

# PartnerOptimizer

## Data Attributes and Search Filters

### Overview

PartnerOptimizer uses proprietary data mining, domain-specific reasoning tools and third party data to compile business attribute data about companies that participate in the B2B technology sales channel ecosystem.

PartnerOptimizer's search filters are designed to help users search effectively based upon business attribute terms and phrases. The search filters can be categorized into four buckets, Partner Persona, Customer Focus Insights, Competing and Adjacent Insights, and Additional Qualifications. The business attributes and related search filters within each of those buckets are described below.

### Partner Persona

The first group of search filters help the user to describe the Partner Profile , and attributes that include Partner Company Types, Solutions and Services, and Product Types.

**Partner Types** – Terms that describe how a partner company is structured, what its business model is, how it drives revenue, how it interacts with its clients, suppliers, vendors, and the rest of its ecosystem. Some sample partner types in the technology space are: Managed Services Provider (MSP), Managed Security Service Provider (MSSP), Systems Integrator (SI), Agent, IT Consultant, and Value Added Reseller (VAR). ForMarTech, common Partner Types are: PR Agency, Ad Agency, Graphic Design Firm, Marketing Agency, Social Media Marketing, and SEO Company.

**Solutions & Services** –Terms that describe the services and solutions a partner company have expertise in, market and sell. Understanding this search filter will give you distinct insights into whether or not certain partners will sell or use your product, how it will do so, and what they will expect from you in the way of support, pricing, margins, and client control/ownership (who is billing and supporting the client).

**Product Types** – Terms that describe the products a partner company may sell to their clients or utilize within their services and solutions they are providing to their clients (part of the solutions/services stack). Again, this will give you clues as to how a partner will want to work with you to sell, consume or use your product. You will also better understand if this partner has expertise and client base for your product if they are selling competing or adjacent products and services.

## Customer Focus Insights

Customer Focus Search Filters help the user search for partners based on the types of customers or clients that they work with. Having this information provides insights about whether the partner company is aligned with the customers/market that your products are sold into. Each of the related search filters is described below:

**Vertical Markets** – Vertical markets typical have their own vernacular, regulatory compliance, security requirements and methods of conducting business. Knowing which vertical markets your resellers and reseller leads/prospects service will help you understand the skill sets, expertise and product selections they will make. From a prospect perspective you will be able to hyper-target resellers with the right case studies and language to increase the effectiveness of reseller acquisition and activation. Verticals are your typical government defined: Healthcare, Financial, Insurance, etc. However, you may find sub-verticals are useful like Healthcare > Dentistry.

**NAICS Codes** - A NAICS (pronounced NAKES) Code is a classification within the North American Industry Classification System. The NAICS System was developed for use by Federal Statistical Agencies for the collection, analysis and publication of statistical data related to the US Economy. It was adopted in 1997 to replace the Standard Industrial Classification (SIC) system in cooperation with the statistical agencies of Canada and Mexico. Their goal was to establish a North American standard. They developed the NAICS as the first economic classification system based on a single economic concept. Within PartnerOptimizer, we've mapped out some of the most common NAICS codes to accommodate our customers' martech integration requirements and marketing strategic initiatives. While most channel partners do not self-identify what their NAICS code is, we map the NAICS code to the vertical markets that a channel partner is focused on. You will see overlap with the Vertical Markets filter.

**Customer Sizes** – Terms that describe the size of a partner's typical customer. The size of your ideal customer has an enormous impact on the ideal profile of partner companies that you work with. If your ideal customer is an enterprise sized company, your channel partners must have the right business model to engage them, team to support their needs, etc.

**Customer Types** – Terms that enable you to identify if a partner company works with entities within a corporate structure that has specific regulatory requirements, tax implications, qualifies for special funding structures, etc. For example a non-profit, an educational institution, NGOs, a publicly traded company, a government funded company, etc.

**Countries or States Mentioned** – Terms to describe where a partner company is likely to be doing business. Process, and pricing may be drastically different and requires the need to adjust accordingly for each location.

## Competing & Adjacent Insights

Understanding the competitive and adjacent vendor and product landscape is extremely important to reseller recruitment, activation and enablement.

**Competing Vendors/Product Names** – When a partner company is actively working with or knowledgeable about solutions and companies that compete with yours they are more likely to have customers for your product and have expertise in selling and working with products in your category.

**Adjacent Vendors/Products** – When a partner company is actively working with or knowledgeable about solutions and companies that are synergistic (adjacent) with yours they are more likely to have customers for your product and have expertise in selling and working with products in your category.

**Company/Product Names (Misc.)** – Use these filters to find partner companies that may be talking about your products and solutions already. You may also consider using this to find partner companies associated with companies or products which could add insight about their customer base and expertise, which might be relevant to yours.

## Additional Qualifications

These search filters provide the user with an understanding of what additional expertise and qualifications the reseller carries. It can also give you a better understanding of the types of ecosystems/clients the reseller will be involved with or selling to. The search filters are further explained below:

**Compliances** – Terms associated with compliance that may reveal additional expertise about a partner company and the customer it services. Compliance trained staff is expensive and the investment is only made if the reseller has the need. Examples: HIPAA, and GDPR, HL7.

**Partner Programs & Tiers** – These terms can tell you which vendor channel partner programs a reseller is participating in and/or associated with in a direct or indirect way. Beyond face value, participation in a partner program might provide insights such as: a company's commitment to a vendor or product group; a company's size success (for example, if they are a Microsoft Gold Partner they must qualify based upon sales and transaction milestones). It can also indicate if the company has the right skill set to work with your product.

**Certifications** – Terms like these can provide you with insight into areas of expertise within a channel partner's organization. For example certain certifications are particularly indicative of skillsets and expertise in cybersecurity, healthcare, six sigma, project management, etc.