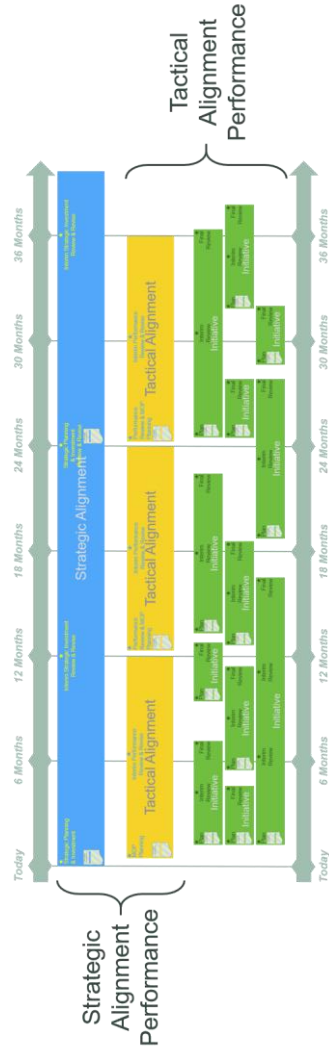
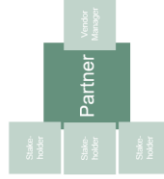


Measuring and Monitoring Partner & Portfolio Business Performance

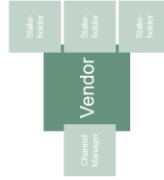


Partner Goals/Objectives vs. Performance



"Did you meet my objectives?"

Vendor Goals/Objectives vs. Performance



"Did you meet my objectives?"

VS.

Partnership Goals/Objectives

"Here's what our partnership did with your investment ..."



"Did we meet our mutual objectives?"

		METRIC or KPI									
Value	How does this metric help manage & measure the business?	Target(s) & Milestone(s)	What is the target for this metric? What interim milestones will help identify, if we are making appropriate progress?	Benchmark(s)	What industry or historical benchmark(s) can I use to compare performance on this metric?	Related Metric(s)	What other metrics impact the performance of this metric (e.g. leading indicators, dependent metrics)?	Lever(s)	What business / activity levers impact this metric? Which ones can we control?	Review Timing	What is the most appropriate timing (e.g. when and how often) for reviewing this metric?

TOPIC		SUCCINCT (Just the Facts)	ADDITIONAL INFO (if Required / Asked)
Current Status	●	At / Above / Below Target	By how much, in what geographies, on what products, etc.
Reasons / Explanation	Summary / List; Highest-level reasons	Summary / List; Highest-level reasons	Details; Full explanation, including inter-related causes / reasons
Current Execution Plan Revision(s)	Specific changes to be implemented	Specific changes to be implemented	Details of changes, and explanation of why these changes are the best approach
Forecasted Result	Meet / Miss / Exceed Target	Meet / Miss / Exceed Target	By how much, in what geographies, on what products, etc.
Support Needed (if any)	Specific request(s) – if any	Specific request(s) – if any	Who, when, where, etc.
Next Steps	Summary of Key Actions	Summary of Key Actions	Details of actions, ownership, due dates, etc.

Measuring and Monitoring Partner & Portfolio Business Performance

Time	Agenda	Participants
10%	1) Respective Businesses Update relevant to Partnership a) Partner b) Vendor	<input type="checkbox"/> Partner Strategic Stakeholders
10%	2) Strategic Performance High-Level Review a) Total Partnership Investment vs. Total Partnership Return b) Long-term Partnership Goal(s) Progress	<input type="checkbox"/> Partner Relationship Manager/Owner
50%	3) Strategic Performance Detail Review (Scorecard) a) Strategic Alignment KPIs / Key Metrics Review b) Tactical Alignment / MOP Summary Performance Review	<input type="checkbox"/> Vendor Strategic Stakeholders
20%	4) Risk / Challenges / Issues Discussion a) Identified Risk / Challenge / Issue Discussion b) Risk Mitigation / Challenge or Issue Resolution Planning	<input type="checkbox"/> Vendor Relationship Manager/Owner
10%	5) Next Step Planning a) Discuss / Confirm any Strategic Alignment Changes b) Next MOP(s) Goal Setting or Guidance	

External Partnership Performance Review - Strategic

Time	Agenda	Participants
10%	1) Review Strategic Alignment Context a) Partnership ROI to-date b) Long-term Partnership Goal Progress c) Relevant (if any) Tactical Alignment Direction Changes (from Strategic Alignment Review)	<input type="checkbox"/> Partner Tactical Execution Stakeholders
10%	2) Tactical Performance High-Level Review a) Short-term (MOP) Partnership Goal(s) Progress b) Tactical Partnership Investment vs. Tactical Partnership Return	<input type="checkbox"/> Partner Relationship Manager/Owner
50%	3) Tactical Performance Detail Review (Scorecard) a) Tactical Alignment KPIs / Key Metrics Review b) Summary Initiatives Performance Review	<input type="checkbox"/> Vendor Tactical Execution Stakeholders
20%	4) Risk / Challenges / Issues Discussion a) Identified Risk / Challenge / Issue Discussion b) Risk Mitigation / Challenge or Issue Resolution Planning	<input type="checkbox"/> Vendor Relationship Manager/Owner
10%	5) Next Step Planning a) Discuss / Confirm any Tactical Alignment Changes b) Initiative(s) Focus Area Changes / Adjustments c) Initiative(s) Definition Changes / Adjustments	

External Partnership Performance Review - Tactical

Time	Agenda	Participants
10%	1) Review Partner Context a) Long-term / Strategic Partner Goal(s) b) Partner Basics & Chosen Engagement Strategy	<input type="checkbox"/> Channel Manager / Partner Account Manager
20%	2) Partnership Performance Review (External Scorecard) a) Strategic KPIs / Key Metrics Summary Review & Discussion b) Tactical KPIs / Key Metrics Summary Review & Discussion	<input type="checkbox"/> Account Strategic Stakeholders
40%	3) Partner Account Performance Detail Review & Evaluation (Internal Scorecard) a) Long-term or Strategic KPIs / Key Metrics Review b) Short-term or Tactical KPIs / Key Metrics Review	<input type="checkbox"/> Account Tactical Execution Stakeholders
20%	4) Account Risk / Challenge / Issue Discussion a) Identified Risk / Challenge / Issue Discussion b) Risk Mitigation / Challenge or Issue Resolution Planning	<input type="checkbox"/> Account Support Roles
10%	5) Next Step Planning a) Discuss / Confirm any Account Plan Changes (Internal) b) Discuss / Confirm any Engagement Strategy Changes (External)	

Internal Partner Account Performance Review

Time	Agenda	Participants
10%	1) Review Portfolio Context a) Portfolio Focus b) Portfolio Accounts	<input type="checkbox"/> Channel Manager / Partner Account Manager
20%	2) Portfolio Performance High-Level Review a) Portfolio Total Investment vs. Portfolio Total Return b) Current Progress vs. Portfolio Goal(s) / Objective(s) c) Account by Account Summary (Engagement Strategy, Progress vs. Goal)	<input type="checkbox"/> Portfolio Stakeholders
40%	3) Portfolio Performance Detail Review & Evaluation (Portfolio Scorecard) a) Portfolio KPIs / Key Metrics Review b) Sales & Marketing Plans Execution Review c) Recruitment & Growth Plans Execution Review	<input type="checkbox"/> Portfolio Support Roles
20%	4) Portfolio Risk / Challenge / Issue Discussion a) Identified Risk / Challenge / Issue Discussion b) Risk Mitigation / Challenge or Issue Resolution Planning	
10%	5) Next Step Planning a) Discuss / Confirm any Portfolio Plan Changes b) Next Cycle Account Guidance	

Internal Portfolio Performance Review