

Building the Business Case for a Partner Performance Dashboard

Drive partner success with data, metrics, and
actionable insights

Background to this eBook

- In this complementary eBook, we share insights, key takeaways and strategic guidance on how to build the business case for implementing a Partner Performance Dashboard. We delve deep into:
 - Key reasons to implement a Partner Performance Dashboard
 - Effective metrics for measuring partner success
 - Overcoming common challenges
 - Building the business case
 - Real World Insights: Juniper's journey to data-driven partnering
- The research and insights contained in this eBook were drawn from a panel discussion and webinar poll focused on data-driven partnering (2024). The discussions centered around the theme of: "How to Drive Partner Success with Data, Metrics and Actionable Insights".

The panel featured senior partnering executives:

- **Don Lopes**, Snr Director, Global Partner Programs at Juniper Networks
- **John Andrews**, VP Global Channels
- **Kenneth Fox**, Chief Executive Officer, Channelscaler
- **Margaret Adam**, Director of Product Marketing, Channelscaler

By polling the audience of 75 vendors across multiple countries, we were able to capture new insights into the benefits and challenges associated with adopting a data-driven approach to partner management and Partner Performance Dashboards.

If you'd like to know more, please contact: [Brenda O'Sullivan](#)

What is a Partner Performance Dashboard?

A Partner Performance Dashboard (PPD) is a comprehensive data visualization solution that provides real-time insights into partner performance, engagement, and impact.

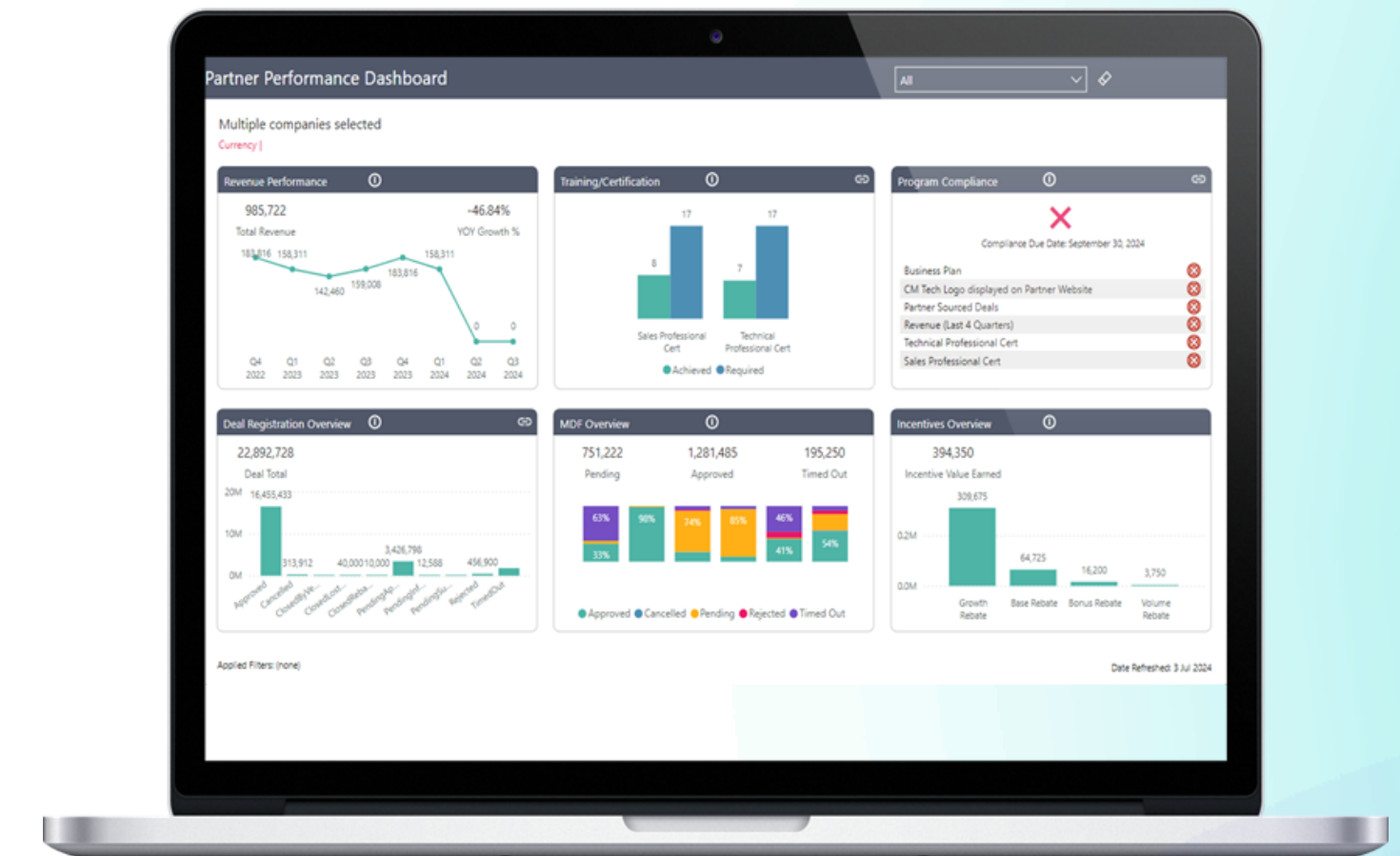
It serves as a single source of truth for partner-related data, consolidating information from various systems and sources into an easily digestible format.

Whilst different companies may measure different metrics, Partner Performance Dashboards typically include:

- Data visualizations of performance against key success metrics
- Drill-down capabilities for deeper insights into specific data points
- Integration with existing CRM, PRM, LMS and other systems
- Performance trends and, in cases, predictive forecasts

These dashboards are primarily used by channel leaders to assess performance and trends within the partner ecosystem, while partner account managers use them to explore detailed analytics for individual partners.

Top Tip: Develop a version of the dashboard accessible to partners through their portal, creating a unified, single source of truth for both you, and your partners.



John Andrews,
VP Global Channels

“Moving to a data driven approach, using partner dashboards, takes you from reactive to proactive channel management.”



4 Steps to Building the Business Case for a Partner Performance Dashboard

1

Identify Key Benefits & Business Outcomes

2

Determine Key Metrics for Partner Success

3

Mitigate Potential Obstacles & Challenges

4

Develop The Business Case

1. Identify Key Benefits and Business Outcomes

The first step is to outline the advantages of implementing a Partner Performance Dashboard (PPD).

- **Enhanced Visibility on Partner Performance and Impact:** Having a trusted view of partner performance across key metrics and KPIs means you can easily assess how partners are performing. This is by far the most common reason for implementing a PPD, with 98% of those polled citing this as the primary driver behind their decision to implement one.
- **Enhanced Transparency:** Nearly 7 in 10 companies implemented a PPD to increase visibility into their channels' contributions to the business. Ensure partner activities align with overall company goals. A key motivator is the ability to effectively respond to questions from leadership, like: *"What is the channel doing for us?"*
- **Data-Driven Decisions:** The ability to make informed decisions based on accurate partner data rather than gut-feel and instinct. Identify top-performing partners as well as areas requiring additional support to help decide where to allocate investment and resources to. Two thirds of respondents implemented a PPD to help them easily identify areas of improvement.

- **Improved Partner Management and Reporting:**
Provide partners with clear insights into their performance and areas for improvement. Partner Managers benefit from more efficient reporting, dramatically reducing time spent on manual data collection for planning and quarterly business reviews (QBRs). This was a key business case justification for close to 60% of respondents.

Top Tip: Engage stakeholders early in the process. Collaborate with sales, revenue operations, partner operations, marketing and partner teams to understand how a PPD could benefit them and use this in your business case proposal.

Key reasons for implementing a Partner Performance Dashboard (PPD)

98% Track & analyze partner performance, engagement & impact

75% Helping to identify areas of improvement

70% Creating more transparency on channel's contribution

59% More efficient partner QBR's with a single source of truth

30% Enabling PAMs to become more sales oriented

2. Determine Key Metrics for Partner Success

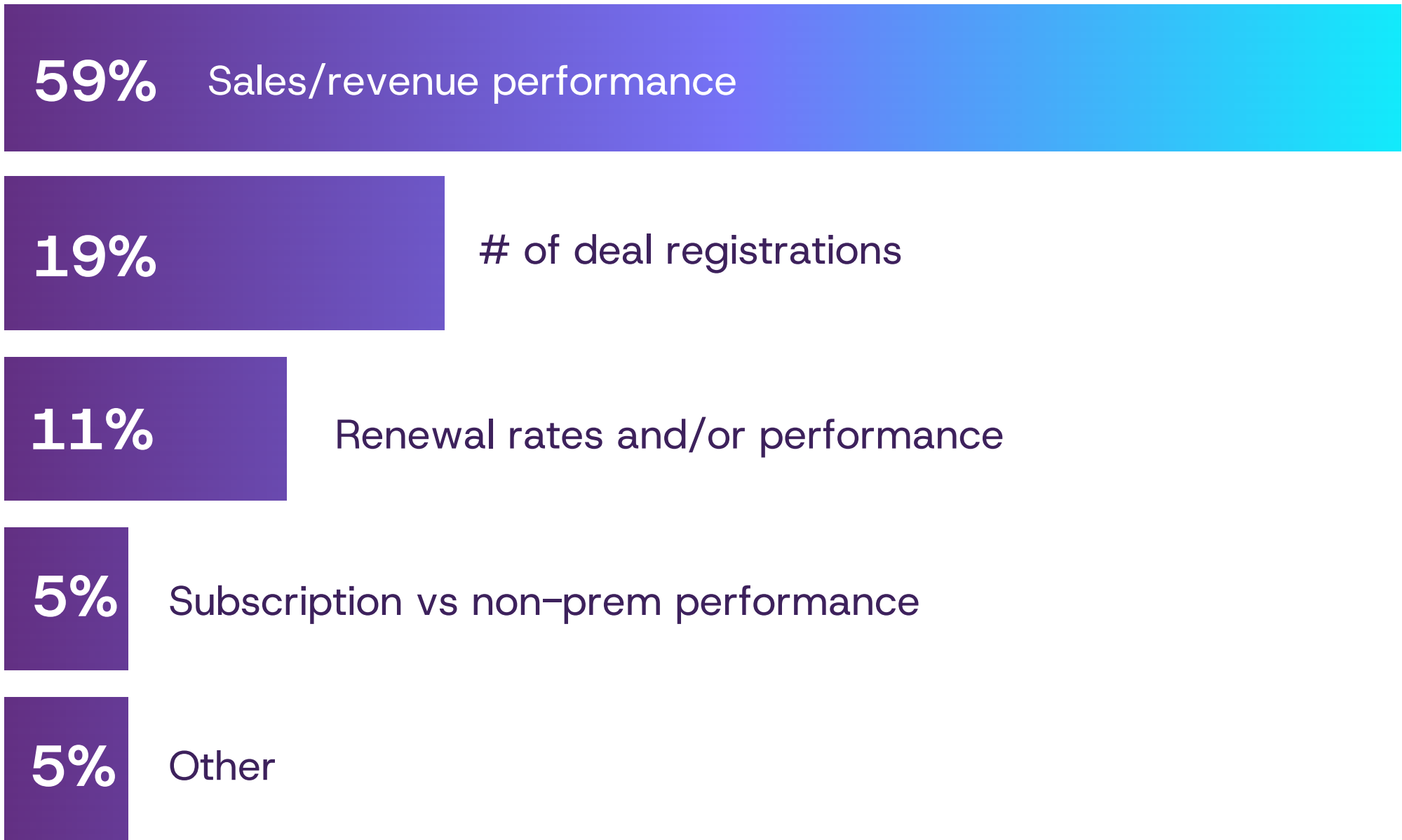
Before implementing a PPD, it's crucial to be thoughtful about what metrics will provide a comprehensive view of partner performance and that are aligned to your business objectives. Consider for example metrics like:

Revenue	Pipeline	Engagement	Customer Success	Partner Profitability	Products & Services
Total revenue	# of deal registrations	Training & certifications	Renewal rates	Incentives & rebates earned	Subscription vs On-Premise sales
Year-over-year growth	Conversion rates (register to close)	MDF utilization	CSAT scores	Discounts & margin analysis	# of demos & POCs
Average deal size	Pipeline value & velocity	Partner portal log-in/ content usage	Upsell & cross-sell performance	Partner marketing ROI	Service/ product attach rates

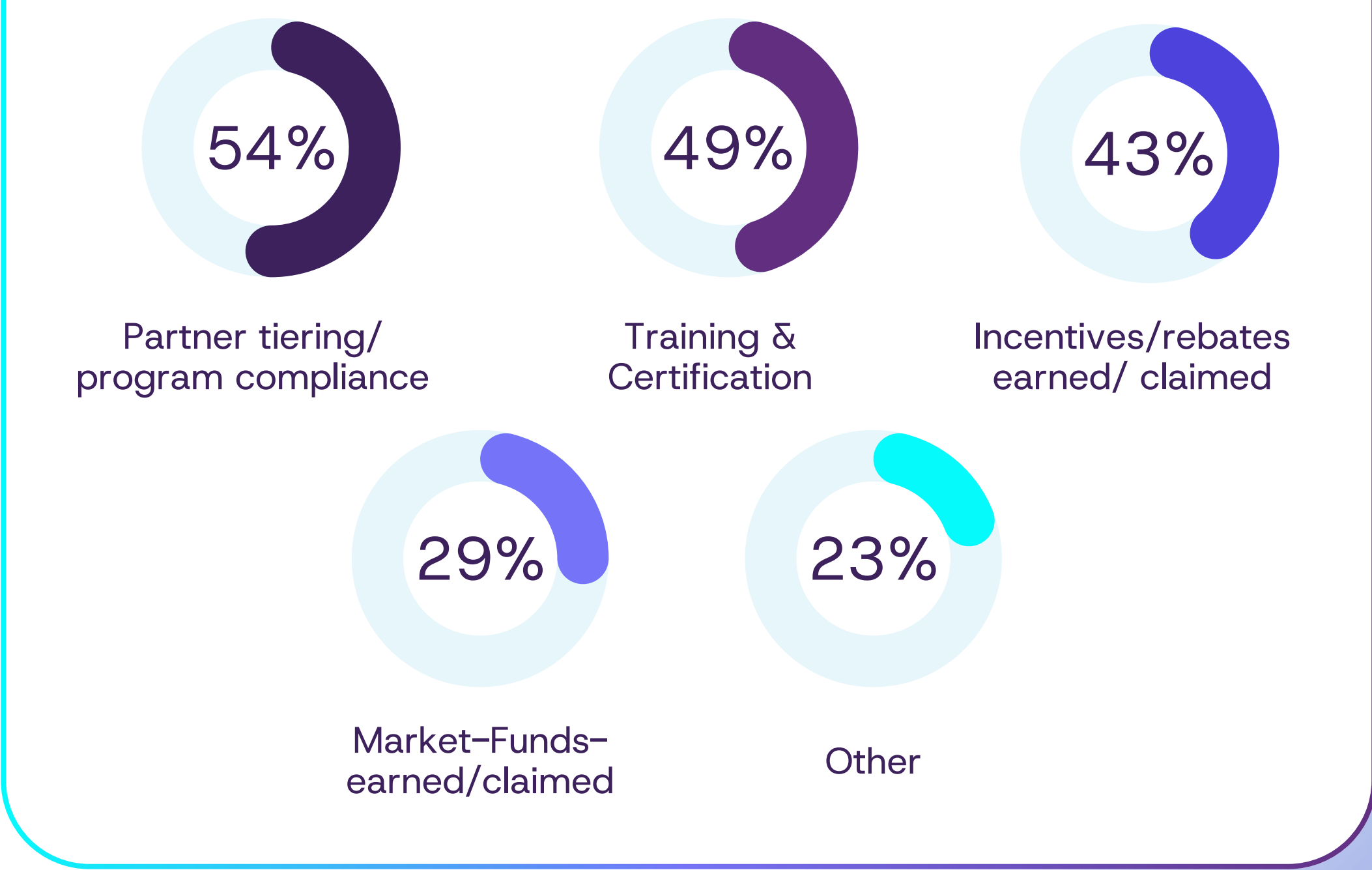
Top Tip: Don't be overwhelmed by the task of gathering data for all metrics at once. Most companies develop their dashboards gradually. Start with one or two metrics where you already have reliable data, and then expand as new data sources become available.

Typically, we see a mix of both sales and partner program metrics.

Key sales metrics measured in a Partner Performance Dashboard (PPD)



Key partner program metrics prioritized in a Partner Performance Dashboard (PPD)





**Don Lopes,
Snr Director, Global Partner Programs,
Juniper Networks**

“Think about how to support partners across a wide range of different shapes and sizes and roles with customers. How do you give them the right intelligence, the right support and the right performance to be able to drive profitability?”



**Kenneth Fox,
CEO, Channelscaler**

"It's almost like a Quarterly Business Review (QBR) on the fly. It's a QBR running in real time, which makes your partners' life that much easier."

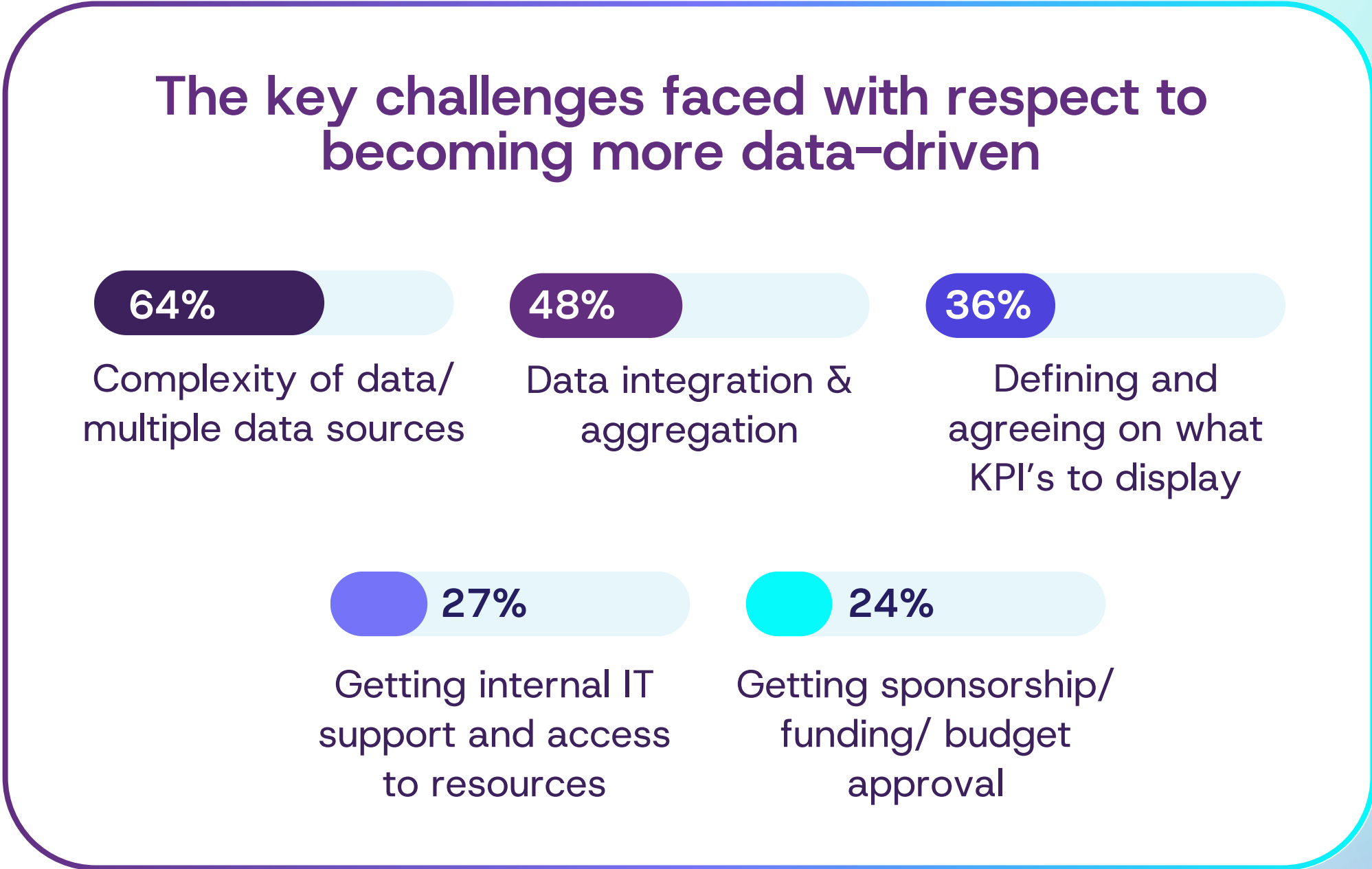
3. Mitigate Potential Obstacles and Challenges

When implementing a Partner Performance Dashboard, several challenges commonly arise. When building the business case, show that you have thought through potential challenges and solutions. By outlining potential hurdles, you demonstrate a thorough understanding of the project and your readiness to address issues as they arise.

Here's some guidance on how to address them effectively, leveraging insights from the industry experts on our panel:

- **Complexity of Data (64%):** Partner data is complex and managing multiple data sources is the biggest challenge. Kenneth Fox emphasizes the value of working in partnership with a PPD specialist like Channelscaler. *"We've developed a good process to simplify data management, making it less daunting than it seems."* Focus on prioritizing only essential data streams and using integration tools that consolidate information efficiently.
- **Data Integration and Aggregation (48%):** Integrating multiple sources of data is also complex. This can also be overcome by partnering with a specialist provider like Channelscaler, that has optimized connectors to common CRM and PRM systems. Kenneth notes, *"Getting data and integrating it is not as hard as it used to be. Start with basic data feeds and expand as needed."*

- **Defining Relevant KPIs (36%):** Collaborate with stakeholders across sales, marketing, and partner management to identify KPIs that align with overall business objectives. Kenneth advises starting small: *"Begin with the most important three or four KPIs. You can always add more as you refine your strategy."*
- **Internal IT Support (27%):** Engage IT early in the process to ensure they understand the strategic importance of the dashboard. Highlight how it will streamline operations and reduce manual workload. Don Lopes suggests leveraging partner feedback to gain internal support: *"Use partner conversations to stimulate excitement and compel action."*
- **Securing Sponsorship and Budget Approval (24%):** Build a compelling case by demonstrating potential time savings and ROI. John Andrews recommends gaining consensus across departments: *"If you can get buy-in from sales, customer success, and other key stakeholders, it's far easier to secure approval from executives."*



4. Develop the Business Case

Build a compelling argument to secure buy-in and funding:

- **Demonstrate Efficiency Gains:** Calculate hours saved by consolidating data sources. Highlight the inefficiencies of current systems where account managers spend excessive time accessing multiple platforms. By consolidating data into a single dashboard, significant time savings can be achieved, which translates into cost savings. For example: *"By implementing a PPD, we estimate saving 20 hours per week."*
- **Demonstrate ROI:** Show how improved visibility impacts revenue. For example: *"A 5% improvement in deal registration conversion could add \$2 million in revenue."*
- **Align with Strategic Goals:** Tie the PPD to business objectives. For example: *"The PPD supports our goal of increasing channel contribution to 60% of total revenue."*

Kenneth Fox,
CEO, Channelscaler

"There's so many different ways to do this. One customer we worked with added up how many hours a week they spent going to multiple systems to get data. Their PPD was actually paying for itself in less than three quarters."



- **Highlight Competitive Advantage:** Differentiate your program from competitors. For example: *"Implementing a PPD makes us a vendor that is easy to do business with."*
- **Leverage Partner Feedback:** Use feedback from partners to demonstrate the demand and necessity for a PPD. If partners express difficulty in accessing and understanding their performance data, this can be a compelling argument for investment.
- **Get Creative about Budgeting:** Identify opportunities to reallocate budget from other areas. For instance, renegotiating contracts with other vendors can free up funds for the PPD.

Don Lopes,
Snr Director, Global Partner Programs,
Juniper Networks

"Leverage that voice to generate some excitement and compelling action."

"We made a change in one tool, and we created some efficiencies and budget there that allowed us to then use funding to easily do this."



Real World Lessons: The Juniper Networks Journey

Juniper Networks provides a compelling example of how to effectively implement a Partner Performance Dashboard (PPD). During the panel discussion, Don Lopes shared Juniper's experiences implementing a PPD in partnership with Channelscaler.

Here's five key lessons learned along the way:

1.Simplification: Juniper aimed to streamline partner interactions by consolidating various data points into a single, user-friendly dashboard. Don Lopes noted, *"We saw it as a great way for us to bring simplification to our partners."* This approach reduced complexity and made it easier for partners to access essential information.

2.Rapid Implementation: Juniper successfully implemented their PPD within 4–6 weeks, a timeline significantly shorter than overhauling multiple individual systems would have required. The PPD solved the challenge of multiple sources of data. This quick deployment allowed them to respond swiftly to market demands and partner needs.

3.Addressing Gaps: The dashboard helped Juniper identify and close critical gaps in their partner engagement strategy. As Lopes explained, *"We closed some really important gaps. Prior to this, we didn't make it easy for partners to really know their performance."* By centralizing data, they improved transparency and communication.

4.Iterative Improvement: Juniper adopted an iterative approach, starting with basic metrics and gradually incorporating more sophisticated KPIs and features. This allowed them to refine the dashboard based on real-world feedback from partners and evolving business needs.

5.Driving Adoption: To ensure widespread use of the PPD, Juniper integrated it into their Quarterly Business Review (QBR) process. This encouraged partners to engage with the dashboard regularly, demonstrating its value in tracking performance and planning future activities. By focusing on simplification, rapid deployment, and continuous improvement, Juniper successfully leveraged their Partner Performance Dashboard to enhance partner relationships and drive business growth.

Final Words of Advice



Don Lopes
Snr Director, Global Partner Programs

Metrics Matter

"We're here to drive sales, and that's the key thing we want to be able to use as our pillar. When we look at metrics and work with our partners, it's about how we develop the right consistency of metrics that allows them to achieve their goals in the right way."



John Andrews
VP Global Channels

Build Consensus

"If you can get buy-in from sales, customer success, and other key stakeholders, it's far easier to secure approval from executives. Get the buy-in of the sales organization, their VPs, your CRO, ensuring they understand the benefits of say measuring net-new incremental pipeline. It is then far easier to take that conversation up to a CFO or a CEO."



Kenneth Fox
CEO, Channelscaler

Start Small, Start Now

"Just do it! Start with maybe the most important three or four KPIs. And you can always add to that later, because remember, that's a significantly better experience for your partners than you have today on your spreadsheets."

Additional Resources



eBook:

Driving ROI through effective Channel Partner Renewals



eBook:

Unlock the Power of Joint Partner Business Planning with Automation



eBook:

Building the Business Case for Partner Relationship Management (PRM) in 10 Steps



eBook:

Partner Journey Excellence:



eBook:

Utilizing Partner Performance Dashboard to Build a Stronger Partner Ecosystem

A data led approach to analyzing, managing, and optimizing your partner ecosystem



eBook:

A Guide to Partner Leveling (Tiering) Programs in 2025



eBook:

What's Happening with MDF in 2024



eBook:

Everything you need to know about partner incentives 2024

In a competitive partner ecosystem, **ease of doing business** is everything. Channelscaler empowers you to scale with confidence, win partner mindshare and grow revenue with clarity and control.

[Schedule a Demo](#)



www.channelscaler.com



AppExchange Program
PARTNER

