Entitlement Management Through the Channel

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What is a **Channel Strategy**?

A channel strategy is a vendor's plan for moving a products and services through the chain of commerce to the end customer.
Common Sales Channels

Direct
Vendor sells directly to the end customer

Vendor → End Customer

Reseller
Vendor sells to reseller who sells to the end customer

Vendor → Reseller
Reseller → End Customer

Multi-tier
Vendor sells to distributor who sells to reseller who sells to the end customer

Vendor → Distributor
Distributor → Reseller
Reseller → End Customer

Inventory stocking
This model becomes increasingly challenging when the vendor delivers software that requires license activation.
What We Hear from Vendors

My Distributors…
- Need a way to stock software licenses bought in bulk
- Sell pieces of their license inventory to their partners and customers
- Need a view across resellers and end customers

My Resellers…
- Need a way to stock software licenses bought in bulk from Distributors
- Sell pieces of their license inventory to their partners and customers
- Manage customer licenses
- View across customers

Vendor

Distributor

Reseller

Reseller

Reseller

End Customers

End Customers

End Customers
Gemalto Lessons Learned

- Every vendor’s channel model is different
- Gemalto must offer flexibility
- Understanding the channel data model is huge
- Vendor must make policy decisions upfront
  - Workflow Rules: Can partners stock software and transfer?
  - Visibility Rules: Who gets to see what?
  - Entity management: Can partners create customers?
Channel Data Model

- Define Portal Workflow Rules
- Define Portal Visibility Rules
- Define Entity Management Rules

Vendor

Distributor

Reseller 1
- Reseller 1 User 1
- Reseller 1 User 2

Reseller 2
- Reseller 2 User 5
- Reseller 2 User 6

Customer 1
- User A
- User B

Customer 2
- User C
- User D

Customer 3
- User E
- User F
As a channel partner, I need to...

1. Manage my software inventory and transfer licenses to my downstream Partners or customers after I make a sale

2. View my customer base

3. View a specific customer at the *company* level

4. Search for companies, contacts, entitlements, orders, etc.

5. Service my customer: Download software, activate and revoke
EMS Enterprise – Channel Support

- **Not New:** EMS has native support for channel partners
  - EMS entitlements can support up to 5 channel partners
  - Entitlement splitting and transfer
  - Channel functions can be accessed via web services

- **NEW:** The Enhanced Partner Portal will be available Dec 2016
  - Addresses market need for channel workflows and views
  - Approach similar to the Enhanced Customer Portal
  - PS offering
  - Offers a fresh, clean user experience
  - Portal uses EMS 4.1 web services and is customizable
### Channel Partner View Across Customers

#### Customer Inventory

- All entitlement items across customers
- Drill into specific orders
- Drill into specific customers
- All views exportable

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Channel Partner **View of a Specific Customer**

- View software licenses
- Activate software licenses
- Download software
- License Activations
- Device view
- Email license files
Channel Partner Transact Against an Order

Transact

• Activate licenses
• Download software
• Transfer licenses
• Split licenses
• Email license files
Channel Partner Split and Transfer Licenses

- Specify recipient
- Specify products and quantities
- Creates new entitlement
- Notifies recipient
Channel Partner Search

Search Entitlements

• By end customer
• By order
• By contact
• By product
• By date range