The Forrester Wave™: Partner Relationship Management (PRM) Platforms, Q3 2016

The Eight Providers That Matter Most And How They Stack Up

by Tim Harmon

August 8, 2016

Why Read This Report

In Forrester's 32-criteria evaluation of partner relationship management (PRM) platform vendors, we identified the eight most significant software providers in the category — Allbound, Channelplace, Impartner, Outbound, PartnerPath, Relayware, Salesforce, and Zinfi Technologies — and researched, analyzed, and scored them. This report shows how each provider measures up to help B2B marketing professionals and their technology management colleagues select the right vendor for their PRM platform.

Key Takeaways

No Vendor Leads The Pack, But There Are Several Strong Performers

Forrester's research uncovered a market in which there are no outright leaders. Salesforce, Impartner, Zinfi Technologies, PartnerPath, and Relayware offer competitive options. Allbound, Channelplace, and Outbound lag behind.

Channel Pros Are Looking For Ecosystem Modeling And Tier Management

The PRM market is growing because more B2B channel professionals see these platforms as a way to address their top challenges — and these channel pros increasingly trust PRM providers to act as strategic partners, advising them on their top channel enablement decisions.

Configurability And Customization Are Key Differentiators

As older PRM technologies become outdated and less effective, improved adaptability and customization will dictate which providers will lead the pack. Vendors that can provide smooth integration and high levels of customization position themselves to successfully deliver a variety of use cases for their customers.

The Forrester Wave™: Partner Relationship Management (PRM) Platforms, Q3 2016

The Eight Providers That Matter Most And How They Stack Up



by Tim Harmon
with Peter O'Neill, Jacob Milender, and Rachel Birrell

August 8, 2016

Table Of Contents

2 **The PRM Market Is Hitting A Turning Point For Growth**

PRM Platforms Help B2B Marketers Tackle Their Channel Challenges

PRM Is More Than CRM And Partner Opportunity Management

6 **PRM Platform Evaluation Overview**

Buyers Are Giving More Consideration To PRM's Foundational Elements

Evaluated Vendors Span A Variety Of Market Needs

8 **Vendor Profiles**

Leaders

Strong Performers

Contenders

14 **Supplemental Material**

Notes & Resources

Forrester interviewed 22 vendor and user companies, including Allbound, Apptio, Canon, Celigo, Channelplace, Cisco, Dolby, Emerson Network Power, Golf Now, Impartner, Internet Creations, Landesk, LogRythym, Nutanix, Outbound, PartnerPath, Pentair, Rackspace, Relayware, Salesforce, Tempered Networks, and Zinfi Technologies.

Related Research Documents

The Forrester Wave™: Through-Channel Marketing Automation Platforms, Q3 2015

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The PRM Market Is Hitting A Turning Point For Growth

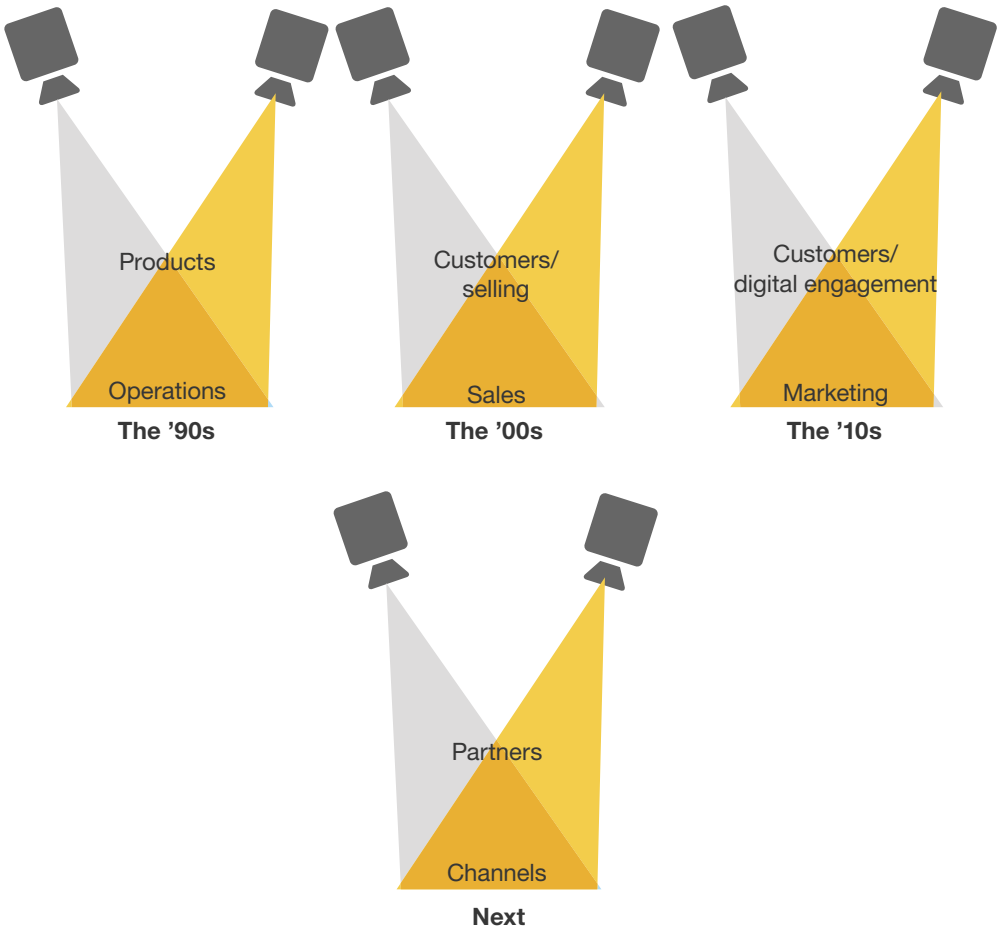
Every B2B company with a channel partner ecosystem — whether it's made up of resellers, distributors, agencies, brokers, or advisors — has some sort of partner relationship management (PRM) system, even if it's custom-built or a spreadsheet and email hack. A PRM system reflects and supports the key tenets of partner relationship management, which Forrester defines as:

> *The dynamic business processes and programs — and supporting technology — that support the key roles and activities of targeting, recruiting, enabling, managing, understanding, and collaborating with partners for the purpose of delivering holistic (manufacturer-partner) solutions to customers.*

B2B marketing professionals in many sectors, together with their technology management colleagues, have been investing in PRM automation solutions since the mid-2000s, but with the exception of one vendor, the PRM market has suffered slow growth for most of that time.[1] But in the past year, we have seen a significant uptick in PRM activity.[2] This is due largely to the fact that channel chiefs' and channel marketing/management professionals' investments and operations are under increasing scrutiny from their CEOs and board directors, so they need a system of record and system of insight to provide accountability and transparency (see Figure 1).[3]

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FIGURE 1 The Accountability Spotlight Is Now Shining On The Channel Function



PRM Platforms Help B2B Marketers Tackle Their Channel Challenges

The one constant of channel ecosystems is that they are always changing.[4] Channel partners, like customers in the age of the customer, have become more inspective of manufacturers and vendors they choose to represent; new channel partners are entering the market with new business models; and channel partner enablement and economics are taking on new meaning as more and more B2B companies deliver their products “as a service.” Many B2B channel professionals are using these changes to take a fresh look at commercial PRM platforms and to address:

› **Escalating costs due to inefficiencies.** B2B channel professionals wielding spreadsheets or aging custom-built applications for PRM often lose certifications, leads, and deals in a business process “black hole.” The result? Channel pros spend a lot of time back-tracking communications, while their channel partners question their commitment to their manufacturer. They both spend more time on the phone and in the field addressing problems and rectifying errors and omissions.

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- **Constraints on scaling.** Our research indicates that most channel marketing/management professionals "hit the wall" when using a spreadsheet to support about 50 channel partners. This is frustrating because they can see the opportunity to recruit 500 or 5,000 partners for leveraged growth but have no way to manage that many relationships.
- **The inability to attract the most productive partners.** Channel partners have constraints on their own time and resources, so the ease of doing business together is now a significant partnering criterion.[5] The top performers, in particular, are increasingly looking to place their bets — and their loyalty — with the manufacturers that offer the best PRM systems to smooth their business processes and knowledge transformation.

PRM Is More Than CRM And Partner Opportunity Management

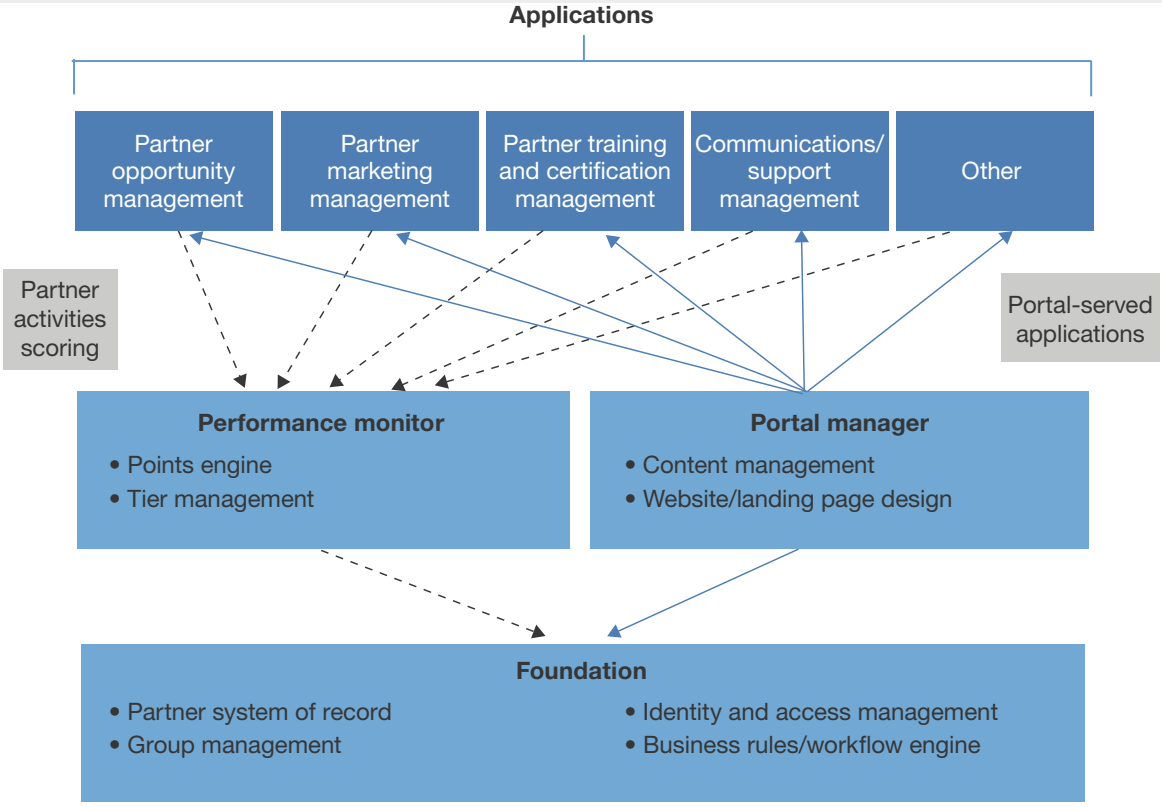
PRM is often thought of as an "outside the firewall" extension to customer relationship management (CRM), due to the fact that PRM was rooted in supporting the partner opportunity management function. While partner opportunity management remains an important staple of PRM, today's PRM solutions are much broader in scope.[6] They deliver applications through a portal and comprise (see Figure 2):

- **A system of record as the foundation.** This is the database schema that models your channel partner ecosystem at both the company and individual level: organizational and location structures, partner tier levels, partner business model types, skills and certifications, market savvy, staff role constitution, partner-to-partner relationships, etc. You can extend that schema to include custom attributes.
- **Partner program/performance management.** PRM solutions should be able to model the "gives" (performance) and "gets" (rewards) of the master manufacturer-partner relationship program (tiers). Ideally, you should be able to award points to partners for any desired combination of activities or behaviors and then use those points to determine their tier or provide other rewards.[7]
- **Partner portal/content management.** A partner portal is a website through which content, applications, and communications flow between a manufacturer and its channel partners. Most PRM implementations begin with a content-centric partner portal. The key portal management requirement is adaptability, as savvy channel pros will want to advance their partner portals to support the more valuable business processes and interactions. Many channel partners also expressed a (largely unmet) desire to use mobile apps as well as websites for partner portal/content management.
- **Partner opportunity management.** Partner opportunity management is commonly considered to be the original bellwether of PRM; in fact, it's why many B2B channel marketers mistakenly discount PRM's evolution and see it as nothing more than "extended CRM." Although partner opportunity management includes standard CRM business planning applications (e.g., marketing plans, sales forecasts) and deal support applications (e.g., price desk, sales playbooks), it also supports unique partner deal registration.[8]

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- **Partner marketing management.** Partner marketing management involves co-op fund and market development fund (MDF) management and lead management.[9]
- **Partner training and certification management.** Partner training and certification involves more than a learning management system (LMS); training output must flow into certification, as certification is based at least partially on training results. Certification grants can also focus on other activities, such as customer implementations and third-party education credits.
- **Partner communications and support management.** Channel marketing/management professionals need to send, receive, and log their communications with their partners, preferably using dynamic grouping to customize communications for more relevance.

FIGURE 2 Today's PRM Solutions Offer Deeper Foundational Elements



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PRM Platform Evaluation Overview

To assess the state of the PRM platform market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top PRM platform vendors. After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 32 criteria, which we grouped into three high-level categories:

- **Current offering.** We looked at the breadth of vendors' product offerings, foundational structure, and global capabilities. We also evaluated their partner performance management abilities, their usability, and the strength of their technology platform and tools.
- **Strategy.** We examined the strength of the vendors' product strategy and vision as well as how they intend to differentiate in the PRM market. We focused on the methods vendors use to deliver a satisfactory application ownership experience to their customers. We also considered vendors' technology partnerships and their own relationships with channel partner organizations, such as value-added resellers (VARs), systems integrators (SIs), and consultants.
- **Market presence.** We gauged the size of vendors' customer and user base, and we evaluated the depth of the human and financial resources available to enhance their products and serve customers.

Buyers Are Giving More Consideration To PRM's Foundational Elements

Forrester last published an evaluation of PRM solutions in Q4 2013, and it is not only the vendor landscape that has changed. For this Forrester Wave, we increased the weightings for PRM's foundational elements, such as the system of record, relative to the business applications like partner marketing management that sit upon them, as channel professionals have indicated that their No. 1 technology priority is the flexibility to adapt as their channel ecosystem grows in diversity and complexity.[10] In particular, B2B channel management/marketing professionals need to hone their PRM solution selection according to their channel model and management goals that involve:

- **Ecosystem modeling.** To what extent does the system model "who" (partner company and partner company employee attributes), "what" (enablement programs), "why" (key performance indicators), "when" (business rules), and "state" (recruitment, onboarding, certification maturity, transformational, etc.)?
- **Segmentation.** Segmentation is critical for partner experience. Corporate marketers don't treat their customers as one homogeneous market; channel marketers shouldn't treat their partners as such, either. And while it isn't feasible to launch enablement programs to individual partners, channel marketers should expect their PRM system to support granular group definition and management. For example, you may want to target a particular program, communication, or ability to Gold and Silver partner technical personnel in Europe or to IoT-certified manufacturer reps in New England.

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- **Tier management.** Partner tiering — the recognition and reward of partners based on various aspects of performance — represents a special type of grouping. Channel pros' ability to model and manage those tier definitions and communications is paramount for partners, as their tier benefits factor directly into their financial plans.
- **Business model typing.** Grouping goes beyond tiers, regions, roles, and skills. Just as each region may warrant operations with a unique channel program, so too may each business model type. Managed services providers have a different set of training needs and customer performance metrics than resellers.
- **Identity and access management.** With a robust PRM system at your disposal, you now have companies, people, and groups to manage in terms of the programs you design and launch, system rights you grant, and announcements and changes you communicate. A centralized identity and access management capability is crucial to understanding who can do what and who gets what. After all, employee turnover (involving new channel program administrators who need to understand the channel ecosystem and programs) and compliance audits are inevitable.

Evaluated Vendors Span A Variety Of Market Needs

Forrester included eight vendors in our assessment of PRM platforms: Allbound, Channelplace, Impartner, Outbound, PartnerPath, Relayware, Salesforce, and Zinfi Technologies. Each of these vendors has (see Figure 3):

- **A multifunctional PRM platform.** Each vendor has platform management and partner portal/content management functionality and offers a minimum of two of the other PRM application subdisciplines and tools. Each PRM vendor takes a slightly different portfolio approach to the applications. While all include applications for partner opportunity management (an original tenet of PRM), they have differing views on the breadth of the channel management technology spectrum. For example, some don't invest much R&D in partner training and certification management and instead lean on third-party LMS solutions.[11] Others have solution portfolios that go beyond classical definitions of PRM.[12]
- **A solution suitable for large or developing channel organizations/ecosystems.** Some vendors we included focus on and have references from large organizations with complex requirements. These include the ability to scale on a global basis, manage end-to-end business processes, integrate into complex legacy environments, and manage large volumes of channel-related data. Smaller channel organizations and regional divisions of large channel organizations typically face more technology and budget constraints, so we included some vendors that offer PRM solutions with quicker deployments and a lower total cost of ownership (TCO). To highlight those vendors with a lower TCO, weight the pricing structure and applications criteria more heavily.[13]
- **A product now in general release and in use by customers.** The solutions we included had a specific release that was generally available at the time we collected data for this evaluation; they also had references that we could contact.

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FIGURE 3 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product evaluated	Product version evaluated
Allbound	Partner Sales Acceleration Platform	4.0
channelXperts GmbH	ChannelPlace	
Impartner	Impartner PRM	5.0
Outbound	Channel360	
PartnerPath	PartnerPath PRM	3.0
Relayware	Relayware	2016.1.4
Salesforce	Salesforce Partner Community	Spring '16
Zinfi Technologies	Partner Relationship Management Software	8.1

Inclusion criteria
A product that supports platform management.
A product that supports portal and content management.
A product that supports partner program and performance management.
A product that supports business intelligence.
A product that supports partner opportunity management.
A product that supports partner marketing management.
A product that supports partner training and certification management.
A product that supports communications and support management.
A product that supports customizability and configurability.
Three public enterprises (1,000 or more employees) as reference customers that are running applications on the platform. These references must be publicly disclosable.
The platform must be generally available to customers and meet nine out of the 10 selection criteria listed above as of May 15, 2016.

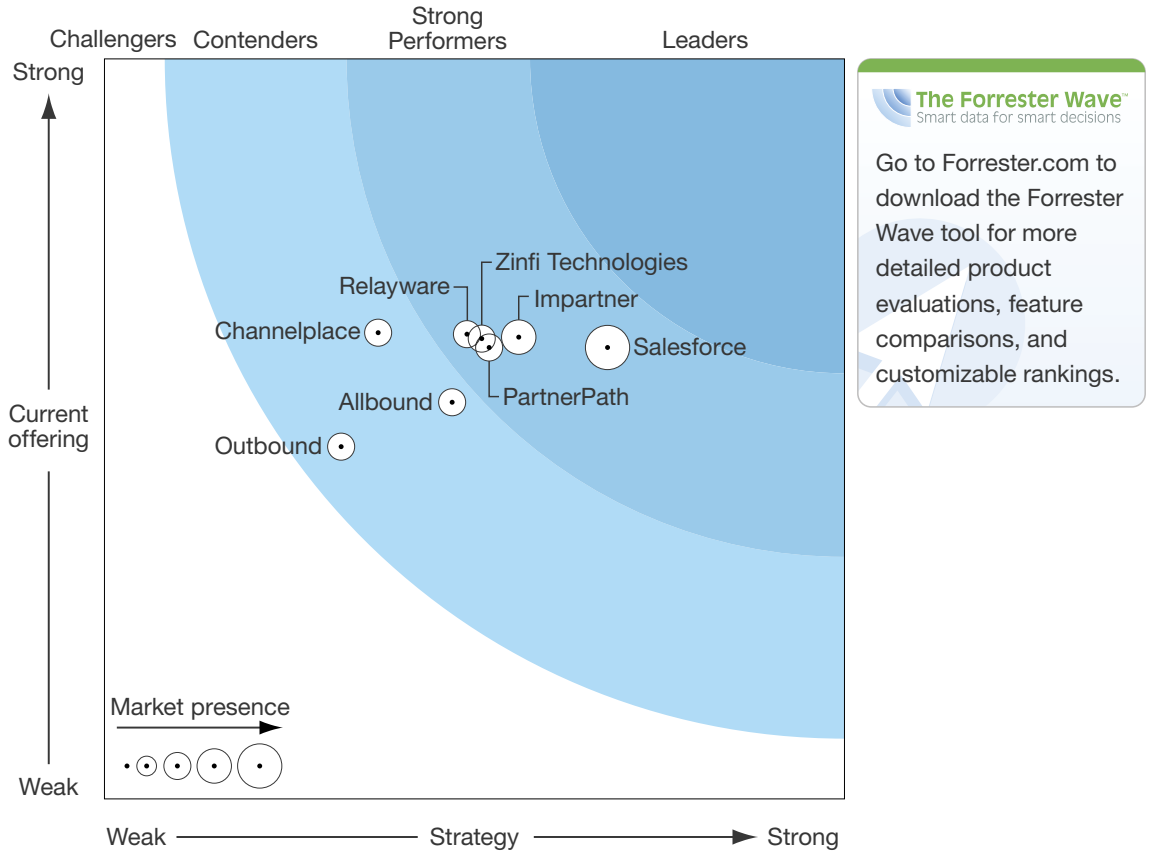
Vendor Profiles

This evaluation of the PRM solutions market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool (see Figure 4). Moreover,

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clients should use the custom weighting feature to highlight category standouts. PRM suites are so broad — with foundational elements, four or more broad application domains, business intelligence, communications and collaboration, as well as the user interface/experience (UI/X) — that it's nearly impossible for any one vendor to stand out in all of the criteria categories.

FIGURE 4 The Forrester Wave™: Partner Relationship Management (PRM) Platforms, Q3 '16



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FIGURE 4 The Forrester Wave™: Partner Relationship Management (PRM) Platforms, Q3 '16 (Cont.)

	Forrester's Weighting	Allbound	Channelplace	Impartner	Outbound	PartnerPath	Relayware	Salesforce	Zinfi Technologies
CURRENT OFFERING	50%	2.68	3.15	3.12	2.38	3.05	3.14	3.05	3.11
Platform management	20%	3.00	4.60	2.60	4.00	3.00	3.00	4.20	3.80
Portal/content management	12%	3.00	3.50	4.50	1.50	3.50	4.00	4.00	3.50
Partner program/performance management	12%	2.80	3.50	2.40	2.00	2.90	3.40	2.20	2.80
Business intelligence	10%	3.00	3.00	4.00	5.00	4.00	2.00	2.00	3.00
Partner opportunity management	5%	1.90	2.90	3.55	2.45	3.55	3.00	2.45	2.55
Partner marketing management	5%	1.30	2.30	3.00	2.60	4.30	3.00	1.60	2.90
Partner training and certification management	6%	0.80	2.40	2.60	1.00	2.60	4.40	1.60	3.40
Communications/support management	3%	2.40	2.40	2.40	2.60	0.70	3.40	4.30	3.70
Customizability/configurability	15%	2.00	2.65	4.00	1.65	2.00	3.00	3.70	2.65
User experience	12%	4.20	1.80	1.80	0.20	3.40	2.80	2.40	2.60
STRATEGY	50%	2.35	1.85	2.80	1.60	2.60	2.45	3.40	2.55
Corporate strategy	30%	3.00	2.00	3.00	2.00	3.00	2.00	3.00	3.00
Industry strategy	20%	1.00	0.00	2.00	0.00	1.00	3.00	5.00	2.00
Pricing structure	25%	4.00	4.00	3.00	3.00	4.00	3.00	1.00	4.00
Ecosystem strategy	25%	1.00	1.00	3.00	1.00	2.00	2.00	5.00	1.00
MARKET PRESENCE	0%	2.63	2.49	3.09	2.78	2.98	2.77	4.29	2.49
Customers	40%	3.80	2.40	3.00	2.90	3.10	3.40	4.00	2.40
Financials	30%	2.40	2.70	3.00	2.40	2.70	2.00	3.95	1.70
Global presence	30%	1.30	2.40	3.30	3.00	3.10	2.70	5.00	3.40

All scores are based on a scale of 0 (weak) to 5 (strong).

Leaders

At this time, Forrester did not identify any Leaders in the PRM platform market. Those vendors with strong product offerings tended to be weak in terms of their own ecosystem development, such as systems integrators or consultants, or vision and road map — and vice versa.

Strong Performers

› **Salesforce boasts a robust platform for PRM.** Salesforce is the gorilla in the PRM market today, having more customers and ecosystem partners and global support resources than other PRM vendors by an order of magnitude. Salesforce's PRM solution, an extension of its Community Cloud offering, is strongest in some of the foundational elements of PRM. The product leads with

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its clear, comprehensive identity and access management capabilities, an important capability for customers wanting to segment and track many thousands of channel partners. And Salesforce's Force.com development environment lends itself well to the specific customization requirements of larger channel organizations.

But while highly customizable, Salesforce's PRM solution typically requires just that — a good deal of customization — as there is relatively little PRM application functionality. Significant customization, Salesforce's per-partner-user (as opposed to per-partner-company) licensing scheme, and the fact that the partner support element of its solution requires additional ServiceCloud licensing typically makes for an expensive PRM solution. Salesforce's PRM solution is best for large channel organizations with large channel partner ecosystems and extensive custom requirements.

› **Impartner leverages its tight integrations with Salesforce Sales Cloud.** Impartner is the new moniker for the company formerly known as Treehouse Interactive; it rebranded shortly after it was acquired in 2015. Impartner bases much of its value on "embedded" functional integration with Salesforce Sales Cloud, which many channel account managers use. For those channel organizations that want to operate entirely in Salesforce (and are OK with the Salesforce UI), much of Impartner's PRM functionality is instantiated in the Sales Cloud solution under functional PRM tabs. Impartner has beefed up its portal/content management capabilities — customers' partner portal implementation times have decreased significantly — and added a workflow engine, although it hasn't yet fully incorporated this into all the functional aspects of its PRM solution.

Impartner has not updated its aging native UI much since being acquired, choosing instead to place most of its bets on integration with Salesforce. And while Impartner has shored up some elements of its PRM applications, its solution lags in partner tier program management and partner training program support. Impartner's PRM solution is best suited for channel organizations wanting a PRM solution that is tightly woven into Salesforce's CRM solution, at a lower cost than Salesforce's PRM.

› **Zinfi Technologies brings a strong foundational bent to PRM.** Zinfi's PRM solution has grown out of its strong channel management/marketing concierge services business. The company's global support is second only to that of Salesforce. Zinfi's PRM solution is particularly strong in some of the foundational elements of PRM, specifically its robust support for partner taxonomy/typing and partner tier management. Moreover, Zinfi is extending the definition of PRM — its solution portfolio extends beyond PRM to include through-channel marketing automation (TCMA) and sales enablement offerings.

Zinfi's strategy of functional breadth is a tradeoff in some cases for depth. The company's broad view of channel management/marketing support leaves its PRM solution wanting in terms of functionality for some detailed PRM applications, such as MDF management and deal registration. Zinfi's PRM solution is best suited for channel organizations looking for broad channel management/marketing capabilities for both product and services support.

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› **PartnerPath instantiates its channel knowledge in its PRM solution.** PartnerPath has long been recognized as one of the leading channel management consultants. The company is transitioning from a consulting business model to a product one, and its PRM solution's foundational elements reflect its best-practices consulting roots. PartnerPath's PRM solution also sports strong business intelligence capabilities, which form the basis for much of the company's vision.

However, PartnerPath's business model is neither fish nor fowl — neither product vendor nor consulting company — which dampens its ability to develop a supporting partner ecosystem of its own. The company also has little vertical industry penetration outside the tech industry. PartnerPath's PRM solution is best suited for midsize channel organizations that want a performance-analytics-fueled partner program capability.

› **Relayware brings comprehensive depth to PRM.** Relayware's PRM solution delivers comprehensive PRM application functionality on top of a business rules engine platform. The solution's partner training and certification support capabilities are particularly strong. Relayware has also added a performance points system, whereby you can allocate points to partners for defined activities and behaviors; coupled with its rules engine, you can use this to define partner tier criteria.

However, Relayware's PRM solution is somewhat architecturally dissonant, having evolved largely as application modules developed independently over time; one example of this is that its rules and administration capabilities are dispersed and interfaced differently throughout the product set. Relayware's PRM solution is best suited for organizations with sophisticated partner programs and internal PRM support resources.

Contenders

› **Allbound focuses on the partner experience.** As the newest vendor in the PRM fold, Allbound brings a fresh perspective to PRM. The company believes the success of a PRM solution depends on the partner's experience of that solution, so it has devoted much of its development to a top-notch UI. Moreover, Allbound has gone beyond the classical definition of PRM to include innovative sales enablement functionality, such as support for sales playbooks, social media content posting, and gamification.

But Allbound's status as the new kid on the block also results in a PRM solution that is not as mature or functionally deep for some core PRM applications, such as those for partner training and certification, partner marketing, and business planning. Allbound's PRM solution is best suited today for the channel field function and for midsize channel organizations keen to engage partners.

› **Channelplace does a lot with a little.** Despite being one of the smaller PRM vendors we evaluated, Channelplace brings a strong PRM solution to bear by focusing its own resources on the core elements of PRM, such as the system of record foundation and identity and access management, while OEMing or reselling some application elements. (Channelplace's PRM partner training and certification capabilities are actually those of a third party.) In addition to PRM, Channelplace's solution sports some TCMA capabilities as well.

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But while deep in some core functional aspects of PRM, Channelplace's PRM solution suffers from an outdated UI. The company doesn't invest much in marketing nor does it have much presence outside Europe — more specifically, outside Germany. Channelplace's PRM solution is best suited for midsize European companies and regional European channel organizations that don't require a lot of vendor support.

› **Outbound addresses PRM via solution customization and managed services.** Outbound's PRM solution is not a product per se, but it is offered as a managed service; this is why it scored 0 for its UI. Outbound uses its PRM technology as a framework upon which it builds custom PRM functionality. Outbound is very good at supporting channel sales operations, and its PRM solution includes attributional cross-program analytics capabilities, which are key for determining return on channel investment.

Outbound's market is limited today to the UK and, to a lesser extent, Western Europe. Outbound's PRM solution is best for regional European channel field teams, but large channel organizations with custom PRM requirements could also leverage it.

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Supplemental Material

Online Resource

The online version of Figure 4 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution. We evaluated the vendors participating in this Forrester Wave, in part, using materials that they provided to us by July 22, 2016:

- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.
- **Product demos.** We asked vendors to conduct demonstrations of their products' functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with two of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave evaluation — and then score the vendors based on a clearly defined scale. We intend these default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to http://www.forrester.com/marketing/policies/forrester-wave-methodology.html.

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Zinfi Technologies

Endnotes

[1] Salesforce's growth in the PRM market has been the exception; it added over 1,000 partner community customers during 2015. Source: Forrester's PRM Forrester Wave™ Vendor Questionnaire.

[2] We have experienced a significant increase in the number of PRM inquiries and evaluation advisories in the past year. We have also seen increased venture capital and private equity investment in the PRM space, as well as new vendor entrants. Taken together, these indicate renewed interest in and adoption of PRM solutions.

[3] Of all the challenges that B2B marketing professionals face with respect to their channel partners, none is more foundational or more pressing than their inability to determine and articulate their return on channel investment (ROCI). See the "Realizing Return On Channel Investment" Forrester report.

[4] "The only thing constant is change." Heraclitus.

[5] In Forrester's Q4 2012 US And Europe Channel Partner Business Model And Loyalty Online Survey, channel partners cited "ease of doing business" associated with vendors and suppliers' business technology (BT) systems as the top determinant of their loyalty to a particular company. See the "Leverage The Channel Management Technology Spectrum" Forrester report.

[6] In fact, many vendors that we recognize as PRM vendors don't identify themselves as "PRM" vendors. Why? Because they don't want to position their value solely on the partner opportunity management function and they want to distance their solutions from "CRM" for fear of having to compete with Salesforce.

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[7] To help eBusiness and channel strategy pros gauge their partners' loyalty, Forrester has developed an indexing tool — the Partner Loyalty Index. See the "The Forrester Partner Loyalty Index" Forrester report.

[8] Sales enablement vendors have historically targeted their solutions to direct sales forces, but some channel marketing/management professionals are beginning to evaluate the suitability of sales enablement solutions to facilitate deal support for their channel partners.

[9] Through-channel marketing, whereby channel partners are equipped by their manufacturers with marketing campaign packages and tactics for execution, is beyond the scope of this evaluation. We cover through-channel marketing in a separate Forrester Wave. See the "The Forrester Wave™: Through-Channel Marketing Automation Platforms, Q3 2015" Forrester report.

[10] For example, if your PRM system supports only reseller partners and reseller programs but your ecosystem increasingly consists of agents, managed service providers, aggregators, or market access providers — for which your channel programs may differ dramatically — you will find that your PRM solution will only apply to a narrower and narrower slice of your partner ecosystem.

[11] Likewise, while many PRM vendors offer an incentive program management application, they pale compared with those of point solution channel incentive program management solution vendors. See the "Vendor Landscape: Channel Incentive Program Management Solutions" Forrester report.

[12] For example, Channelplace, Impartner, and Zinfi Technologies offer TCMA solutions in addition to PRM. See the "Turn Your Channel Into A Marketing Machine" Forrester report.

[13] If a vendor has a lower current offering score for applications — such as partner opportunity management, partner marketing management, or partner training and certification management — it suggests that its solutions will require more custom development and integration and thus higher implementation costs.

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