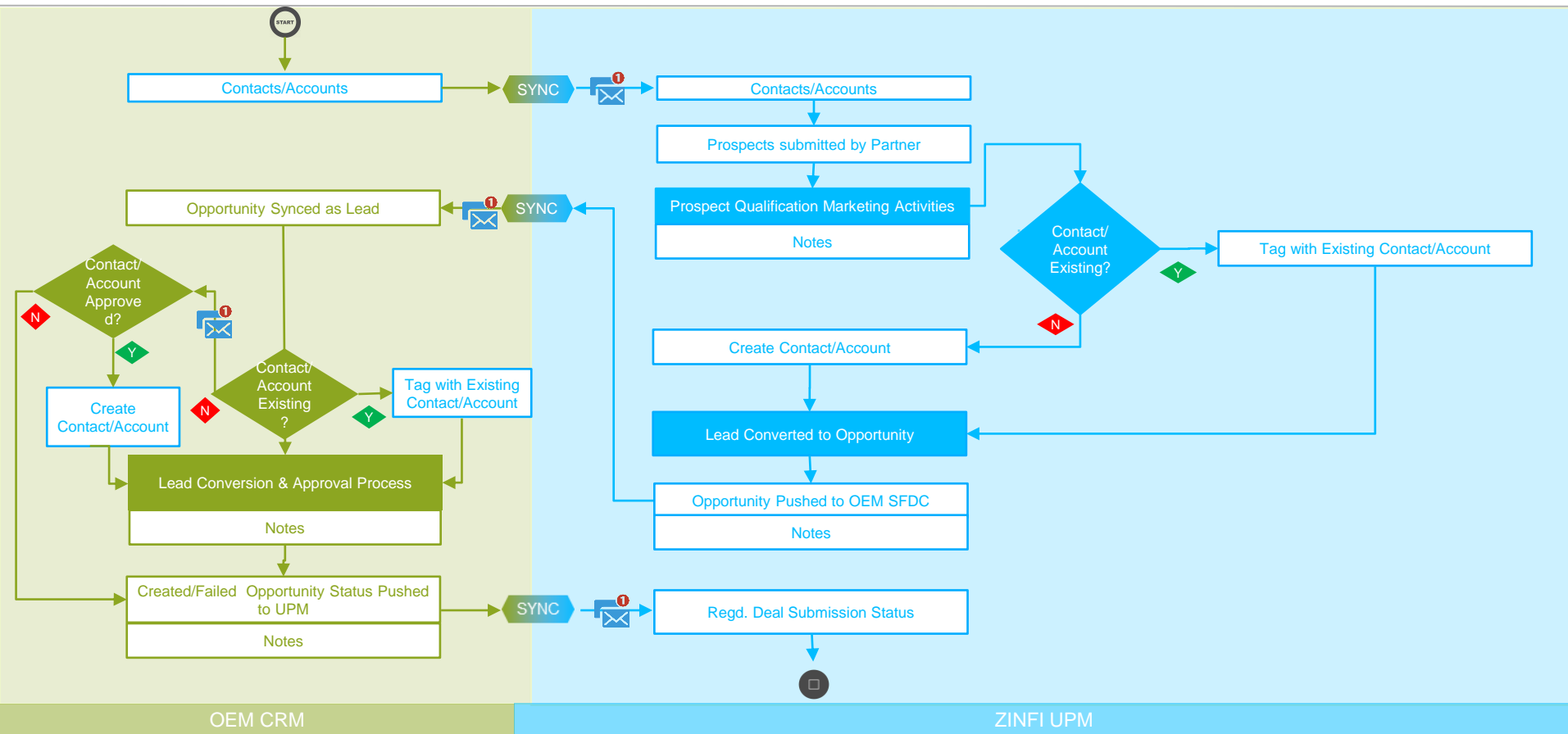
Complete

1. **Sync Direction**
 - Uni-directional sync (CRM overwrites UPM)
2. **Field Mapping**
 - Selective Fields from UPM to CRM
3. **Lead Distribution**
 - Lead assignment from CRM to UPM as Named or Open Accounts
4. **Access Rights**
 - Partner access UPM and Partner CRM (occasional)
 - Admin access both with primary access set based on changes to be made
5. **Email Alerts**
 - For approvals, status etc based on defined rules
6. **Mobile App**
 - Selective rule setup from the desktop version

Channel Maturity

Work Flow Use Case 1

New Account Addition & Approval



Activities Performed

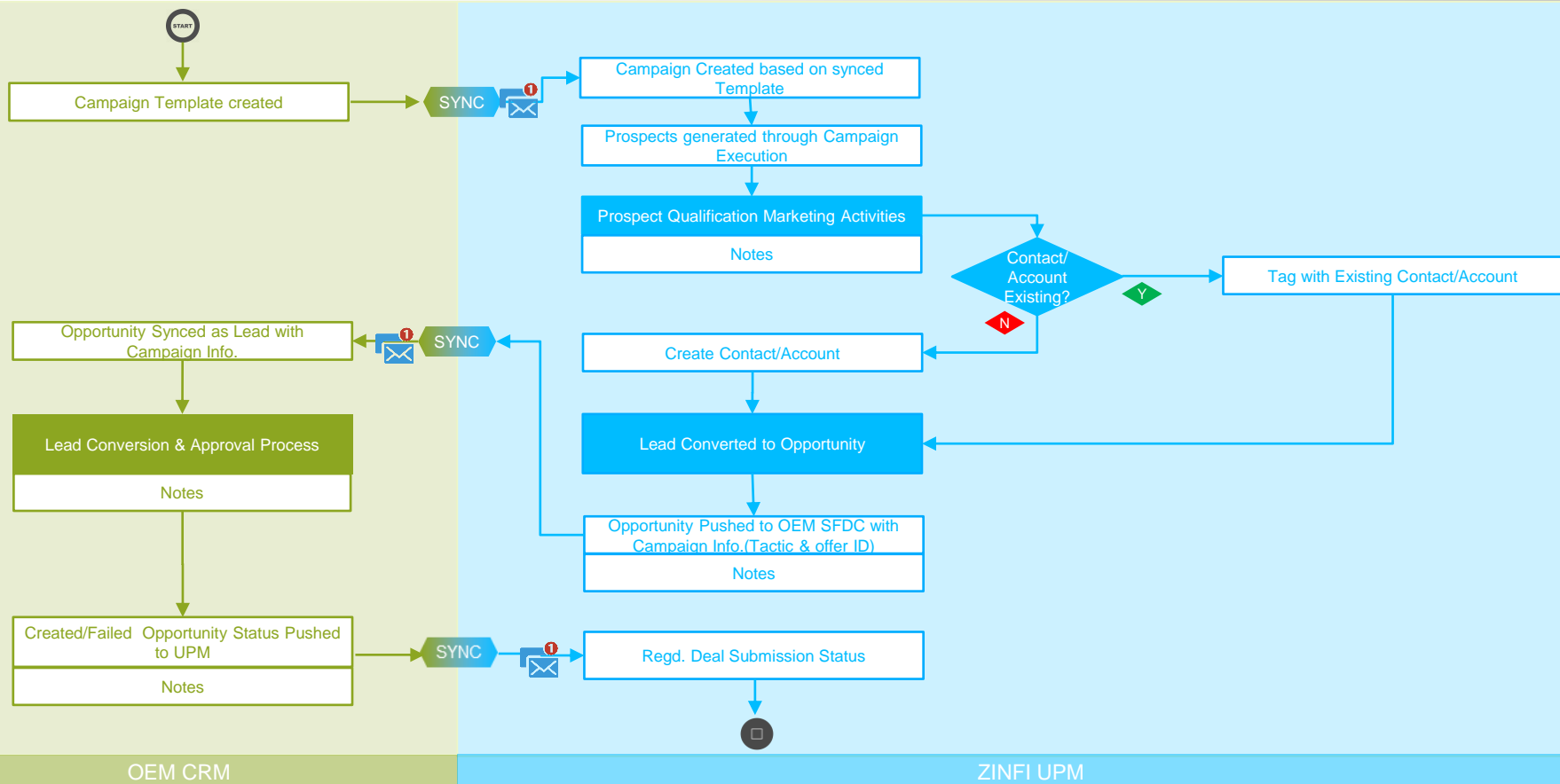
1. Automated Process – Initial sync of CRM & UPM Account Database
2. Partner – New account creation in UPM
3. Automated Process – New UPM account auto syncs in CRM for approval
4. CRM Admin – Initiates Account approval process in CRM
5. Automated Process – Approved account in CRM gets activated in UPM
6. Partner – Opportunity submission in UPM with the approved account

Mapped Modules

UPM	CRM
Accounts	Accounts
Notes	Notes

Work Flow Use Case 2

Campaign Tagging with Offer & Tactic ID



Activities Performed

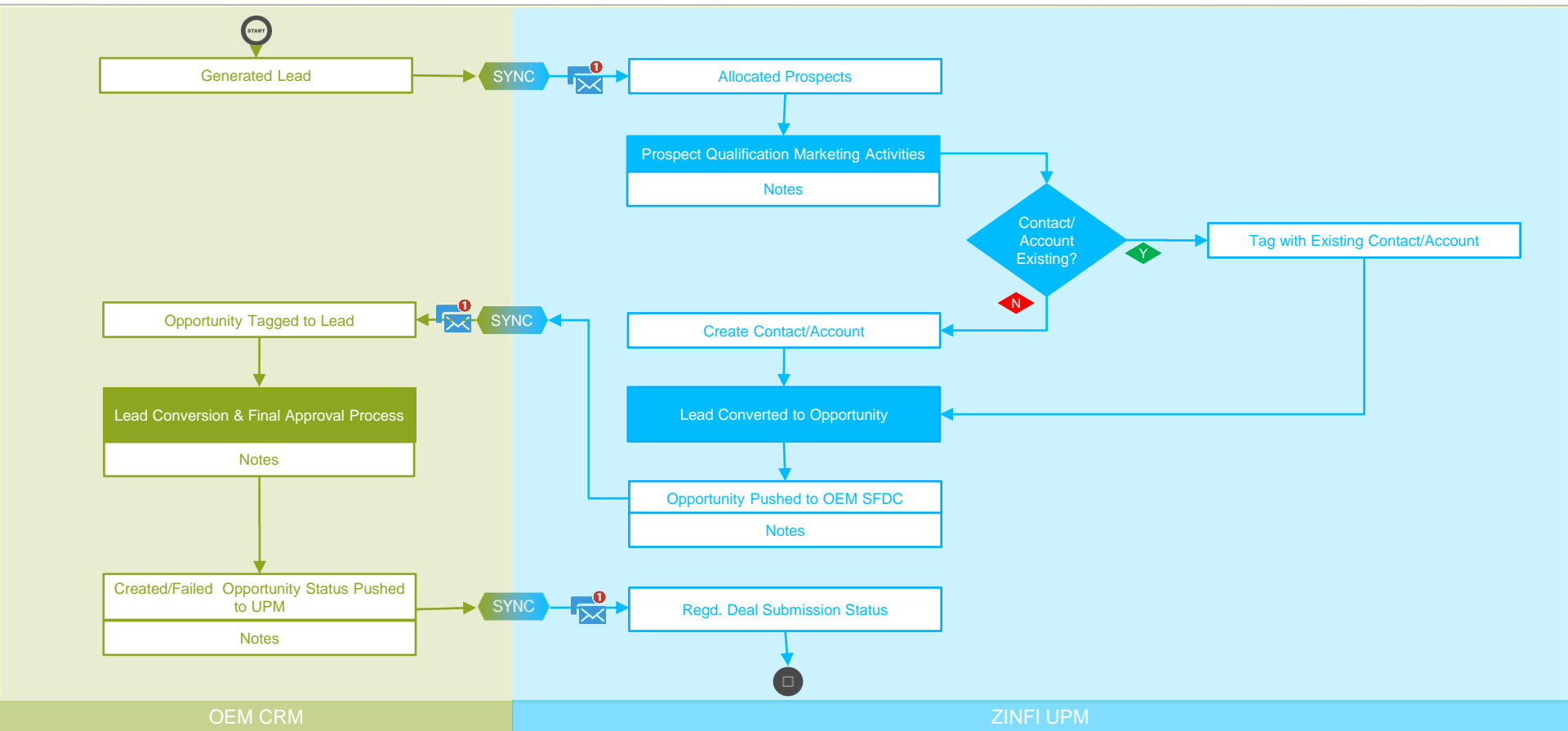
1. Automated Process – CRM Campaign ID sync with UPM Campaign
2. Partner – Campaign Launch & Execution in UPM
3. Partner – Lead nurturing process initiated tagged with Campaign ID, Offer ID and Tactic ID
4. Partner – Opportunity submission in UPM with all tags
5. Automated Process – UPM Opportunity syncing in CRM with all available tags

Mapped Modules

UPM	CRM
Campaign	Campaign
Opportunity	Lead

Work Flow Use Case 3

Lead Assignment to Partner



Activities Performed

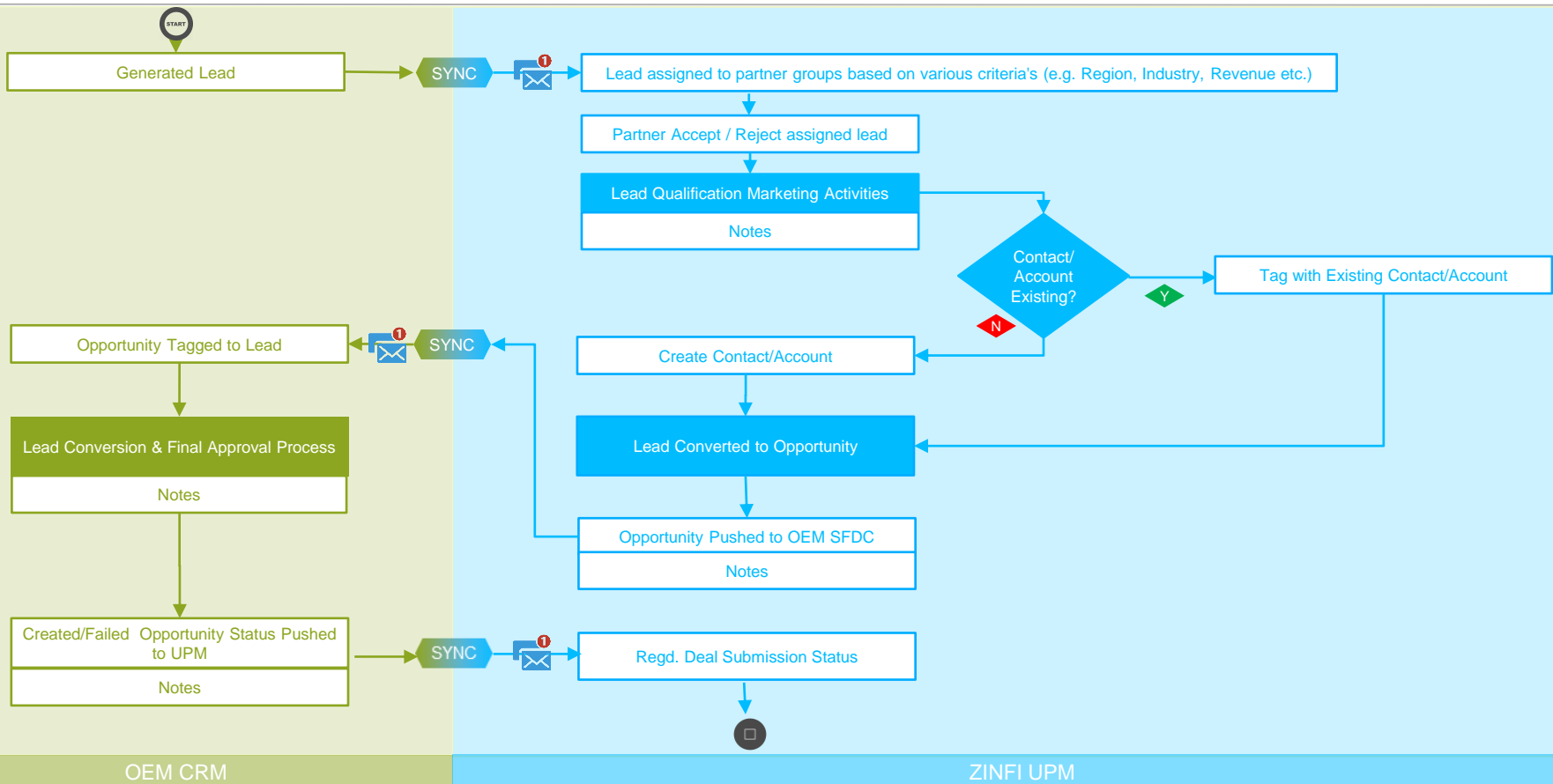
1. CRM Admin – Lead creation in CRM
2. CRM Admin – Lead assignment to partner in UPM initiated
3. Automated Process – CRM lead syncing with UPM
4. Partner – View details of assigned lead
5. Partner – Lead nurturing process initiated in UPM

Mapped Modules

UPM	CRM
Prospect	Lead

Work Flow Use Case 4

Lead Assignment to Partner Groups (Round Robin)



Activities Performed

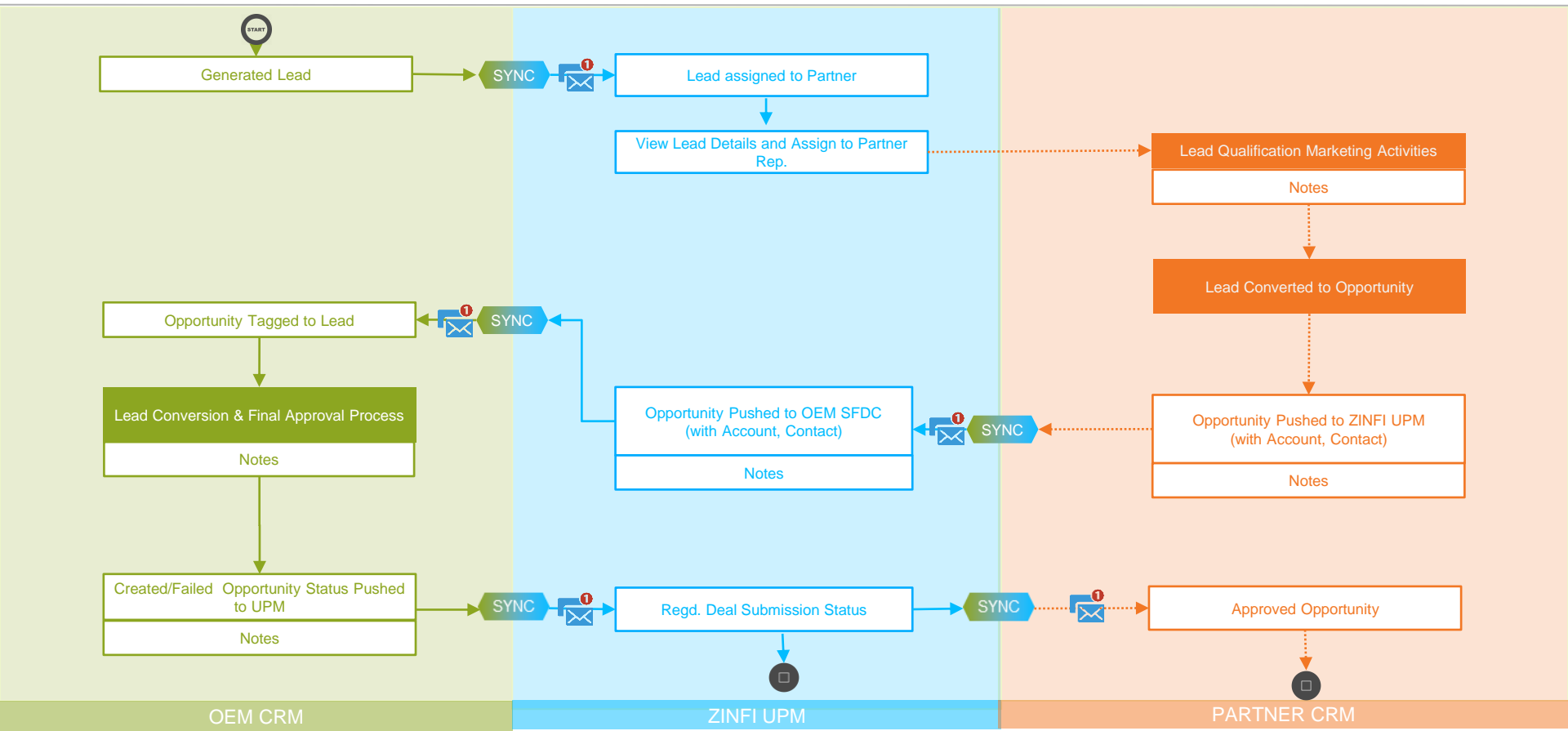
1. CRM Admin — Lead creation in CRM
2. CRM Admin — Lead assignment to partner group in UPM initiated
3. Automated Process — CRM lead syncing with UPM
4. Automated Process — Lead assigned to partner groups based on various criteria's (e.g. Region, Industry, Revenue etc.)
5. Partner — View lead in Lead Inbox
6. Partner — Accept / Reject assigned lead
7. Partner — Lead nurturing process initiated for accepted leads

Mapped Modules

UPM	CRM
Prospect	Lead

Work Flow Use Case 5

Lead Sync with Partner CRM



Activities Performed

1. CRM Admin – Lead creation in OEM CRM
2. CRM Admin – Lead assignment to partner in UPM initiated
3. Automated Process – OEM CRM lead syncing with UPM
4. Partner – View details of assigned lead
5. Partner – Lead assigned to Partner Rep in Partner CRM initiated
6. Automated Process – UPM lead syncing with Partner CRM
7. Partner – Lead nurturing process initiated in Partner CRM
8. Partner – Lead conversion to opportunity in Partner CRM
9. Automated Process – Partner CRM opportunity with contact and account auto syncs in UPM with Opportunity, Account & Contact
10. Automated Process – UPM Opportunity syncs as lead in OEM CRM

Mapped Modules

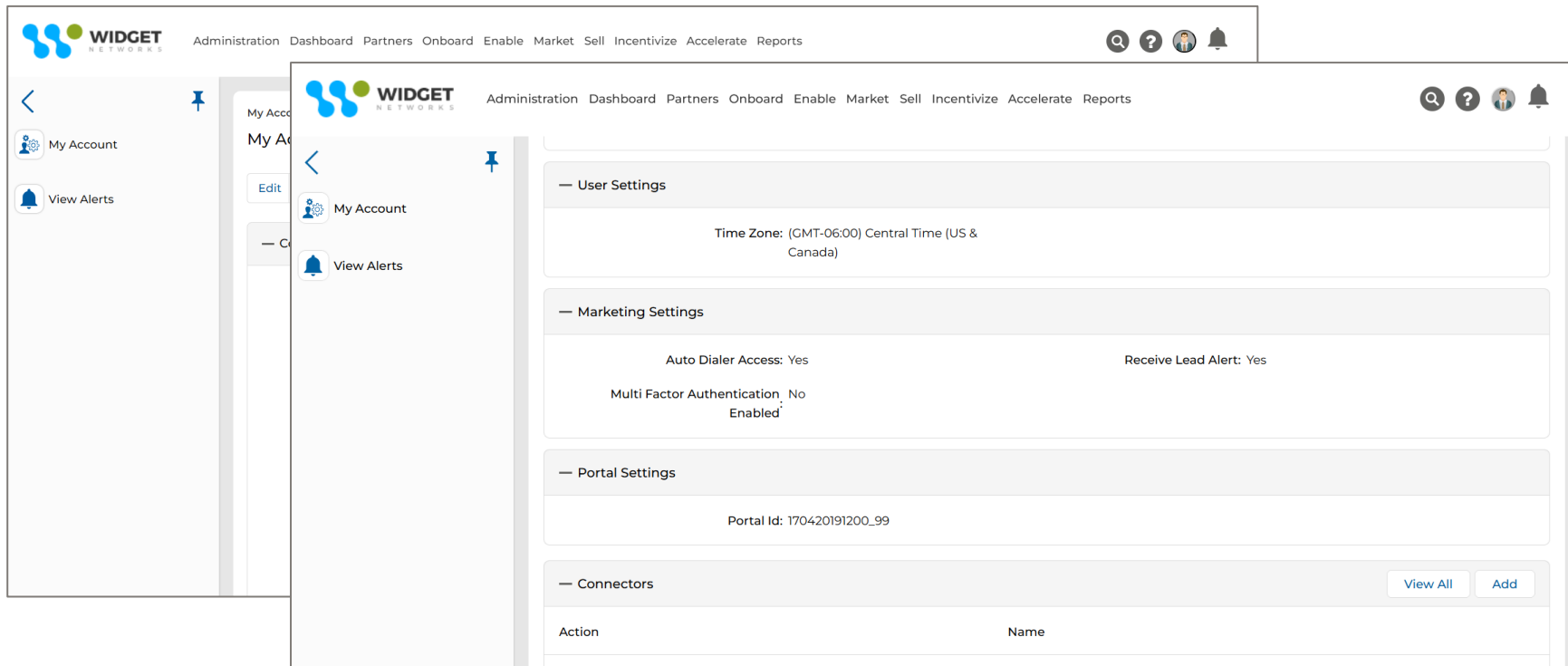
UPM	OEM CRM	Partner CRM
Prospect	Lead	Lead
Opportunity	Leads	Opportunity
Accounts	Accounts	Accounts
Contacts	Contacts	Contacts
Notes	Notes	Notes
Registered Deals	Opportunity	Registered Deals

Configuration

Each integration scenario though unique, Configuration of the Systems is a common technique, applicable for the overall integration process.


This section describes configuration techniques at UPM end for integration scenarios. This will cover the following minimal configuration premises required at UPM end:

- Account Management
- CRM Mappings (Example Case: Salesforce)
- Field Mappings



The screenshot displays the Zinfi Account Management interface. The top navigation bar includes the Zinfi logo, the title 'Account Management', and a list of menu items: Administration, Dashboard, Partners, Onboard, Enable, Market, Sell, Incentivize, Accelerate, and Reports. On the right side of the navigation bar are icons for search, help, user profile, and notifications.

The main content area is divided into two panels. The left panel, titled 'My Account', contains a sidebar with a back arrow, a 'My Account' link with a user icon, and a 'View Alerts' link with a bell icon. The right panel, titled 'My Account Settings', contains a sidebar with a back arrow, a 'My Account' link with a user icon, and a 'View Alerts' link with a bell icon. The main content of the right panel is organized into sections: 'User Settings' (Time Zone: (GMT-06:00) Central Time (US & Canada)), 'Marketing Settings' (Auto Dialer Access: Yes, Multi Factor Authentication: No, Receive Lead Alert: Yes, Enabled), 'Portal Settings' (Portal Id: 170420191200_99), and 'Connectors' (Action, Name). The 'Connectors' section has 'View All' and 'Add' buttons.


Administration
Dashboard
Partners
Onboard
Enable
Market
Sell
Incentivize
Accelerate
Reports

<
Administration > Connections > View Connector

View Connector

Edit
Delete
Assign To
Connect with OAuth

Authentication Details


Name: Salesforce V2 devoffline

Type: Salesforce

Configured: Yes

Connection Url: system/sfdc/callapi/26AB474C-988B-4E24-A3B4-297E33B43F5E

Connector Logo:



SFDC.png

Field Mapping Url: ucm/38/2407/manage-mapping/26AB474C-988B-4E24-A3B4-297E33B43F5E

Type: OAuth

Manage Job Url: ucm/38/2382/List/0

Connector Type: CRM

Version: V2


Scheduler Index: 330

Mode: Production

OAuth Details

Authorize URL:


oAuth Url: https://login.salesforce.com/services/oauth2/token?grant_type=refresh_token&client_id=


Administration Dashboard Partners Onboard Enable Market Sell Incentivize Accelerate Reports

Administration > Integration Connectors

Manage Integrations

Save Re-Sync Objects Add



CRM Objects

Account

Account Name

Billing City

Website

UCM Modules

Accounts

Contacts

Opportunities

PAccounts

PContacts

Prospects

Account

Accounts

+ Manage Mapping

CRM Field

UCM Field

Account Name

Billing City

Website

Name

Billing Address City

Website

-

Settings

Contact

Contacts



+ Manage Mapping

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Templates

The Templates for a basic integration process between CRM (Example Case: Salesforce) and UPM is being formulated as below:

- View Leads List page at CRM
- Leads Details page at CRM - Introduction of links using ZINFI Connector to Assign the Lead to Partner / Shark Tank
- Lead Validation Criteria and Lead Assignment
- CRM (Salesforce) Assigned Leads at UPM

Zinfi
Setup
Help
Sales

Home
Chatter
Campaigns
Leads
Accounts
Contacts
Opportunities
Forecasts
Contracts
Orders
Cases
Solutions
Products
Reports
Dashboards

Create New...

Recent Items

- Polycom Zinfi

Recycle Bin

Quick Create

First Name

Last Name

Company

Phone



Email

Campaign

Save

New Lead
Change Status
Change Owner

Action	Name	Company	State/Province	Email	Lead Status +	Created Date	Owner Alias	Unread By Owner
<input type="checkbox"/> Edit Del +	Smith, John	ACME Widgets	CA	john.smith@acmewidgets.com	3. Marketing Qualified Lead	10/18/2017	mwalker	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del +	Garcia, Maria	ZINFI			2. Marketing Nurture	10/31/2017	pmminteg	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del +	MANE, LAXMI	Godrej	Not Applicable	mane@godrej.com	1. Marketing Response	4/19/2010	pfast	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del +	kumar, senthil	actis technologies pvt ltd	TAMIL NADU	senthil.kumar@actis.co.in	1. Marketing Response	6/14/2012	pfast	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del +	Bouchard, Dave	QLOOG	HYOGO-KEN	dave@qloog.com	1. Marketing Response	5/30/2013	quest	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del +	white, brian	ProAV Solutions WA	Western Australia	brian.w@proavsolutions-wa.com.au	1. Marketing Response	8/8/2013	quest	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del +	kumar, shubham	vodafone technologies pvt. ltd	DELHI	shubham@vodafone.in	1. Marketing Response	8/26/2013	quest	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del +	Derby, Rich	ZINFI			1. Marketing Response	10/23/2017	pmminteg	<input type="checkbox"/>
<input type="checkbox"/> Edit Del +	Tysonn, Emervy	Test Company		emervy2401@testmail.com	1. Marketing Response	10/24/2017	Unassigned Queue	<input checked="" type="checkbox"/>





Zinfi
Setup
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Sales

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Forecasts
Contracts
Orders
Cases
Solutions
Products
Reports
Dashboards
+

Create New...

Recent Items

-  Polycom Zinfi

Recycle Bin

Quick Create

First Name

Last Name

Company

Phone

Email

Campaign

Back to List: Leads

- Open Activities (0)
- Activity History (0)
- Campaign History (1)
- Notes & Attachments (0)
- Chat Transcripts (0)
- Lead History (5+)
- Lead Met...

Lead Detail



Lead Information

Name	John Smith	Channel Rep Name	
Clean Status	Not Compared	Do Not Call	<input type="checkbox"/>
Title	Administrator	Country Code	1
Lead's Role	Evaluator	Phone	(408) 555-1212
Job Function	Administrator	Pre Call Notes	
Department	IT	Mobile	
Email	john.smith@acmewidgets.com	Switchboard	
Email Opt-In	None	Fax	
Email Opt-out	No	Fax Opt Out	<input type="checkbox"/>
D_U_N_S		Check to Notify Lead Owner	<input type="checkbox"/>
Contact Type	AV Integrator	Mark as Lead	<input checked="" type="checkbox"/>
Email Hard Bounced	<input type="checkbox"/>	Market2Lead Notes	
Qualified By	Tim Lydon	Lead Source	Campaign Microsite
Lead Owner	Matt Walker [Change]	Lead Status	3. Marketing Qualified Lead
Rating	Hot	Lead Status Reason	First Call Attempt
Contact Segmentation		PMM Sync Status	Pending

Company Information

Company	ACME Widgets	Existing Relationship with Polycom	No
D&B Company		No. of Employees	99

We will introduce two new button to assign the Lead to Partner / Shark Tank



 18

Zinfi
Setup
Help
Sales

Home
Chatter
Campaigns
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Contacts
Opportunities
Forecasts
Contracts
Orders
Cases
Solutions
Products
Reports
Dashboards

Create New...

Recent Items

 Polycom Zinfi

Recycle Bin

Quick Create

First Name

Last Name

Company

Phone

Email

Campaign

Lead Information

ACME Widgets
1234 Main Street
Sunnyvale
CA
United States

Vertical Industry: Healthcare
No. Of Employees: 99
Preferred Language: English

Product Interests: RealPresence Centro
Delivery Preference: On Premise
UC Platform:

Partner Validation Criteria

☐ Geographical Match
☐ Product Certification Match
☐ UCM Approved Users

Partner Assignment

No Partners in the system suitable for this lead


Manually Assign Named Partner


--None--

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z





Page of 1 in Results
No related contacts exist for the selected Account



☒ Notify Partner of New Assignment

 WIDGET NETWORKS

 WIDGET PARTNERS

Onboarding ▾ Partners Learning Planning Library Marketing Sales Community Reports





Products & Solutions

Lead Management

Lead Inbox

Prospects

Companies

Contacts

Accounts

Opportunities

Tasks

Notes

Sales > Lead Inbox

Lead Inbox

Accept Reject Search Clear Search Saved Searches Select ▾

Selected (1)	Date Assigned	Company	Name	Title	Email	Phone	Favorite ▲	Flag
<input type="radio"/>	01/20/2021	dog company	Mark Nick		markn@dog.com		No	+6
<input type="radio"/>	10/08/2018	Buzzbean	Oralia Urry		ourry0@cnn.com		No	+6
<input type="radio"/>	08/28/2018	MBC	Dipanda Dicka		dipanda@mbc.com		No	+6
<input type="radio"/>	07/05/2019	Aethna Home Products	Kristen Akin		kakin@aethnahome....		No	+6
<input checked="" type="radio"/>	02/03/2018	Buzzshare	Simone Danjoie		sdanjoie5@state.gov		No	+6

10 ▾

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(The selected page no: 2/2 | Total Record:15)

Typical Implementation Timeline

Core Steps	1	2	3	4	5	6	7	8	9	10	11	12
Basic Work Flow	x											
Use Case Work Flow 1		x										
Use Case Work Flow 2			x									
Use Case Work Flow 3				x								
Use Case Work Flow 4					x							
Use Case Work Flow 5						x						
Integration Strategy							x	x				
Screen & Flow Moqups							x	x				
Integration								x	x	x		
Testing										x	x	
Release												x



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