THE RUDOW GROUP, INC.

≈ Channel Management Excellence Series ≈

Driving Partner Opportunity Management Excellence

Manager's Leader Guide

Version *20170801.1.0*

Table of Contents

PRM202 Preparation Tasks

Execute the following tasks to prepare yourself and your team for PRM202.

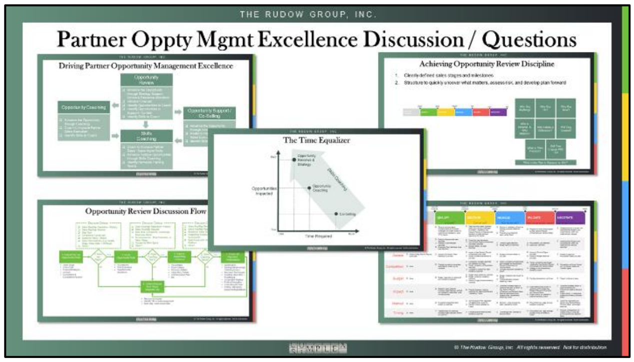
- ☐ Send email to your team with the PRM202 Launch instructions and expressing your excitement for this asset; the facilitator will provide you an email template or you can find the template on your Manager Content page at www.rudowgroup.com
- ☐ Watch (or re-watch) the PRM202 Recorded Content video to be sure you are familiar with the Driving Partner Opportunity Management Excellence content that is presented
- ☐ Attend the PRM202 Manager Prep Session (WebEx) as scheduled
- ☐ Prepare for Participant Discussion & Assignment Session (you are leading this session) and modify the slides as needed

PRM202 Discussion & Assignment Session

Purpose:	Discuss partner opportunity management excellence concepts, obstacles and strategies for overcoming obstacles; introduce partner opportunity management excellence assignment and preview coaching session.
Key Point(s):	☐ Driving partner opportunity management excellence is a skill we can all always be improving ☐ Assignment is applying opportunity management excellence concepts to live partnerships ☐ Coaching session will be a chance to improve your existing opportunity management excellence efforts in multiple partnerships
Timing:	Driving Partner Opportunity Management Excellence Content Discussion — 20 minutes Assignment Introduction and Coaching Session Preview — 10 minutes **SECTION TOTAL — 30 minutes**
Notes / Logistics:	None
File Name:	CME.Manager.PRM202Discussion&Assignment.pptx

Purpose:	Establish purpose and expected length of WebEx Session
Format:	Present
Time:	1 minute
Key Point(s):	➢ This is an opportunity to discuss and explore Driving Partner Opportunity Management Excellence ideas as we begin to focus on developing or improving the opportunity management skills of select partners ➢ This session is meant to be interactive and a discussion (not a presentation)
Notes / Logistics:	None.
Example Talk Track:	*Welcome to the Participant Discussion and Assignment session for PRM202! The purpose of this session today is for us to further explore the concept of driving opportunity management excellence with partners and then to prepare for the PRM202 Coaching Session happening within the next week or so. This session is meant to be interactive, so I'll be looking for all of you to participate in the discussions.*

Purpose:	Review agenda and discussion topics
Format:	Present
Time:	1 minute
Key Point(s):	➢ Explore driving partner opportunity management excellence concepts in more depth ➢ Discuss challenges, obstacles and strategies to address ➢ Preview the assignment for Coaching Session
Notes / Logistics:	None.
Example Talk Track:	*We're going to do three things together in this session. First I want to spend some time getting your reaction to the recorded presentation content on driving partner opportunity management excellence. I want to understand where you believe you are stong in this area and where you believe you face challenges. Second I want to discuss some of the obstacles you face in trying to drive opportunity management excellence with select partners, and as a group, strategize how we might address those challenges. And finally, I'll introduce the assignment to you for the Coaching Session and talk a little about how that session will run and what you can expect – and what I expect from you. So let's get started.*



Purpose: Drive discussion around partner opportunity management excellence concepts

Format: Discussion

Time: 10 - 15 minutes

Key Point(s):

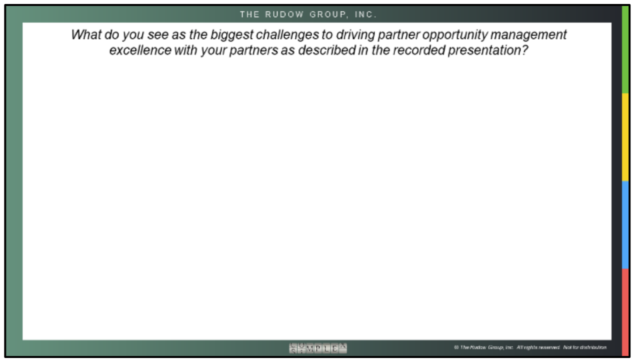
- Opportunity management is often not a strong skill set in our partners and requires our guidance and coaching
- We need to be proactive in ensuring we can elevate our partners opportunity management skills in order to drive growth
- Many partner organizations don't have the sales foundations in place to support opportunity mangement excellence
- The way I choose to run my opportunity reviews, conduct opportunity coaching and participate on co-selling activities is my primary forum to elevate my partner's skills

Notes / Logistics:

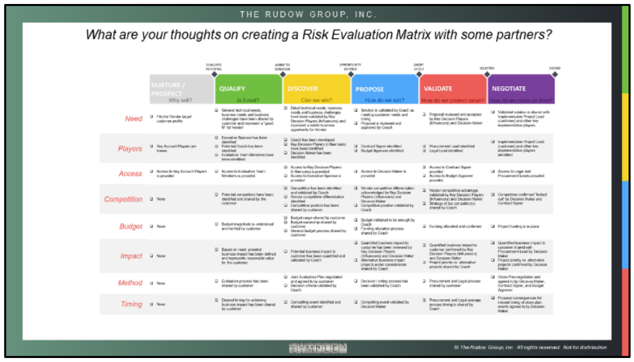
Drive a discussion with your team about partner opportunity management excellence. Your objective is to get your team members to voice some or all of the above Key Points. Use this slide to remind the participants of the key concepts in the Driving Partner Opportunity Management Excellence recorded presentation. Consider using the following questions to get the discussion started and to keep it going. Also consider calling on specific individuals rather than just leaving it open to the group

- ☐ What parts of the recorded presentation resonated particularly strongly for you?
- ☐ What parts of the recorded presentation challenged your thinking or raised a new awareness for you in terms of how you think about opportunity management?
- ☐ What experiences have you had that support what you heard in the recording?
- ☐ Which opportunity management excellence foundation elements do you find most difficult to discuss/negotiate with your partners?
- ☐ What do you find most difficult in terms of driving opportunity management skill improvement discussions with your partners?
- ☐ What strategies have you used to ensure your partner opportuntiy reviews are effective and efficient?

Example Talk Track: *None*

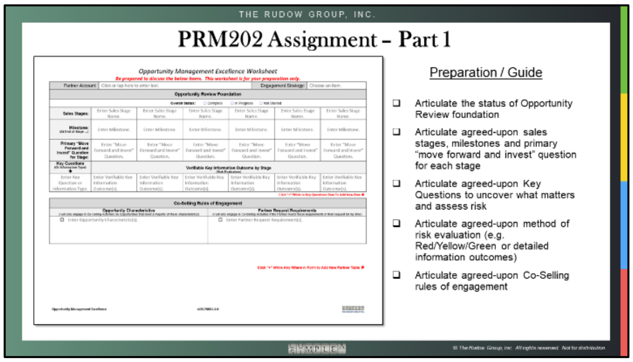


Purpose:	**OPTIONAL:** Drive discussion around the challenges associated with partner opportunity management excellence
Format:	Discussion
Time:	5 - 7 minutes
Key Point(s):	➢ Driving partner opportunity management excellence is challenging and presents many obstacles
Notes / Logistics:	If the previous slide did not generate a rich enough discussion on opportunity management excellence, you can alternately use this slide as a conversation starter. If you know how, grant the WebEx participants annotation ability and let them write summary thoughts on the screen; otherwise just use this slide as background to drive the verbal discussion.
Example Talk Track:	*None*



Purpose:	Drive discussion around the use of a risk evaluation matrix as a tool to drive better opportunity review discussions
Format:	Discussion
Time:	5 - 7 minutes
Key Point(s):	➢ An opportunity risk evaluation matrix can highlight what we know and don't know about a sales opportunity and help identify what needs to be done next to advance the opportunity
Notes / Logistics:	This risk evaluation matrix can be a critical tool to help elevate a partner sales organization's skill set. Be sure to explore how CMs might be able to get something like this in place with multiple partners.
Example Talk Track:	*None*

Purpose:	**OPTIONAL:** Drive discussion around strategies to employ in the effort to drive partner opportunity excellence.
Format:	Discussion
Time:	5 -7 minutes
Key Point(s):	➢ None
Notes / Logistics:	If the previous slide did not generate a rich enough discussion on partner opportunity management excellence, you can alternately use this slide as a conversation starter. If you know how, grant the WebEx participants annotation ability and let them write summary thoughts on the screen; otherwise just use this slide as background to drive the verbal discussion.
Example Talk Track:	*None*



Purpose: Discuss assignment and worksheet provided to assist in preparation for coaching session

Format: Present

Time: 5 minutes

Key Point(s):

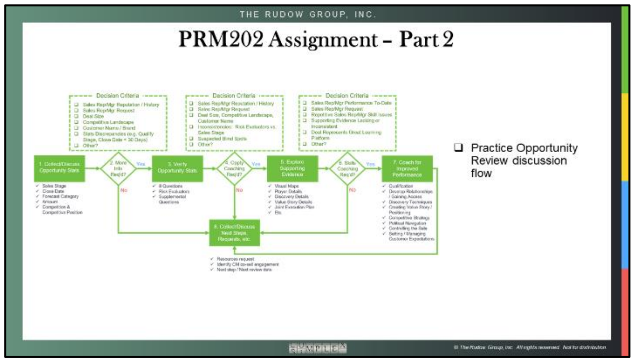
- Use worksheet as a preparation tool only
- Use worksheet to organize you thoughts and partner opportunity management excellence foundation information
- Be able to articulate the specific opportunity management excellence foundation elements you have in place with the partner
- Identify what you still need to put in place

Notes / Logistics: Worksheet Filename: PRM202.Participant.OppMgmtExcellenceWorksheet.docx

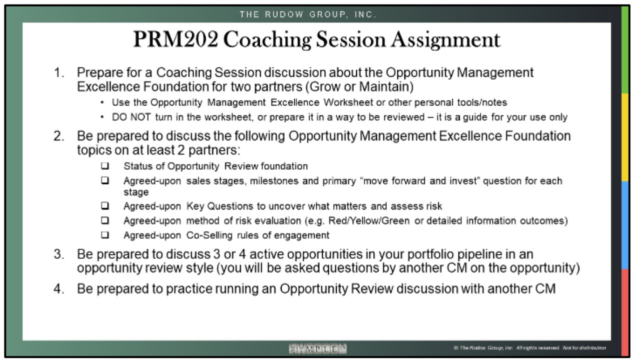
Example Talk Track:

The assignment for this asset is to begin putting opportunity management excellence foundation elements in place with at least 2 partners. To help you prepare for this discussion, there is a worksheet provided– or I can send you a copy if you did not download it. This is only meant as a tool to help you prepare the right information for our discussion – I will NOT be collecting this, so use it as you see fit. During our discussion I will be looking for five pecific things. First, your articulation of the status of opportunity management excellence with this partner. Next, the agreed upon sales stages, milestones and "move forward and invest" question for each stage. Third, the agreed upon Key Questions you'll use with this partner to uncover what matters and assess opportunity risk. Fourth, the agreed upon method to discuss and evaluate risk – for example, are you using a red/yellow/green indicator, or more detailed information checklist?. Finally, the agreed upon co-selling rules of engagement you've established.

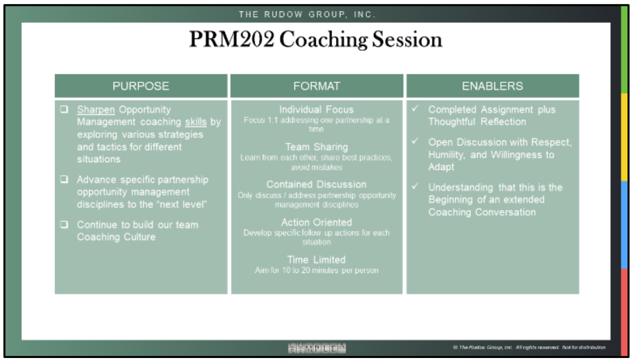
So this is how we will structure our conversation in each coaching session – whether it's in the group setting or in our 1:1 discussion. As we go through the discussion, I'll be asking questions and providing suggestions; I also encourage the rest of you to provide your thoughts and suggestions. As you can see, this will be a very targetted discussion on opportunity management excellence with select partners. While there may be lots of other things we could talk about, we are going to restrict our discussion for this exercise.



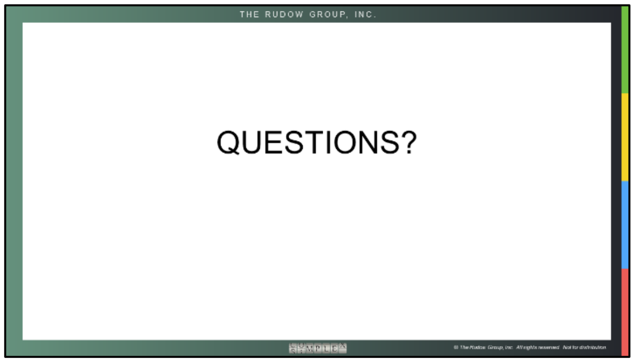
Purpose:	Discuss part 2 of the assignment in preparation for coaching session
Format:	Present
Time:	2 minutes
Key Point(s):	➢ Important to practice the opportunity review discussion flow before executing with a partner
Notes / Logistics:	Job Aid Filename: PRM202.Participant.OpportunityReviewJobAid.pdf
Example Talk Track:	*The second part of the assignment is to come prepared to practice running an opportunity review following the suggested discussion flow. This part will require you to do two things in preparation. First, come to the coaching session with 3 or 4 opportunities that are active in your portofolio so that you can respond (as if you are a partner) to an opportunity review discussion with another CM. Second, review the opportunity review discussion flowchart and be prepared to practice following it with another CM discussion their opportunities. We will likely model this discussion a few times and then let you practice with your teammates in groups of threes.*



Purpose:	Discuss details of assignment for coaching session
Format:	Present
Time:	5 minutes
Key Point(s):	➢ Prepare for coaching discussion on partner opportunity management excellence foundation elements on two partners ➢ Use worksheet to properly prepare, but leverage whatever tools you have ➢ Prepare to practice running an Opportunity Review following the suggested discusison flow
Notes / Logistics:	None
Example Talk Track:	*Your assignment then is to prepare for this coaching discussion about opportunity management excellence foundation elements on two different partners in your existing portfolio, as well as prepare to practice the Opportunity Review discussion format. All of you need to be prepared for the discussion. Go back and re-watch the recorded presentation if you need to. Use the worksheet to prepare for the coaching discussion. Remember I won't be collecting the worksheet, so just use it as you find helpful – but know that our discussion will be structured around the items in that worksheet. Feel free to bring anything you have if you think it will be relevant to our discussion. And remember what I will be looking for. These five items are the main topics I will be asking about and exploring with you in the discussion, and then we will practice the Opportunity Review discussion flow.*



Purpose:	Discuss purpose, format and enablers of PRM202 Coaching Session
Format:	Present
Time:	2 minutes
Key Point(s):	➢ Purpose of coaching session is to improve participant's skills in coaching opportunity management disciplines with partners ➢ Coaching session will be an interactive, group discussion where everyone is expected to particpate while we focus on one individual at a time ➢ Coming prepared and with the right frame of mind is critical
Notes / Logistics:	None
Example Talk Track:	*The coaching session is a critical part of our process together.* ***{CLICK}*** *The purpose of that session is to take whatever you learned doing the assignment and discuss them as a group to help everyone drive the concept into practice in our opportunity coaching and opportunity review efforts. The intent is to help you improve your skill in coaching opportunity management disciplines with your partners. I'll be working with each of you on your individual partnership opportunity management disciplines. In the process, we will not only be enhancing our coaching conversations and culture as a team, but we intend to help you advance your current partnership to a higher level.* *The format of the coaching session is going to be a bit different than other trainings we've done.* ***{CLICK}*** *This will literally be a coaching discussion, not some sort of training exercise. We will conduct this session as a group. We will have a 10 – 20 minute open coaching discussion with each of you that is very targetted on your opportunity management disciplines with a single partnership. I want to explore with you the opportunity review process currently in place and then strategize with you on specific action plans to improve that process. At the end of each Discussion I'll expect you to have a clear set of actions and next steps you are going to take to improve your opportunity management discipline with that partner.* ***{CLICK}*** *However, the only way this works is if everyone comes to the session prepared, participates in the discussion with an open mind and a willingness to adapt, and that we all agree this is just the beginning of an ongoing coaching conversation on the topic. This will be an exciting and impactful experience if we all participate fully.*



Purpose:	Solicit and answer any questions about the assignment and coaching session
Format:	Discussion
Time:	2 minutes
Key Point(s):	➢ None
Notes / Logistics:	Use this slide to solicit and answer any questions your team members may have on the assignment or upcoming coaching sessions.
Example Talk Track:	*None*

Purpose:	Close out PRM202 Participant Discussion and Assignment Session
Format:	Present
Time:	1 minute
Key Point(s):	➢ Follow up with me if you have any more questions
Notes / Logistics:	None.
Example Talk Track:	*Thank you for your attention and I'm looking forward our coaching session together! Let me know if you have any questions or concerns.*

PRM202 Coaching Session Preparation Tasks

Execute the following tasks to effectively prepare yourself and your team for the PRM202 Coaching Session.

- ☐ Send email to your team reminding them of the PRM202 Assignment (Facilitator will provide you an email template or you can find the template on your Manager Content page at www.rudowgroup.com)

PRM202 Coaching Sessions (Group & 1:1)

Use the provided Worksheet Coaching Guide and/or the below instructions to walk through each partner opportunity management excellence discussion in a structured way. Ask questions to help the channel manager arrive at their own conclusions about their partner's opportunity management excellence. Be sure to take notes as needed so that you can refer back to specific elements in future discussions, and provide feedback and suggestions as appropriate. Be sure to finish each discussion by reviewing the agreed upon actions / action plan / commitments made by the channel manager during the discussion. Finally, make some private notes to yourself after each discussion to help you direct future coaching with this channel manager.

Session Kickoff

1. **Begin Session**

Group Session

- ☐ Settle into conference room – take a seat that will allow you to coach all attendees without needing to move
- ☐ Introduce Facilitator
- ☐ Announce the order of channel managers

1:1 Session

- ☐ Meet in a location that is conducive to an account or situation discussion / coaching session; do not conduct this type of session while one or both of you are driving a car, at a partner or customer site, or in any other way unable to fully particpate in the process, take notes and speak freely.

2. **Preview how session will run**
Briefly review with the participants how the session will run and remind them that you are interested in having a coaching discussion, not just listen to them present. Emphasize that it is OK for them to not know everything as long as they have a plan on how they will find out.

Part 1: Opportunity Management Excellence Foundation Elements

1. **Discuss the Status of Opportunity Review Foundation (#1 on Coaching Guide)**

What to Say	***What to Look / Listen For***	***Key Questions***
"What is the current status of your efforts to establish an Opportunity Review foundation with this partner?"	Can he/she briefly articulate the current status of their effort to establish an opportunity review foundation?	What parts of the foundation are you still working on?

2. **Discuss the Agreed-upon (or Proposed) Sales Stages and Milestones (#2a, #2b and #2c on Coaching Guide)**

What to Say	***What to Look / Listen For***	***Key Questions***
"What are the sales stages you and this partner have agreed to use in opportunity reviews?"	Can he/she briefly articulate the discreet, clearly defined sales stages the partnership will use to monitor opportunity progress? Can he/she relate these sales stages to the official sales stages of our internal sales process?	How did you and the partner come to this agreement? How confident are you that you and the partner have the same understanding of what an opportunity "looks like" in each stage of the sales cycle?

"What are the milestones you and this partner have agreed upon that represent an opportunity is moving from one stage to the next?"	Can he/she articulate the milestones that signify an opportunity is moving from one sales stage to the next?	How did you and the partner come to this agreement?
"What is the agreed-upon primary 'move forward and invest' question for each sales stage?"	Can he/she articulate a clear question that represents the primary focus of each sales stage?	How did you and the partner come to this agreement? How will or does this question change the way the partner sales team approaches opportunity management?

3. Provide Feedback and Coaching on Sales Stages, Milestones and Primary Question

Ideally during the above discussion, but definitely before moving on to the next part of the discussion, ensure that you are satisfied with the channel manager's discussion of the sales stages, milestones and primary "move forward and invest" questions. Evaluate each of the following parts of the discussion and take the appropriate next action(s) which include creating specific actions for the channel manager to execute.

☐ **Discussion Evaluation: Sales Stages and Milestones**
The channel manager and partner have agreed on a realistic, understandable set of sales stages and milestones that will help both the CM and partner sales people consistently characterize opportunities and opportunity progress.

Poor	***Better but Room for Improvement***	***Excellent***
Help the Channel Manager understand the value of clearly defined sales stages and milestones; work together to define a set of sales stages and milestones that are representative of the types of sales opportunities the partnership pursues. *Collaborate with the Channel Manager on how to best approach the partner for this type of discussions and strategize on resources that can be leveraged to help the partner understand the value.*	*Spend a few minutes identifying which sales stages or milestones could be improved and how.*	*Move on to Verifiable Key Information Outcomes*

☐ **Discussion Evaluation: Primary "Move Forward and Invest" Questions**
The channel manager and partner have agreed on a clear question for each stage that represents the primary objective of the stage.

Poor	***Better but Room for Improvement***	***Excellent***
Help the Channel Manager develop (or refine existing) questions that represent the primary objective of each stage of the sales cycle; remind the Channel Manager that "how do we win" is not necessarily the goal of each stage of the sales cycle.	*Spend a few minutes identifying where the agreed upon questions may be confusing or less clear than desired.*	*Move on to Verifiable Key Information Outcomes*

4. Discuss the Agreed-upon (or Proposed) Key Questions (#3 on Coaching Guide)

What to Say	***What to Look / Listen For***	***Key Questions***
"What are the key questions you and the partner have agreed to use consistently to uncover what matters and assess risk on each opportunity?"	Can he/she articulate the key questions that will help both the Channel Manager and the partner sales manager/rep uncover what matters and assess risk on every opportunity? Can he/she rationalize why the chosen questions are the best questions to get at the most important elements of an opportunity and its risks?	How did you and the partner decide on the quesitons? How does each of these questions help you uncover what matters and assess the risk of an opportunity?

5. Discuss the Agreed-upon (or Proposed) Method of Risk Evaluation (#4 on Coaching Guide)

What to Say	***What to Look / Listen For***	***Key Questions***
"What method of risk evaluation have you and the partner agreed to use?"	Can he/she articulate how he/she and the partner will evaluate the risk of an individual opportunity depending on the sales stage? Can he/she articulate the specifics of how the method will be used, such as what each color (e.g. green/yellow/red) means, or who and how the list of Key Information Outcomes will be developed?	How did you and the partner decide on the method? Why did you choose this method – what reasons did you and the partner discuss? How will this method help you and the partner increase the effectiveness of opportunity management and the efficiency of opportunity reviews?

6. Provide Feedback and Coaching on Key Questions and Risk Evaluation Method

Ideally during the above discussion, but definitely before moving on to the next part of the discussion, ensure that you are satisfied with the channel manager's discussion of the opportunity review Key Questions and Risk Evaluation Method. Evaluate each of the following parts of the discussion and take the appropriate next action(s) which include creating specific actions for the channel manager to execute.

☐ **Discussion Evaluation: Key Questions and Risk Evaluation Method**
The channel manager and partner have agreed on a set of standard questions that will help uncover what matters and assess the risk of an individual opportunity; additionally the channel manager and partner have agreed on a common methos of evaluating risk in a consistent way.

Poor	***Better but Room for Improvement***	***Excellent***
Help the Channel Manager see the value of instituting some level of "science" into the art of the partner's selling by identifying questions that apply to any and every opportunity and	*Spend a few minutes identifying which key questions can be improved and how; spend additional time discussing*	*Move on to Co-Selling Rules of Engagement*

help reveal the things we know help advance opportunities. Challenge the Channel Manager identify common traits and/or information that we seem to always have in the deals we win. *Collaborate with the Channel Manager to either develop a basic set of questions, or agree to use the example set of questions from the Recorded Content for a period of time to test their effectiveness.*	*the risk evaluation method chosen and how to improve the approach.*

7. Discuss the Agreed-upon (or Proposed) Co-Selling Rules of Engagement (#5 on Coaching Guide)

What to Say	***What to Look / Listen For***	***Key Questions***
"What opportunity characteristics and partner request requirements have you and the partner agreed upon in order to secure your involvement in a sales opportunity?"	Can he/she articulate what opportunity characteristics must be present to warrant their involvement in co-selling activities? Can he/she articulate the partner request requirements that are necessary to secure his/her involvement in co-selling activities?	How did you and the partner come to this agreement? Why do these opportunity characteristics warrant your involvement in co-selling activities? How will these partner request requirements help you in prioritizing your co-selling time?

8. Provide Feedback and Coaching on Co-Selling Rules of Engagement

Ideally during the above discussion, but definitely before moving on to the next part of the discussion, ensure that you are satisfied with the channel manager's discussion of the Co-Selling Rules of Engagement. Evaluate each of the following parts of the discussion and take the appropriate next action(s) which include creating specific actions for the channel manager to execute.

☐ **Discussion Evaluation: Opportunity Characteristics**
The channel manager and partner have agreed on a list of characteristics that represent the kind of opportunity that warrants the direct co-selling involvement of the Channel Manager.

Poor	***Better but Room for Improvement***	***Excellent***
Help the Channel Manager understand why their co-selling time is limited and therefore needs to be focused on the most important opportunities. Challenge the Channel Manager to identify the kind of opportunity that would be the most appropriate in terms of leveraging their unique selling skills. Help the Channel Manager think long-term and big picture in terms of growing the partner's opportunity management skills.	*Spend a few minutes identifying missing characteristics or refining those characteristics that need more clarity.*	*Move on to Part 1: Action Plan and Next Steps*

☐ **Discussion Evaluation: Partner Request Requirements**

The channel manager and partner have agreed on a list of requirements that must be met to engage a Channel Manager in co-selling activities.

Poor	***Better but Room for Improvement***	***Excellent***
Help the Channel Manager understand the relationship between a partner putting forth effort to provide information on an opportunity vs. the importance of the opportunity to the partner (i.e. if they can't provide the information, the opportunity isn't that important). Challenge the Channel Manager to identify the minimal infomration they need to be effective in a co-selling environment.	*Spend a few minutes identifying missing requirements or refining those requirements that need more clarity.*	*Move on to Part 1: Action Plan and Next Steps*

Part 1: Action Plan Review and Next Steps

9. Review Action Plan and Confirm Channel Manager Commitment to Follow Through

What to Say	***What to Look / Listen For***	***Key Questions***
"Read back to me the action items you've taken down and when you plan to execute them."	Does the channel manager have a clear set of actions and voice a commitment to executing those actions in the immediate future?	When will you have that action completed? Who can help you on that action? What can I do to help you further on your partner opportunity management excellence efforts?

Part 2: Opportunity Review Discussion Practice

10. Model Opportunity Review Discussion

Conduct an Opportunity Review with you acting as the Channel Manager and the Channel Manager acting as the partner sales rep or manager. Use one of the opportunities the Channel Manager has brought to the session to discuss.

Be sure to work through the entire discussion flow (even if the opportunity does not obviously warrant a deeper coaching discussion), and then discuss with the team what they thought worked well and what they thought did not. Emphasize the importance of the Opportunity Reviewer controlling the conversation and keeping the Opportunity Presenter on track and on topic.

Repeat with a second Channel Manager and/or Opportunity to give all team members a chance to observe the discussion flow a second time.

11. Team Members Practice Running an Opportunity Review Discussion with Each Other

Option 1: Divide into teams of three where the three Channel Managers can take turns practicing Opportunity Review Discussions with one person as Channel Manager, one person as partner sales rep/manager, and one person as observer. Allow the teams to conduct their rounds simultaneously while you rotate from one team to another providing feedback.

Option 2: Rotate Channel Managers through positions of Channel Manager and Partner Sales Rep/Manager with remaining participants observing. Provide each Channel Manager at least one chance to run an Opportunity Review with another Channel Manager presenting one of their partner opportunities.

Observe each Opportunity Review Discussion and provide feedback after each one. Use the following to provide feedback and guidance.

Skill / Technique	***What to Look / Listen For***	***Coaching to Provide***
Limiting discussion to the question that is asked and what actually matters	Can he/she control the discussion and focus the partner sales rep/manager on “just the facts” rather than the “whole story”.	Encourage the Channel Manager to exert control in the conversation, to interupt as needed and either cut short the rambling explanation, or re-direct the discussion to the asked about topic
Using agreed upon “Key Questions” as standard questions to understand what matters and assess risk	Can he/she leverage the pre-defined/agreed-upon Key Questions to get at the core of what matters in the opportunity and assess the opportunity risk without requiring a lot of additional details?	Encourage the Channel Manager to explore using only the Key Questions and short answers to those questions to gain “just enough” understanding of the opportunity to evaluate the status, evaluate the veracity of the information, and assess the risk. Remind the Channel Manager that the more words the Partner Sales Rep/Manager uses to answer the questions, the more risk is likely present in that area.
Request and evaluate supporting evidence to support the Partner Sales Rep’s/Manager’s conclusions, rather than gain more “background” on the opportunity	Can he/she focus in on the key information provided in the supporting evidence to evaluate the veracity and logic of the Partner Sales Rep’s/Manager’s conclusions about the opportunity? Can he/she filter through the extraneous information to identify where risk exists in the opportunity and use that to provide helpful coaching to the partner sales rep/manager?	Encourage the Channel Manager to use supporting evidence as a tool for both their own conclusions and helping the Partner Sales Rep/Manager come to their own conclusions. Remind the Channel Manager to limit the discussion to only the supporting evidence that is relevant to the topic being discussed rather than hearing the “background” and other details.
Asking questions to help the partner sales rep/manager come to their own conclusions	Can he/she use the power of questions to challenge and expand the partner sales rep’s/manager’s	Encourage the Channel Manager to always ask one more question than they might normally ask.

	thinking in a way that helps them better analyze their own opportunity and draw appropriate conclusions about the opportunity and associated risk? Can he/she resist the temptation to simply provide answers or suggestions before helping the partner uncover their own answers or suggestions?	Encourage the Channel Manager to initially respond to Partner Sales Rep/Manager questions with a question of their own (e.g. respond to “What should I do?” with “What do you think you should do?”
Follow the discussion flow	Can he/she follow the recommended discussion flow, only digging into deeper details after evaluating whether it is necessary and a good use of Channel Manager time?	Encourage the Channel Manager to use the provided flow chart to manage their own discussion flow and limit the level of detail explored on opportunities that do not require further discussion

PRM202 Coaching Session Follow Up Tasks

Execute the following tasks following the coaching session.

- ☐ Send an email to all team members commenting on the progress made in the coaching session, and how you intend to incorporate opportunity management excellence discussions into your normal business and partner reviews.

The Rudow Group, Inc.
1603 Aviation Blvd., Suite E
Redondo Beach, CA 90278
+1.310.374.6448
www.rudowgroup.com