Ecosystem Orchestration
Success with 360insights

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This white paper is designed for anyone considering implementing or actively working with the 360insights Ecosystem Success Platform.

The goal is to help orientate the reader around the key principles and considerations related to ecosystem orchestration success. This includes an overview of the critical path and best practices approach developed by 360insights and its ecosystem partners.

What is Ecosystem Orchestration?

Your organization has an ecosystem of employees, clients, partners, influencers, and other key stakeholders who can all contribute to your company's success.

Traditionally, ecosystems have been supported through utilization of various applications and user centric portals. These have generally been focused on the different needs of different users in silos — for example, an intranet for your employees, a PRM portal for partners and channel teams, a website login area for your customers and so on.

As cloud software and services have continued to proliferate at an astonishing rate, enterprise architectures have become increasingly complex and fragmented, with multiple apps and content sources now in play across all ecosystem user types.

Ecosystem orchestration is about effectively embracing this new reality and supporting the varying needs of your different ecosystem members in a cohesive, coordinated and highly scalable way.

As organizational strategies move increasingly towards ecosystem-first growth and scale, enterprises that can more effectively orchestrate their ecosystems to maximize outcomes will have a significant competitive advantage. This is particularly true in a climate of diminishing returns on investments in direct sales, marketing, and customer success initiatives.

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How is this different from Channel Partner Relationship Management?

An ecosystem and an indirect channel are two distinct concepts in the business world, each with unique characteristics and implications.

An ecosystem refers to a complex network of interconnected organizations, partners, customers, suppliers, and other stakeholders collaborating to create value and deliver comprehensive solutions. It represents a dynamic and interdependent system where multiple entities work together to achieve common goals.

> *The focus is on creating an environment where all participants can thrive and benefit from the collective value creation.*

In an ecosystem, companies form strategic partnerships and collaborate to leverage each other's strengths, resources, and capabilities. The focus is on creating an environment where all participants can thrive and benefit from the collective value creation. Ecosystems often involve collaboration in areas such as product development, distribution, marketing, and customer support. Examples of successful ecosystems include tech giants like Google, Salesforce, and HubSpot, who have built extensive networks of partners and developers to offer a wide range of products, services, and platforms.

A channel is a component of the overall ecosystem, serving as a distribution pathway through which products, services, or information flow from a business to the end customers. While channels can take various forms, such as direct sales, retail stores, online marketplaces, or reseller networks, they play a critical role in reaching and engaging with target audiences. Channels within an ecosystem are not standalone entities but are integrated into a broader network of collaborators, where multiple partners work together to deliver value to customers.

SIMILARITIES

Similarities Between Ecosystems and Indirect Channels:

- Both involve collaboration and partnerships.
- Both aim to leverage the strengths and resources of multiple entities.
- Both require effective coordination and communication among participants.

DIFFERENCES

Differences Between Ecosystems and Indirect Channels:

- Ecosystems are broader and encompass a network of interconnected organizations, while indirect channels focus on specific distribution channels.
- Channels are a component of a larger ecosystem.
- Ecosystems aim to create value through collective collaboration, while indirect channels primarily extend market reach.
- Ecosystems involve diverse stakeholders, including partners, suppliers, and customers, whereas indirect channels involve intermediaries between the manufacturer and the end consumer.
- Ecosystems foster innovation and enable a broader range of offerings, while indirect channels focus on distribution and sales.
- Ecosystems require a more strategic and long-term approach, while indirect channels often involve contractual or transactional relationships.

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Why does this matter?

The evolution of indirect channels into ecosystems is a significant development that businesses need to grasp. Here are some reasons why understanding this shift is important:

- **Increased Collaboration.** Ecosystems enable businesses to collaborate with partners beyond traditional boundaries. By leveraging the strengths of different ecosystem partners, businesses can access new markets, reach a wider audience, and offer more comprehensive solutions and customer support.

- **Enhanced Innovation.** Ecosystems foster innovation through collaboration and knowledge-sharing among partners. By participating in an ecosystem, businesses can leverage the expertise, resources, and ideas of other ecosystem members to drive innovation and stay ahead of the competition.

- **Improved Customer Experience.** Ecosystems allow for the seamless integration of products, services, and experiences, resulting in a more holistic and streamlined customer journey. By understanding the evolution of indirect channels into ecosystems, businesses can design customer-centric experiences that span multiple touchpoints and deliver added value.

- **Competitive Advantage.** Businesses that embrace the ecosystem approach can differentiate themselves from their competitors. By building strong partnerships and leveraging the collective strengths of the ecosystem, businesses can offer unique solutions and experiences that are difficult for others to replicate.

- **Ability to Scale Faster with Less Resources.** Embracing ecosystems allows businesses to scale more efficiently and effectively. In today's business landscape, where organizations are increasingly asked to do more with less, scaling through ecosystems offers a compelling advantage. By leveraging partnerships and outsourcing deliverables and costs to ecosystem partners, businesses can grow their operations while minimizing direct costs.

The Importance of Ecosystem Orchestration

Ecosystem orchestration plays a crucial role in today's interconnected business landscape. Think of it like an orchestra. Just as an orchestra brings together talented musicians playing different instruments to create a harmonious symphony, ecosystem orchestration involves strategically managing and coordinating diverse stakeholders such as partners, suppliers, customers, and communities. By conducting this intricate network of relationships and resources, organizations can maximize the potential of their ecosystem, drive collaboration, and create mutual value for all participants involved. Effective ecosystem orchestration aligns the various elements to achieve a unified vision and propel collective success in the dynamic marketplace.

Motivating and incentivizing ecosystem behavior is an essential aspect of ecosystem orchestration. As different players within the ecosystem come together, it becomes crucial to encourage desired behaviors that contribute to the overall success of the ecosystem. By providing incentives and rewards that align with shared goals, organizations can foster engagement and active participation from ecosystem members.

Incentives for partners also encourage innovation and continuous improvement. It creates a sense of shared purpose and ensures that all participants are actively involved in driving the ecosystem forward. With effective motivation and incentives, organizations can create a thriving ecosystem that consistently delivers value and drives sustainable growth for all stakeholders involved.

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Key Principles of Ecosystem Orchestration

For a business ecosystem to thrive, you need simplicity and scale of adoption. Look to the consumer world to mimic what is working there. Find an aspirational model on which to construct a successful business ecosystem of your own. Social community platforms are a great example. These platforms create value through adoption, they monetize it through monthly active users, and yet most of their content is created and consumed by the ecosystem members themselves (not the platform owners).

How does the B2B community replicate this success? By establishing a similar framework that can foster and enable the curation of content while creating conditions for the community (ecosystem) to thrive through digital engagement.

Key to achieving this aim is the creation of experiences relevant to different user personas based on who they are, what they need at any given moment, their interests, and how they prefer to consume information.

Change your perspective on the origination (and destination) of tools, systems, and content to think more about the needs of your ecosystem consumers — such as meeting the supply to their digital demand.

Ecosystem Supply and Demand

Resources (namely types of content, tools and applications) are used by individuals for specific activities. However, if those individuals have no need (demand) for certain resources, then the value of the engagement with such resources and the system delivering them is diminished.
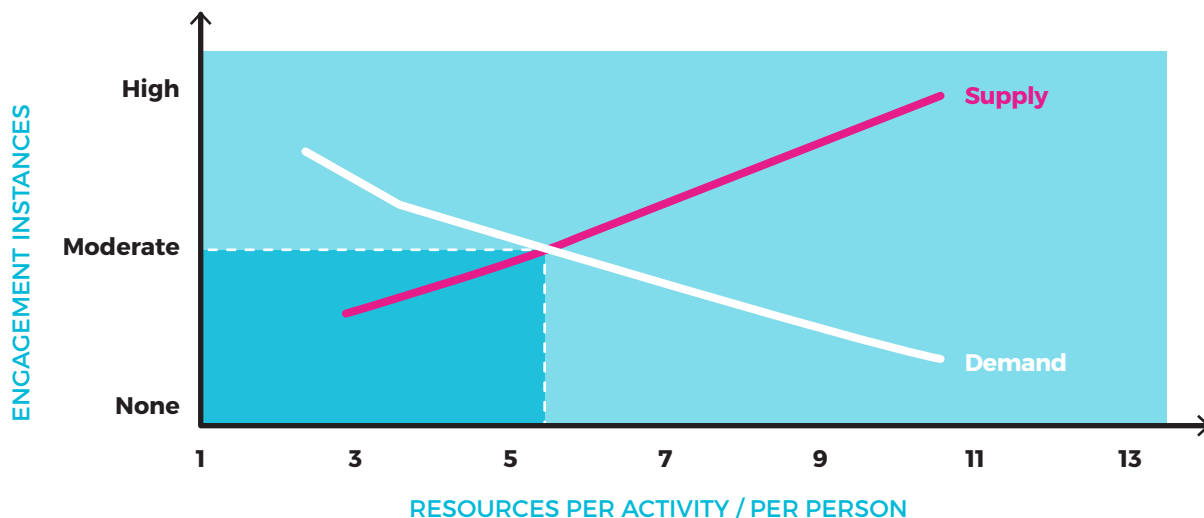
Similarly, if the demand for certain resources is high, and their supply is limited, there will potentially be a detrimental impact to the outcome of the activity. If the demand for certain types of resources remains unsatisfied, the individual requiring them will likely seek another avenue where their demand can be adequately met.

To achieve optimal engagement value, it is essential to strike an equilibrium between the resources supplied and the demand individuals involved in specific activities have for those resources. When the supply of the right resources at the right time meets the demand for such resources, the value of engagement increases and a personalized, contextual experience is achieved.

Ecosystem orchestration thrives through empowering and enabling key stakeholders within your organization to support the specific needs of your ecosystem members at a highly personalized level. If you can enable the effective management of this supply and demand on a large scale, you have the potential to revolutionize the way the organization operates and create business'impacting outcomes in the process.

Planning for Success

Enabling and fostering engagement within a business ecosystem is hard work. It forces you to think about all the relationships that intersect and interact to drive your business forward. But with a bit of forethought, every company can develop a framework that will help get the most out of every relationship that touches their business. It is a numbers game, and if you can trigger even a base level of participation from many members, you will find the initial effort will pay off with dividends.

Define your Priorities

One of the biggest opportunities in ecosystem orchestration is also one of the biggest challenges: with so many potential areas of focus, how can you ensure that you focus on the priorities that will bring the biggest return on your investments?

Like most complex challenges, the best place to start is at the highest level, taking time to capture the key drivers that should govern how you think about everything you do. It is all too easy to dive into solving tactical and high-priority objectives, often at the expense of focus on the bigger picture and what success really looks like.

Take a moment to consider the following:

- **Your Corporate Strategy –** Overall mission and objectives for the enterprise at the highest level.

- **Your Ecosystem/Channel Strategy –** Current and future strategy in relation to how the company will leverage ecosystem/channel partners in support of strategic goals.

- **Your Top Initiatives –** The top company initiatives that will help support execution of the overall strategy.

- **Measurable Targets/KPIS –** What does success look like overall and in relation to each key initiative? How will success be measured?

Once key priorities have been clearly defined, you will be ready to focus on the ecosystem mapping process.

Map your Ecosystem!

The mapping process described here will take commitment from key stakeholders in your business, but it is THE critical element of ultimate success. Take a step back from day-to-day business activities and think carefully about your audiences, personas, influencers, and other participants. Only then can you begin to think about the tools, processes, and people you need to meet the content demands of your business.

Of course, traditional high-producing relationships will surface as critical members of your ecosystem. But if you can push yourself to think beyond those obvious relationships, you will find many more that can materially contribute to your bottom line and should be included in your ecosystem mapping.

Things to consider:

- **Think Holistically –** Consider your ecosystem and how it's interconnected in its entirety — even if you do not have plans to support the needs of all users on day one.

- **Audit As You Go –** Document the types of relationships you have, think about the role each of them plays or will play in your ecosystem and how this is changing over time.

- **Look Within –** Internal constituents can be critical catalysts for engagement velocity. Employees, partner agencies, other business partners – everybody who has something to say about the things you sell. They are all part of the engagement story.

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- **Understand Your Content (its value, or lack of!) –** Start breaking down where content can originate from based on relationship mappings. Engagement will dictate what everyone consumes, and everyone creates.

- **Identify the Influencers –** There are analysts and management consultants. Social and digital influencers. Individuals who are talking about and using your products and solutions.

- **Get Personal –** Based on roles and mappings, determine what these groups need and what you need from them.

- **Map the Mapping –** Are there geographical considerations to make? If so, how does that influence engagement principles?

Completing a formal auditing process that accurately captures this information will have a hugely positive downstream effect on every decision and investment you make moving forward. It is all too easy to rush to technology procurement and implementation without first having a clear understanding of your current business realities and roadmap for future success. If you can do the work up front to negate this risk, your execution path will be far clearer and more effective as a result.

The following table provides an actionable framework on how to structure a formalized ecosystem mapping process that considers all the different elements that must be considered when planning for ecosystem success.

Your Ecosystem Entities
Understanding and organizing the different entity types relevant to the organizations that comprise your ecosystem.

Entity Types/Sub-Types – What is the structure of different types of organizations that exist within the ecosystem? Is there any further segmentation (sub-types that may be relevant to each entity type)?

Volume – Approximately how many organizations exist today within each entity type classification?

Importance/Revenue – How important are the organizations within each entity type classification? If relevant how much revenue is associated with those organizations?

Key Needs — What is important to each entity type in terms of what you need to do to effectively support their organizational needs?

Future Strategy — What are the future goals and targets relevant to each entity type?

Management Structure — How are the organizations within each entity type supported today (both direct and through partners)?

Regional Focus — Are there any variations or important differences related to entities at a regional level?

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Your Partner Program
Understanding the existing partner program structure and how this relates to the different entity types you are working to support.

Program Segmentation – How are partners classified today in terms of program types and other variables such as tiers, product focus areas and journey stages?

Entity Focus – How do entity types fit into the different segmentation categories (for example are program tiers available to all partner types or restricted to a certain sub-set)?

Qualifying Criteria – How is it determined if partners qualify for the segmentation types in use (for example achieving program tiers or product certifications)?

Future Strategy – What are the future goals and targets relevant to the different segments of the program?

Regional Focus – Are there any variations or important differences related to program segments at a regional level?

Your Ecosystem Roles
Understanding and classifying the different user roles relevant to organizational entity types in your ecosystem.

Role Types – What is the structure of different types of roles that exist within each ecosystem entity type?

Volume – Approximately how many people exist today within each role type classification?

Entity Types – Are roles applicable to all entity sub-types or limited to a sub-set (for example a Developer Role may only be relevant to a Tech Partner)?

Key Needs – What is important to each role type in terms of what you need to do to effectively support their individual needs?

Program/Region – Are there any variations or important differences related to roles at a regional or partner program level?

Your Incentives Strategy
Understanding the role incentives play in driving ecosystem behavior and outcomes today whilst also considering future-state targets.

Incentive Types – What incentives are in use today at both a programmatic and activity-based level?

Current Status – How is the company executing on the current incentive type?

Investment/Importance – What is the level of investment in each incentive type?

End State Goal – What is the target goal in relation to each incentive type? Are new incentive types planned in the future?

Entity Focus – How do entity types fit into the different incentive types (which incentives are available to different entity types)?

Role Focus – Are incentive types offered only to certain roles within ecosystem organizations?

Program/Region – Are there any variations or important differences related to roles at a regional or partner program level?

Related Platforms/Vendors – Are any tech platforms being used to manage the different incentive types, if so, which?

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Your Engagement Team

Understanding and classifying the organizational resources who will drive engagement with your ecosystem members. Important here is to consider who can best support engagement with the different entity types that have been identified within your ecosystem.

Roles/Functions – What is the structure of the teams/roles that will support your ecosystem?

Entity Focus – Is there a particular entity type focus related to the team (for example by partner type or program)?

Responsibilities – What role will each team play in supporting the needs of different ecosystem members?

Program/Region – Are there any variations or important differences related to the engagement team at regional or partner program level?

Related Workflows – Are there any specific business workflows the engagement team will support? For example, if there are operational processes such as reviewing and accepting partner deal registrations who is responsible for supporting that?

Your Key Business Workflows

Understanding the key business workflows that are important within your ecosystem today and tomorrow.

Workflow Types – What are the key engagement workflows that are in place with your ecosystem members today? Are there additional ancillary workflows or ideas for new workflows that could help improve ecosystem productivity?

Current Status – How is the company executing on current workflows?

Entity Focus – How do entity types fit into the different workflows (which workflows are applicable to the different entity types)?

Role Focus – Are specific roles related to current workflows?

Program/Region – Are there any variations or important differences related to workflows at a regional or partner program level?

Related Systems/Integration Points – Are there any key systems/integration dependencies related to current or future-state target workflows?

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Your Enterprise Architecture
Understanding the systems and tools that are in place to support ecosystem members today, whilst also considering potential gaps in the current architecture.

Key Systems – What is in place today in terms of overall enterprise architecture, partner specific tools and other ecosystem engagement tools? Where are there potential gaps/requirements?

Ecosystem Use Cases – What role(s) do the systems identified play in supporting ecosystem engagement use cases?

Entity Focus – Are systems important in relation to certain entity types?

Role Focus – Are systems important to a sub-set of ecosystem roles?

Program/Region – Are there any variations or important differences related to systems at a regional or partner program level?

Client Lead/Owner – Who currently owns/supports each system from a business and technical perspective?

Access Model – If the system is accessible to ecosystem members how is access being controlled today? Is SSO in place?

Your Data Availability and Quality
Understanding current status and future plans in relation to data availability, quality and management.

Core Data Sources – Where is the critical master data that underpins ecosystem operations stored (employee/user data and external entities)?

Data Segmentation – How is master data currently segmented in terms of account type, roles and other core profiling information?

Data Hierarchy – How is relationship data structured in terms of grouping of organizations (parent/child relationship) and association of contacts to these entities?

Data Quality – What is the overall quality of data in terms of duplication, inactive records, archived information etc.?

Ancillary Data – What are the other data sources that may underpin ecosystem operations and where are these stored?

Data Ownership/Maintenance – How are key data sources maintained today? What is the data governance model?

Compliance and Data Privacy Considerations – How is data being protected today? What is the operational plan for ensuring data security, privacy, and legal compliance?

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Your Key Business Metrics
Understanding the key metrics is important to your organization and its ecosystem members.

Metrics Types – What are the key metrics used to understand performance at ecosystem, partner, and systems levels?

KPIs/Targets – What targets are used to track success against these metrics?

Current Status – How are metrics being tracked and reported today?

Entity Focus – Is the metric related to specific entity types?

Role Focus – Is the metric related to specific role types?

Program/Region – Are there any variations or important differences related to metrics at a regional or partner program level?

Your Operational Regions
Understanding the way your company segments the ecosystem based on regions.

Regions – What are the main regions the company operates within? How are these classified systematically?

Sub-Types – Are there sub-territories associated with each region? If so, how is this structured?

Entity Focus – Is the region applicable to all entity types or just a sub-set?

Program Focus – Is the region applicable to all partner program segments or just a sub-set?

Your Localization Objectives
Understanding how the company operates in terms of supporting user localization needs across active regions.

Languages – Based on the location of ecosystem members, what are the potential language needs the organization may have to support

Region – How do these languages map to the regional classifications the company uses?

Content Strategy and Goals – What is the target end state for supporting users associated with the language?

Workflow Localization – Would it be necessary to support localization of workflows in this language?

Current Status – How is the organization supporting the needs of users associated with this language today?

Impact/Priority – How important is effectively supporting users associated with this language to the company today? What are the potential implications of ineffective support in this language?

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The Importance of People

When considering how to apply technology to ecosystem success, one of the key elements often overlooked is the importance of human beings who ultimately drive every business outcome that matters.

The goal of your technology strategy should be to fully enable the individuals who are critical to your success.

For example, let's consider the challenge of effective ecosystem management. It is literally impossible for a small, centralized team to take responsibility for supporting the needs of every type of ecosystem member. Yet almost every portal strategy takes this approach, often leading to generic and irrelevant experiences that do little to enable or engage the high volume of end users they are meant to support.

Let's take a closer look at what this means in practice. In the 'Your Engagement Team' section of our ecosystem mapping exercise, we discussed digging deeper into understanding the people in your organization who can help drive ecosystem success – but why?

Think about all the potential personas within your organization who have a role within your ecosystem strategy. For example:

Executives and Leadership
Executives and leaders of the orchestrating business have a crucial role in setting the strategic vision for the ecosystem and ensuring its alignment with overall business goals. They provide direction, secure resources, and make key decisions to drive the success of the ecosystem.

Sales Professionals
Sales representatives, account managers, and sales executives who engage with customers and partners to drive revenue, negotiate contracts, and manage relationships.

Marketing Professionals
Marketing personas, such as marketing managers, product marketing specialists, and digital marketers, are responsible for developing and executing marketing strategies, campaigns, and initiatives to promote the ecosystem's offerings and attract customers.

Customer Success Managers
Customer success managers focus on building and maintaining long-term relationships with customers. They strive to maximize customer satisfaction, adoption, and retention by providing support, training, and proactive guidance.

Influencers
In addition to the personas directly involved in the ecosystem's operations, there are also non-transactional influencers who play a significant role in shaping its success. These individuals include consultants, analysts, investors, and even social or community influencers.

Partner Managers
Partner Managers are specifically dedicated to managing and nurturing relationships with partners within the ecosystem. Their role involves onboarding new partners, ensuring partner enablement, facilitating collaboration, resolving issues, and driving mutual success.

Product Managers
Product managers are responsible for overseeing the development, enhancement, and lifecycle management of the ecosystem's products or solutions. They work closely with partners and other stakeholders to align product strategies with market demands.

Technology Specialists
Technology Specialists and Operations possess expertise in the technical aspects of the ecosystem's products or solutions. They provide technical support, enable integration with partners' systems, and ensure smooth implementation and usage.
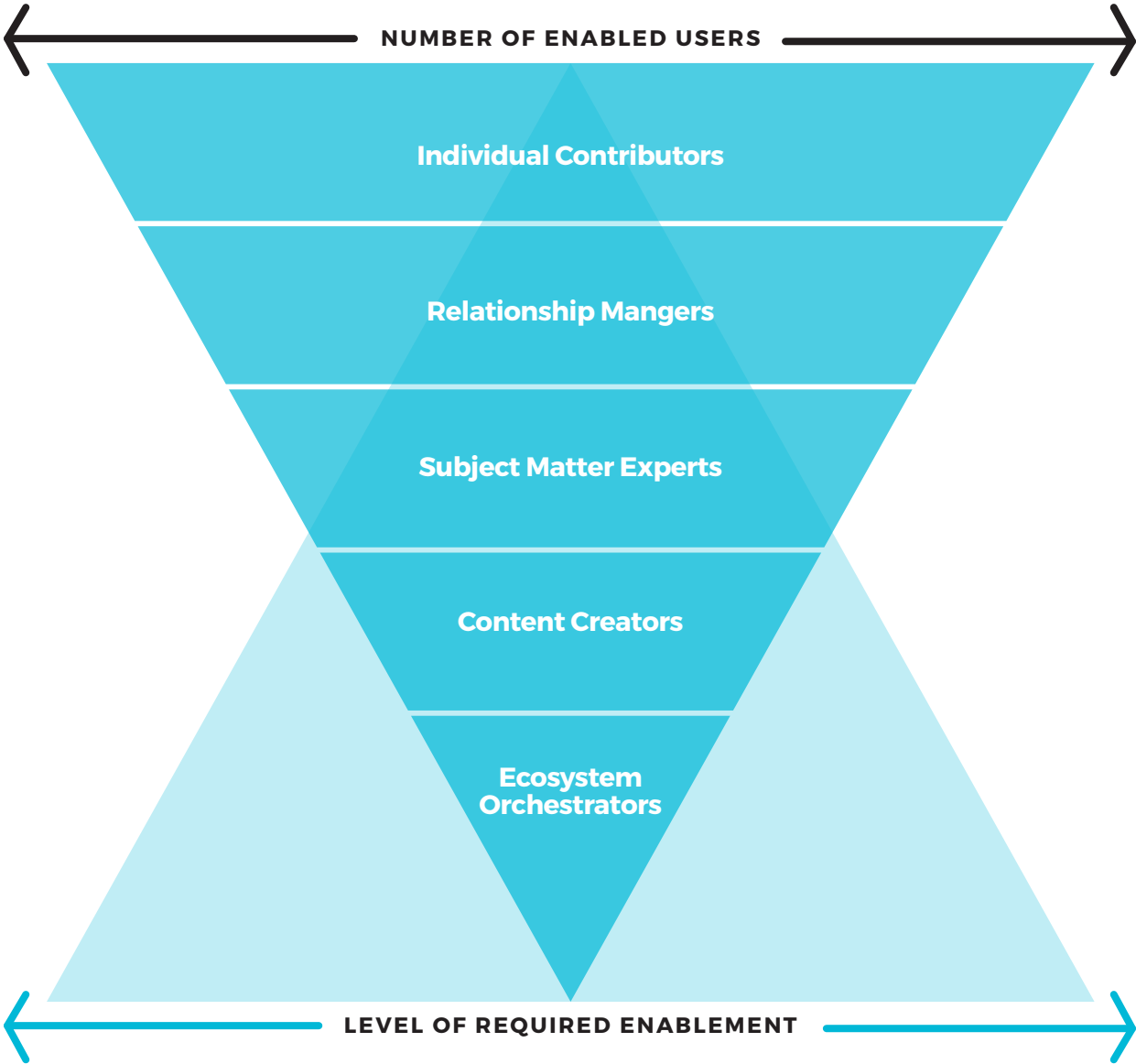
Operations and Supply Chain Professionals
Supply Chain Professionals the logistics, supply chain, and operational processes within the ecosystem. They ensure timely delivery, efficient inventory management, and optimized operations.

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How you fully embrace working with these cross-functional teams will be a key driver in creating a model for ecosystem success. Your goal should be to have a higher volume of people (e.g., ideally everybody!) contributing little and often vs. a very small number of people expected to support the overall needs of your ecosystem stakeholders.

This diagram illustrates how this can scale when you consider the level of enablement required for the masses vs. the in-depth knowledge required at system admin or portal manager levels.

NUMBER OF ENABLED USERS

Individual Contributors

Relationship Mangers

Subject Matter Experts

Content Creators

Ecosystem Orchestrators

LEVEL OF REQUIRED ENABLEMENT

By clearly identifying and classifying your organizational resources according to such a framework, you can change the way you empower and enable your stakeholders.

Even better, you can build structured onboarding, support, and performance review processes around this framework, ensuring the governance and oversight that will be necessary to effectively co-ordinate efforts across a significant volume of invested stakeholders.

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Technology Tooling

By implementing robust and adaptable tech solutions, businesses can create an ecosystem that precisely caters to the distinct needs and preferences of each persona, facilitating collaboration and ensuring a symphony of success.

Legacy tools:

In the past, Partner Relationship Management (PRM) systems were primarily standalone tools focused on end-to-end partner management. Afterall, less involved personas meant a less complex tech stack was needed to create a unified, streamlined user experience. However, as ecosystems have become more complex and interconnected, it has become evident that PRMs alone are no longer sufficient to meet the diverse needs of modern businesses. Limitations might include:

- **Lack of Functional Depth –** It is impractical to expect a single system to encompass all the necessary capabilities. For instance, a Training Module in a PRM system simply cannot rival the comprehensive functionality offered by a robust global Learning Management System (LMS). Recognizing this limitation, businesses must strategically evaluate their technology stack and leverage specialized solutions to address specific needs.

- **Complexity and Rigidity –** Legacy PRM software can be complex and rigid, with predefined workflows and limited customization options. This restricts the ability to adapt to unique requirements, processes, and workflows within an ecosystem, making it difficult to accommodate the specific needs of all stakeholders.

- **Inability to Keep up with Changing Business Needs –** Legacy PRMS, with their multitude of personas, tools, and systems, often fall short in providing the necessary flexibility to respond to changing requirements in real time. This lack of agility hampers organizations from effectively supporting dynamic needs as they arise.

In short – the days of a single application approach to managing ecosystem needs are over. Best-of-breed enterprise architecture is the only realistic approach that can work moving forward, but to truly support a scaled ecosystem the required tooling is significant.

Here are some of the key components of effective ecosystem orchestration:

Collaboration and Communication Tools
Platforms that allow real-time collaboration, communication, and knowledge sharing between different stakeholders within the ecosystem, fostering teamwork and alignment.

Training and Onboarding Support
Resources, courses, and tools to educate and train internal teams and partners, helping them understand products/services and onboard smoothly into the ecosystem.

Marketing Automation
Tools that automate marketing processes like email campaigns, lead nurturing, and content distribution, empowering partners to engage with prospects efficiently.

Account Mapping
An essential functionality that enables the mapping and visualization of partner accounts, ensuring a comprehensive understanding of the ecosystem's network and relationships.

Lead Generation and Management
Tools and features to generate and manage leads effectively, ensuring a steady stream of potential customers for partners in the ecosystem.

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Key components of effective ecosystem orchestration (cont.)

Deal Registration and Opportunity Management

Functionality to register and track deals, manage opportunities, and provide visibility into the sales pipeline for better coordination and conversion.

Renewals Management

Revenue impacting capabilities that enable the effective tracking and allocation of renewal opportunities to your ecosystem partners and internal stakeholders whilst also streamlining operational processes related to billing and revenue reporting.

Incentive and Rewards Management

A crucial functionality for managing and tracking incentives and rewards for partners, motivating them to drive desired behaviors and achieve targets.

MDF and/or Co-Op Fund Management

Streamlined management of Marketing Development Funds (MDF) and/or Cooperative Advertising (Co-Op) funds, enabling partners to efficiently access and utilize available funds for joint marketing activities, campaigns, and initiatives.

Marketplace Management

Tools and features to manage an online marketplace within the ecosystem. This includes functionalities such as product listing and categorization, order management, inventory tracking, payment processing, and customer support. Effective marketplace management ensures a seamless buying and selling experience for both partners and customers.

Partner Identification and Discovery

Tools to help you identify new partners and how best to focus efforts on existing partners based on profile data and predictive intelligence.

Business Planning

Resources and tools to assist partners in creating and executing their business plans within the ecosystem. This includes features like financial forecasting, goal setting, budgeting, resource allocation, and performance tracking. Business planning capabilities enable partners to align their strategies with the overall goals of the ecosystem and optimize their operations for success.

Partner Relationship Measurement

Functionality provides a structured framework for understanding the health of your partner relationships relative to other companies that they work with and to predict likely future performance based on KPIs that are important to your business.

Performance Tracking and Measurement

Metrics, dashboards, and reporting capabilities to track business performance, measure results, and identify areas for improvement.
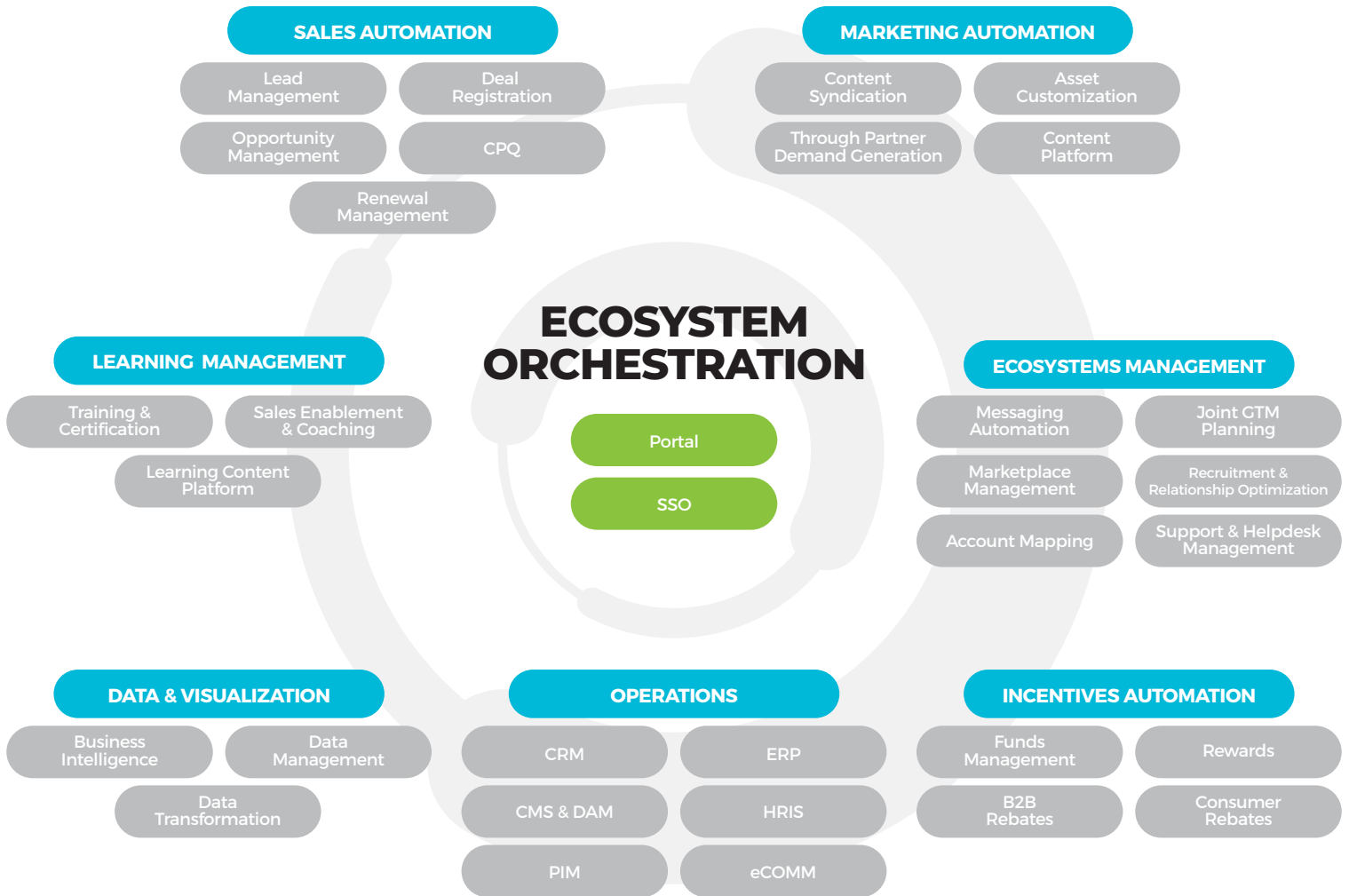
Data Analytics and Reporting

Capabilities to collect, analyze, and derive insights from data generated by various ecosystem activities, enabling informed decision-making and performance evaluation.

Integration Capabilities

The ability to integrate with other systems and applications to ensure smooth data flow, streamline processes, and enhance overall ecosystem efficiency.

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To give you a sense of the complete picture of potential tooling that must be effectively orchestrated across the entire ecosystem look at this capability map we developed at 360insights.

ECOSYSTEM ORCHESTRATION

SALES AUTOMATION
- Lead Management
- Deal Registration
- Opportunity Management
- CPQ
- Renewal Management

MARKETING AUTOMATION
- Content Syndication
- Asset Customization
- Through Partner Demand Generation
- Content Platform

LEARNING MANAGEMENT
- Training & Certification
- Sales Enablement & Coaching
- Learning Content Platform

ECOSYSTEMS MANAGEMENT
- Messaging Automation
- Joint GTM Planning
- Marketplace Management
- Recruitment & Relationship Optimization
- Account Mapping
- Support & Helpdesk Management

Portal

SSO

DATA & VISUALIZATION
- Business Intelligence
- Data Management
- Data Transformation

OPERATIONS
- CRM
- ERP
- CMS & DAM
- HRIS
- PIM
- eCOMM

INCENTIVES AUTOMATION
- Funds Management
- Rewards
- B2B Rebates
- Consumer Rebates

Many of the applications needed for success are not even Channel or PRM specific, but in fact the core enterprise architecture you are already using to support your business such as your Customer Relationship Management (CRM) provider or your Digital Assert Management platform (DAM). Additionally, other applications such as collaboration tools, sales enablement platforms or support systems will be key. Rather than focus narrowly on the concept of a single platform such as PRM, you must consider your entire architecture, past, present, and future!

Identifying and successfully leveraging the correct tools in the context of your ecosystem members' needs will be a critical component of your success. It's crucial to realize that achieving real results will require multiple pieces of technology to work effectively together.

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Why Incentives REALLY Matter

Motivating and incentivizing ecosystem behavior is an essential aspect of ecosystem orchestration. As different ecosystem players come together, it becomes crucial to encourage desired behaviors that contribute to the overall success of the ecosystem. By providing incentives and rewards that align with shared goals, organizations can foster engagement and active participation from ecosystem members.
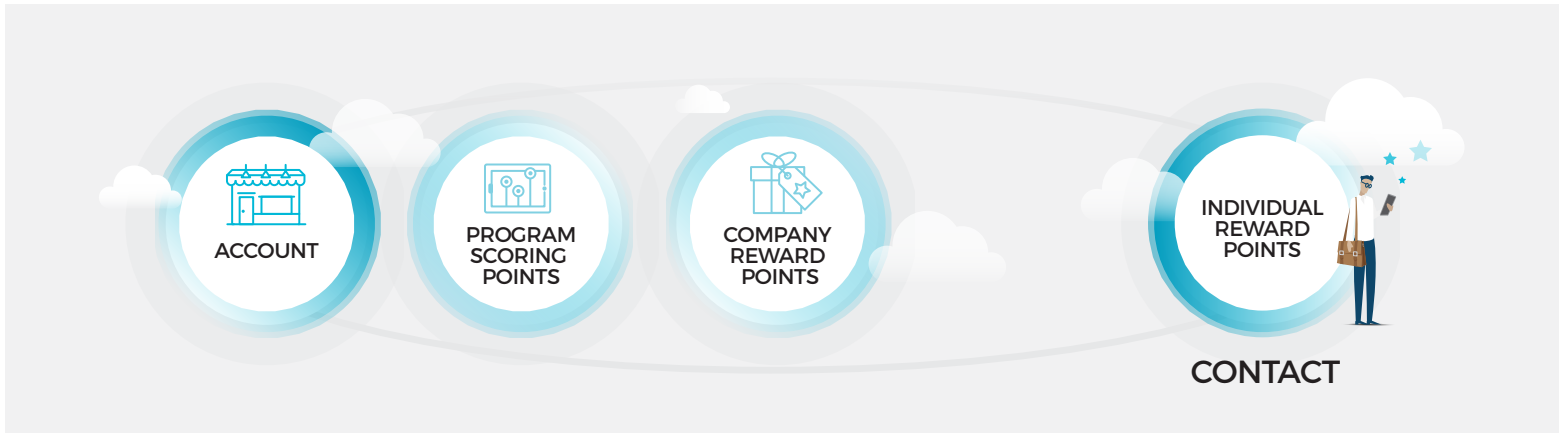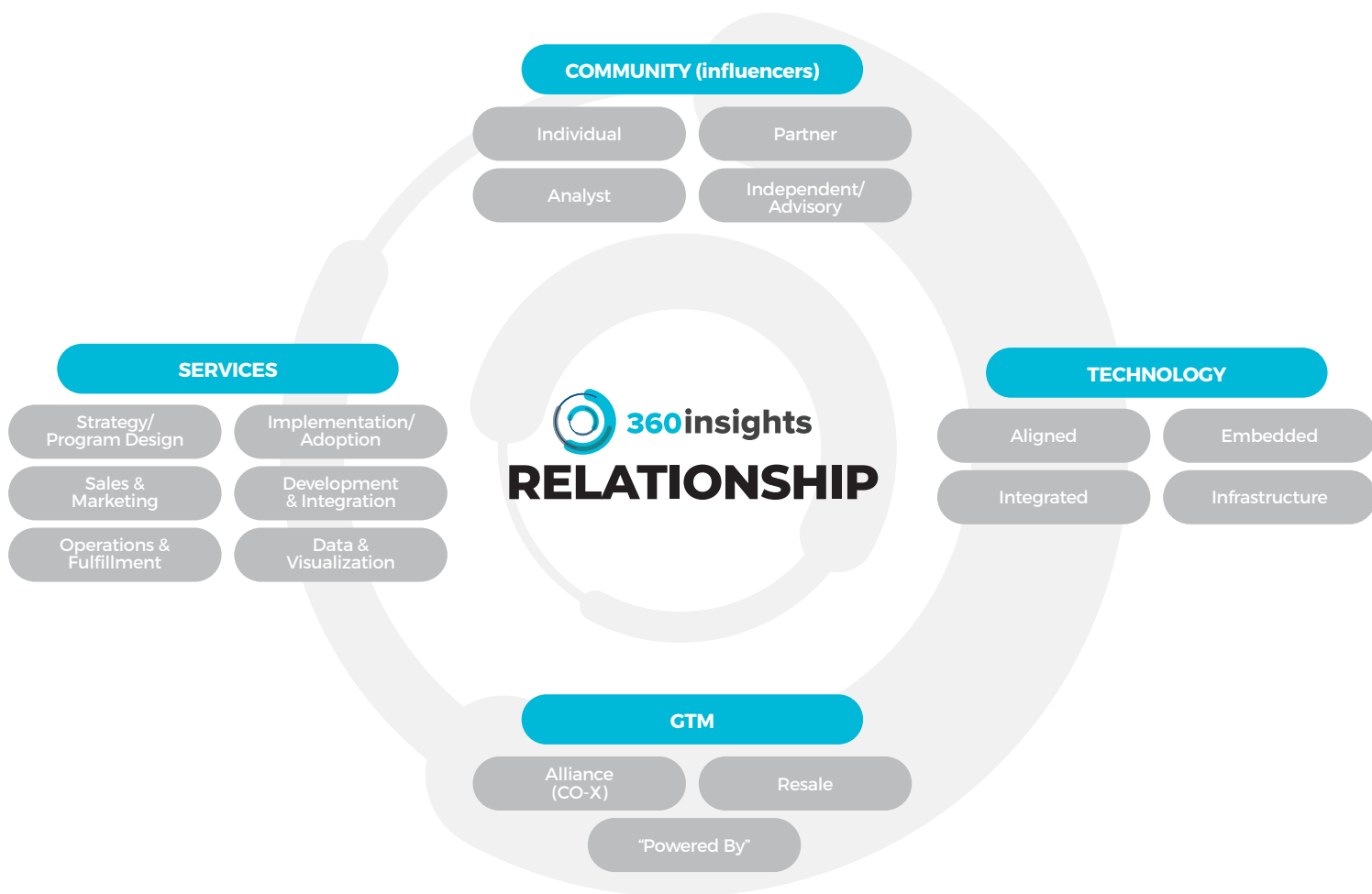

The truth is, without answering the 'what's in it for me?' question, you will fail to command the mindshare and level of engagement you expect.

It's also important to understand the different types of incentives that can play a role in driving the behavior you are looking to encourage, starting from your top-level approach, and drilling down from there:

Focus Area	Overview	Suggested Incentive Approach
Relationship Commitment	Incentives that foster a culture of repeated investment in a relationship over a sustained period.	Tier Points awarded over a rolling 12-month period
Relationship Motivators	Incentives that reward a partner for completing an objective that is important to your company.	Company Reward points that can be redeemed for business benefits.
Individual Commitment	Incentives that reward an individual (specific person) for completing an objective that is important to your company.	Individual Reward points that can be redeemed for personal benefits.

The framework above provides flexibility, allowing you to assign any combination of the mentioned elements to actions undertaken by your ecosystem members. For example, in the event of a partner successfully completing an onboarding process, you may wish to recognize their relationship commitment (Tier Points), the organizational investment (Company Reward Points) and the effort of the person who led the process (Individual Reward Points) altogether. In other scenarios where the achievement may have been much more focused on just a single person (such as an influencer social post), it may be appropriate to assign Individual Reward points only. And so on...

Once you've looked at how to structure things overall, start to consider the ecosystem motions that will really impact your business. For example, here's our own 360insights ecosystem framework.

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COMMUNITY (influencers)
- Individual
- Partner
- Analyst
- Independent/ Advisory

SERVICES
- Strategy/ Program Design
- Implementation/ Adoption
- Sales & Marketing
- Development & Integration
- Operations & Fulfillment
- Data & Visualization

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RELATIONSHIP

TECHNOLOGY
- Aligned
- Embedded
- Integrated
- Infrastructure

GTM
- Alliance (CO-X)
- Resale
- "Powered By"

Although our partner program is continually evolving, our ecosystem framework is built for long-term success and scale. By considering all the elements we need to support our business objectives (whilst also driving market influence through network effects), we have the map we need to navigate through an ambitious journey to ecosystem-led growth and scale.

Additionally, this provides us with a clear delineation of how to think about incentives and how they will expedite our strategy. Rather than try to apply a one-size-fits-all approach to evaluating and rewarding partner organizations and individuals, focus is on the specific motions that partners will undertake (of which there may be several).

For example, let's think about how to foster effective co-sales and marketing motions with partners (often the foundation of each partner relationship). By designing an incentive structure specifically focused on this motion, we can help partners better understand the give-to-get of developing business together. The following tables show an example of how this can be structured based on the framework approach described above:

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Example – Influencer Motion

COMMUNITY (influencers)

| Individual | Partner |
| Analyst | Independent/ Advisory |

INCENTIVES

By thinking about the one-time and iterative activities that will drive the incremental steps needed to build and nurture effective influencer relationships, we can start to systemically motivate key outcomes that will directly contribute to relationship success.

Activity	COMPANY		INDIVIDUAL
	Tier Points	Reward Points	Reward Points*
One Time (Onboarding)			
Activation of Portal User	-	5	5
Completion of Influencer Set-up Process	10	50	10
Creation of Solutions Marketplace Listing	5	20	10
Mapping of Account Overlap Data	5	20	-
Viewing All Key Influencer Content in Portal	-	-	10
Sales Outcomes (Iterative)			
Sales Accepted Introduction	-	20	10
Sales Accepted Opportunity	5	40	20
Closed Deal *(Referral Fee at 10% of Deal Value)*	10	100	50
Referral to Alliance Partner	-	20	10
Won Deal to Alliance Partner	-	40	20
Marketing Outcomes (Iterative)			
Linkedin Post Referencing Our Company	-	-	5
Blog Post Referencing Our Company *(10% Extra Credit per 50 Registrations)*	-	10	10
SQLs Generated via TPMA Demand Gen Campaigns *(per Lead)*	1	20	-

*Credited to the assigned activity owner on the partner team

Ecosystem Orchestration Success with 360insights

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Another key point to consider is that incentives are not static and can be created or adjusted at any time, in real time. If you have a quarterly target to hit or are trying to achieve better marketing outreach in a particular month, you can use incentives to motivate that behavior within that window. This practice is well understood when it comes to sales promotions but has rarely been effectively used for more granular, specific partner motions.

Rewards – Points Redemption

By also aligning the redemption of earned points to this model, partners can clearly understand the "give-to-get" of investing in a relationship with your company. Beyond just providing direct financial incentives, enabling partners to be seen and rewarded for the work they are doing on your behalf presents a significant opportunity to differentiate your company and build deeper loyalty with your ecosystem.

Activity	Company Reward Points
Sales Rewards	
Private Briefing to Sales Team	500
Private Briefing to Executive Team	1000
Private Briefing to Client Advisory Council	1500
2 Tickets to Attend Annual GTM Conference	2000
Marketing Rewards	
Blog Collaboration	250
Webinar Collaboration	500
Event Speaker Opportunity	1000
Hosted Pop-Up Networking Event	2000

For Individual Rewards you can provide cashback and merchandise via an online catalog of options, including the ability to donate to a chosen charity.

Rewards – Influencer Tiers

The key to sustained commitment is recognizing partner investments consistently over time. In this regard tier points based on specific motions can significantly drive long-term partner outcomes.

By linking tiers to benefits such as increased referral fees, or increased marketing investments, partners will have a clear path to success with rewards directly linked to the activities they need to undertake. For example:

Influencer Tier	Rolling Annual Tier Points	Benefits
Legend (Tier 1)	200	• +5% Referral Fee • 20% Company Rewards Discount • 10% MDF* on Sales
Superhero (Tier 2)	100	• +3% Referral Fee • 10% Company Rewards Discount • 5% MDF* on Sales
Rock Star	50	• +1.5% Referral Fee • 5% Company Rewards Discount • 2% MDF* on Sales

Marketing Development Funds – paid to partner to help fund execute joint marketing initiatives

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This same approach can be taken across all key ecosystem motions — all of which will have different incentive and reward drivers based on your chosen partner's activities and outcomes. The following table provides a high-level illustration of other key motions, based on our own 360insights ecosystem framework.

Partner Motion	Key Activities/ Incentives Drivers	Partner Priorities/Reward Drivers
SERVICES Strategy/Program Design	· E-Learning on Company Value Proposition · Consult Partner Onboarding Completion · CSAT on Project Delivery	**Company Rewards** · Access to Professional Services/Product Team Resources · In-person Training & Enablement Support · Marketplace Promotion Opportunities
Implementation/ Adoption	· Platform Use Case Training · Implementation Process Onboarding · Technical Training & Certification · CSAT on Project Delivery	
Sales & Marketing	· E-Learning on Company Value Proposition · Brand Training · Business Development Services Onboarding · CSAT on Project Delivery	**Tier Benefits** · Higher Priority on Assigned Opportunities · Increased Margin on Services Fulfilled · PS Hour Rebates Based on Services Fulfilled · Discount on Company Rewards
Development & Integration	· Technical Training & Certification · API Usage Training & Certification · CSAT on Project Delivery	
TECHNOLOGY Marketplace Referral (Embedded)	· Technology Partner Onboarding/ Initial Validation · Completion of Security & Compliance Reviews · Development of Marketplace Solutions Content · Marketplace Leads Generated	**Company Rewards** · Access to Product Team Resources · In-person Training & Enablement Support · Marketplace Promotion Opportunities
Resale (Integrated)	· Technology Partner Onboarding/ Initial Validation · Development Partner Enablement · Joint Solutions Development · Revenue Generated on Joint Solution	**Tier Benefits** · Higher Priority on Roadmap Investments · Increased Margin on Solution Sales · Discount on Company Rewards

Whilst your variables and business priorities may differ, focusing your strategy on specific value drivers and rewards that acknowledge targeted behaviors - based on clearly defined motions will benefit both you and your partners more than a generic, one-size-fits-all approach.

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It's not just about points....

Equally important to driving ecosystem and channel outcomes is the management of transactional incentives, including managing funds and payments to partners and individuals in a secure, scalable, and globally compliant infrastructure.

MDF & Co-op	B2B Incentives	SPIFF & Loyalty	Cashback, Rebates
FUND MANAGEMENT	REBATE MANAGEMENT	REWARD MANAGEMENT	CONSUMER INCENTIVES

360insights offers a comprehensive solution for managing all incentive types on a single platform, where all elements operate together seamlessly. This eliminates the fragmentation typically associated with using multiple tools and user interfaces to manage different incentive programs, enhancing user adoption and positively influencing business outcomes.

And it's not just about partners...

When you start to think more holistically about your ecosystem, it becomes evident that the same approach can be applied to other types of stakeholders, such as your internal teams. By using the same methodology for key employee motions, you can create highly structured, scalable incentives that will get your entire team aligned with core priorities every day.

And how about your customers? How can you monitor and reward their participation in programs like NPS/detailed feedback surveys or when they refer new business to other companies that may be interested in your solutions?

In an era where we are all being asked to do more with less, precisely targeted incentives that scale based on clear outcomes can significantly boost your ecosystem's success. However, to fully capitalize on these opportunities, a different mindset and advanced technical tooling is required.

Which leads us on to the most important question...

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How do we make this all work?

While Partner Relationship Management (PRM) systems provide an all-in-one solution for traditional Channel Management, their adaptation to the needs of end-to-end ecosystem management across all key personas is not realistic.

Forward thinking organizations are recognizing the increasing importance of providing a unified and seamless experience to each specific ecosystem member whilst maximizing the value of their existing and future technology investments. Industry experts strongly advocate for a modern, cloud-native technology stack to keep pace with these changing dynamics.

Achieving this requires a new approach. It must include the variety of techniques, tools and technologies required while creating a centralized, integrated experience for the end users.

Enter 360insights. Leveraging over two decades of insights from multiple entrepreneurial companies, we have created a **Composable Ecosystem Management Platform** that is designed for future success. Moreover, we have developed methodologies and best practices, all supported by dedicated expert services and a carefully curated marketplace of complementary technologies and services.

Where to start?

If you've completed a robust ecosystem mapping exercise you may feel daunted by this question.

Start with a definition of what success looks like from a technical execution perspective. These are the guiding principles we apply at 360insights:

- ✔ **A personalized, high performance portal experience for all ecosystem members**
- ✔ **Ecosystem success through the automated incentivization of ecosystem user behavior**
- ✔ **Ecosystem productivity through the integration of all key business apps and content**
- ✔ **Ongoing optimization of results through analysis of engagement and integrated app data**
- ✔ **Regular reporting on progress against agreed KPIs**

Attempting to address every business priority, ecosystem persona and use case may be overly ambitious as a phase one objective. It is normally best to concentrate your early efforts on your most pressing business priorities, and then iterate from that foundational success.

For example, if your top priority is to launch a more effective partner portal that also supports the needs of your partner management team, it might be best to build your initial implementation plan around this core objective only. Similarly, if your business's primary goal is enabling the development of a marketplace where multiple partners collaborate, that might be your starting point.
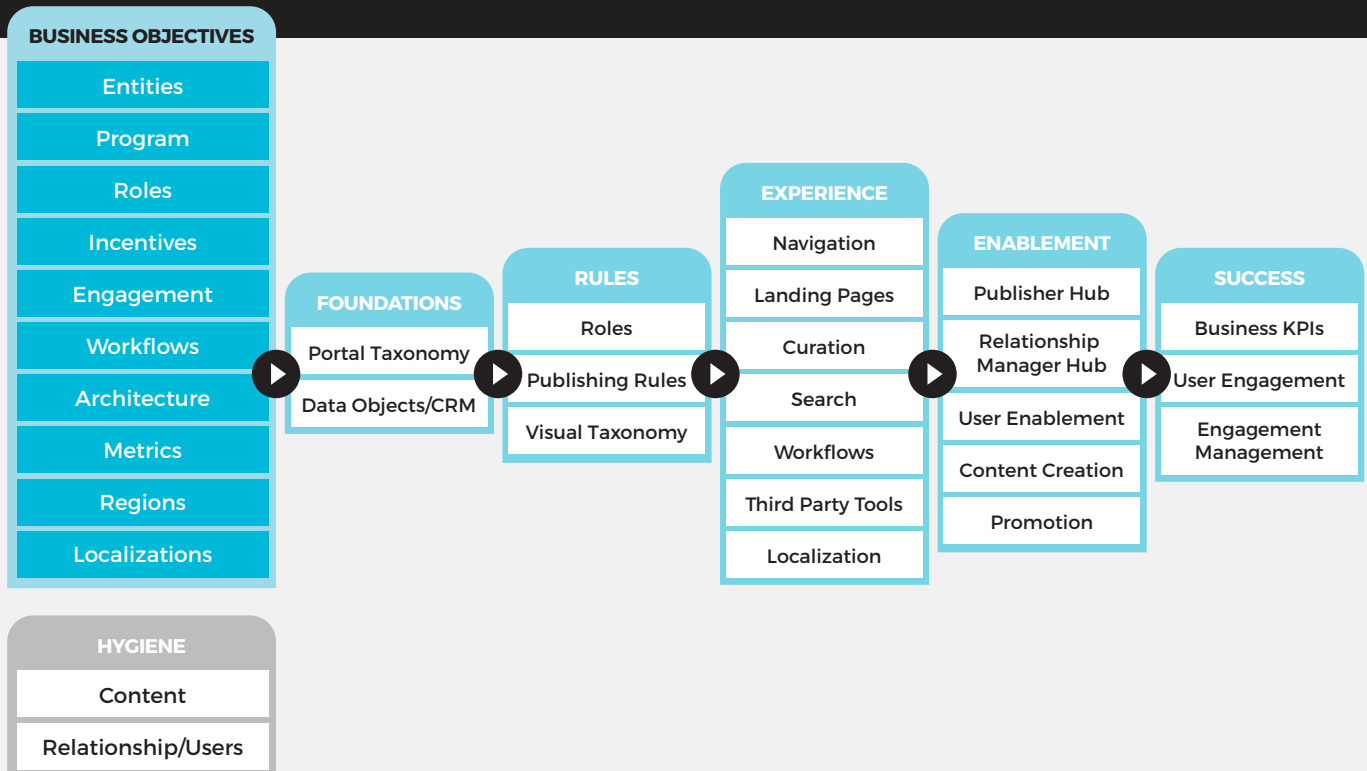
The great thing about ecosystem orchestration is its flexibility – you don't have to tackle every challenge simultaneously. Instead, you can address each priority sequentially, applying the same methodologies for success to each prioritized iteration.

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A Best Practice Approach

To achieve the overarching goals indicative of ecosystem success, 360insights has developed a proven, repeatable methodology that translates business objectives into tangible technical outcomes.

The diagram below illustrates how everything comes together in the context of 360insights' Ecosystem Portal technology.

Ecosystem Orchestration Map

BUSINESS OBJECTIVES
- Entities
- Program
- Roles
- Incentives
- Engagement
- Workflows
- Architecture
- Metrics
- Regions
- Localizations

FOUNDATIONS
- Portal Taxonomy
- Data Objects/CRM

RULES
- Roles
- Publishing Rules
- Visual Taxonomy

EXPERIENCE
- Navigation
- Landing Pages
- Curation
- Search
- Workflows
- Third Party Tools
- Localization

ENABLEMENT
- Publisher Hub
- Relationship Manager Hub
- User Enablement
- Content Creation
- Promotion

SUCCESS
- Business KPIs
- User Engagement
- Engagement Management

HYGIENE
- Content
- Relationship/Users

360insights' Ecosystem Portal solution provides extensive flexibility in all aspects of configuration – from end user experience down to system level integration. Whilst this presents a substantial opportunity, it also poses a challenge due to the myriad of technology configuration options.

This highlights the importance of the ecosystem mapping exercise described earlier. By focusing on desired business outcomes and beginning with a clear understanding of all ecosystem variables, we can determine the optimal way to implement, configure and optimize the technology.

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Foundations
The baseline configuration that underpins all ecosystem operations and experience – a critical baseline of operational efficiency and scale.

Portal Taxonomy – The information architecture in relation to classifications across all dimensions of the ecosystem. This starts with overarching classifications, like core entity and content types, and extends to granular tag structures such as solutions, industries, or regional variations like territories and languages. Equally important is the segmentation criteria including Partner Types, Program Status and Tiers. Accurately defining these elements based on your unique ecosystem structure is for scaling operations and processes without friction.

Data Objects/CRM – T the definition of transactional objects that will be key to the operational processes and data related to your ecosystem members. This includes understanding the key integration points (data objects and fields) that will influence elements like ecosystem experience using audience management and personalization features.

Change Management – Like with all aspects of system configuration, it is important to consider foundational changes that may impact overall ecosystem engagement over time. For example, if there is a major shift in partner program strategy or segmentation, data mapping must be adjusted accordingly. Similarly with content, if go-to-market product and solution classifications are modified significantly, foundational configuration should be realigned.

Rules
The key ingredient of effective governance is in establishing rules that define very specific permissions, shaping all aspects of the end user experience.

Roles – From core entity types to the detailed personas of each user type in your ecosystem, roles control the understanding of the different personas and their permissions across all your ecosystem stakeholders.

Publishing Rules – Working in synergy with your overall portal taxonomy, publishing rules enable you to create highly sophisticated governance around ecosystem engagement. They empower your internal teams to manage various aspects of the portal experience without technical support (no-code, really!). For example, if you wish to onboard an SME whose only role is to write technical blogs for approved marketplace partners in a specific region, publishing rules facilitate the delegation of this responsibility, ensuring centralized control and oversight remains intact.

Visual Taxonomy – High-impact branding and intuitive navigational imagery are essential to a modern digital experience. By configuring the rules associated with branding variables, you can automate the personalization of each user's visual experience based on their specific persona and role. For example, if you have a significant alliance with a key business partner, you can auto-configure the visual taxonomy to tailor their portal experience with their company's imagery and branding – creating a highly impactful, personalized feel without manual effort.

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Navigation – The portal's layout is tailored to the individual needs of the user. This includes key elements like the main portal sections (top navigation) and other navigational elements that present content and data pertinent to that specific user.

Landing Pages – Optimal portal experiences make it easier for users to find everything they need in the most expedient way. Landing pages play a key role in this regard, especially when enhanced with persona and role-based personalization. For example, to cater to your influencer community, a dedicated landing page (Influencer Hub) that provides access to the tools, content, and incentives that an influencer needs, all within a single click, will greatly boost engagement compared to a generic website or a one-size-fits-all partner portal. Furthermore, landing pages help structure portal sections by topic, such as a Learning Hub that centralizes training and enablement resources relevant to the user.

Curation – Taking the view that a select few can simplify the lives of the many, curation is a critical element of ecosystem engagement success. Empowering your experience managers to build compelling content that packages resources contextually based on topic, activity, or announcement, can pro-actively drive targeted engagement that aligns with the daily needs of your ecosystem members. Consider a partner sales rep looking to successfully close a customer deal with your technology. By providing details about the opportunity (customer size, vertical, solution needs etc.) you can be automatically presented with curated content such as marketing assets, sales templates, case studies and technical resources relevant to the deal's stage and profile. Moreover, these curated assets can cater to other needs, such as when users is search for resources outside of a specific sales activity.

Search – Users expect to easily find what they are looking for through keyword search and filters, a behavior everyone has been taught in their consumer lives, yet often lacking in a B2B context. By organizing and contextualizing resources for your users, it is key to provide a search experience that is both efficient and relevant (less really is more). Configuring search outcomes based on user profile, persona and needs is critical to providing an effective and impactful experience to all users.

Workflows – Well-structured workflows are essential for guiding users through more user journeys like onboarding and enablement motions, whilst also being the key element for orchestrating transactional processes, including deal and opportunity management.

Third Party Tools – As highlighted in the Technology Tooling section of this document, the cornerstone of effective orchestration lies in the ability to leverage various tools within a unified, composable experience personalized to the user's profile and requirements. When designing such experiences, it's vital to seamlessly integrate third-party apps, services and content sources into the portal's digital fabric. Whilst 360insights works with an array of technology partners to provide an "out-of-the-box" installation approach, optimizing configurations to align with the distinct objectives of ecosystem users remains essential.

Localization – Based on the localization goals identified in the ecosystem mapping process, it's crucial to dedicate attention to effective portal localization. This means not just presenting content in alternate languages where appropriate but also aiding publishers and experience managers in creating 'first language' content for users in specific regions. Enabling the creation of native content often enhances the user experience compared to simply translating every element, whilst also reducing operational overhead on the core team.

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> ***Enablement***
> *Effective ecosystem orchestration is a team game with many, many players! Effective enablement and support of your entire community, based on their role and responsibilities, will be a vital pillar of your success.*

Publisher Hub – Once the creation rules and role assignments have been established, it is key to provide your publishers and experience managers with the tools they need to succeed.. Providing a dedicated workspace (Publisher Hub) that helps them effectively create and modify content they are responsible for, coupled with real-time reports enabling them to measure the effectiveness of their efforts, will directly impact the success of your primary business objectives.

Relationship Manager Hub – Enabling relationship managers to support the organizations they are responsible for is another key element of effective ecosystem orchestration. This includes enabling users to manage relationships in terms of collaboration, process and workflow execution. It also means empowering users to create and share content relevant to their specific relationships. For example, a Customer Success Manager (CSM) might share a curated business update, highlighting the latest performance dashboards as a content element within a tailored customer portal experience.

User Enablement – With an effectively-planned ecosystem engagement strategy, there will likely be numerous stakeholders to consider for structured user enablement. This can span from detailed onboarding and certification of key system administrations and experience managers to lightweight training for individual content contributors, or tricks and tips for general portal users. To this end, building a scalable and trackable enablement plan, executed via the Ecosystem Portal, is crucial both during the initial implementation phase and continuously as governance requirements evolve and new users join.

Content Creation – Once users are effectively enabled, the emphasis should shift to creating the 'net new' content within the Ecosystem Portal experience. Traditional marketing assets and other corporate content repositories are just one element of the essential content needed to satisfy your ecosystem user demand. Empowering subject matter experts to create compelling digital experiences, including timely announcements and curated content, is a key component of the overarching enablement strategy.

Promotion – Effective ecosystem orchestration often relies on a 'coalition of the willing' – both internal and external stakeholders eager to embrace technology to impact their own outcomes. It is crucial to build a plan to oversee communication and change management around your ecosystem strategy and the advantages of the technologies involved for your user community. Your early champions will promote the value of your offerings, resulting in greater adoption among peers eager to experience similar benefits.

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The End Results?

As you will have gathered from this document, ecosystem orchestration involves hard work and inherent complexity. However, the outcome is true simplicity and scalability in your end user experiences – all of them!

> # Any Fool Can Make Something Complicated. It Takes a Genius to Make it Simple.

Woody Guthrie

Consider a scenario where an ecosystem member engages with your business with a very specific profile. Imagine a Marketing Manager at a technology partner tasked with updating key business plan inputs, helping drive leads to your joint solution offering, and managing the content of their solutions listing on your partner marketplace.

Presenting this user with a one-size-fits-all portal designed for a Sales Representative at a reseller won't align with their role and duties and is simply not going to work. They may log in once out of curiosity, when really needing specific content, or to accept a marketing lead. However, they will not be regular visitors who view your portal as a valuable tool to engage with your company. This misalignment is a primary reason why adoption of partner portals tends to be poor outside of the 'must do's' like deal registration or claiming MDF dollars.

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360insights' technology, combined with an effective and well-thought ecosystem orchestration strategy, completely transforms this situation. We contextually arrange the experience and tools that each individual requires in a composable interface that makes it incredibly easy to do business with you.

COMPOSABLE ECOSYSTEM SUCCESS PLATFORM

POWERED BY:

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So, back to our Technology Partner. The graphic above illustrates how the supply and demand you've mapped into our Ecosystem Portal solution will automatically surface content and tools the Marketing Manager requires in a single interface they'll love to use. And crucially this also allows you to measure all the engagement data in one centralized location.

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Measuring Success

Whilst technology effectiveness is often evaluated on its features and functionality, it's imperative to shift focus towards the true metrics that represent success for your business.

As highlighted earlier, 360insights' Ecosystem Portal technology enables you to measure and visualize every aspect of engagement across your ecosystem, encompassing people, processes, and platforms. Yet, collecting data is just the beginning of a data-driven approach. What's essential is to interpret this data in a way that facilitates continuous optimization of your strategy and investments to enhance ecosystem outcomes.

As with the configuration process, 360insights has also developed a best practice methodology for measuring success – predominantly focused on the following elements.

> **Business KPIs**
> *Tracking the key metrics that define your success*

Top-Line KPIs – Tracking the most important indicators established in your ecosystem mapping analysis example e.g., pipeline generation, partner-sourced revenue, CSAT, PSAT, etc.

Entity/Segment-Based KPI's – Analysis and optimization based on the detailed metrics that you have defined for specific segments within your ecosystem. For example, measuring success of your influencer community's engagement through deal attribution, level of content engagement and growth in social media interactions. Breaking down your business goals into such distinct elements (aligned with your ecosystem mapping segmentation) enables you to focus in on key initiatives, whilst also measuring the performance of team members responsible for supporting various ecosystem participants.

> **User Engagement**
> *Effective user engagement is the key to driving ecosystem success. 360insights analyzes ecosystem engagement performance from several perspectives.*

Adoption – Analysis on the trend of active vs inactive users, general user adoption trends, including total and average levels of user interaction over set periods.

Content Engagement – Multi-faceted analysis of user content consumption considering what is accessed most, the effectiveness of different content types, how users find content (or not), and what can be optimized based on usage trends.

Transactional Engagement – Transactional engagement goes beyond just analyzing the effectiveness of revenue-impacting processes like lead generation and closed opportunities. It also includes transactional user journeys such as user onboarding, guided enablement journeys, and structured campaign execution. By applying a consistent framework approach that standardizes all transactional engagements into a single user experience, you can measure and refine your key business processes using data and insights from real time user activity.

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> **Engagement Management**
> *Effective engagement management is a critical ingredient in driving impactful business adoption. Focusing not just on user adoption, but also on the effectiveness of the strategies employed to drive the desired adoption is paramount.*

User Experiences/Journeys – Whilst there is a WWW obsession with customer user journeys and experience quality, portal user experience often gets neglected. Leveraging data and user feedback to assess the effectiveness of your user experience for different persona journeys is vital. If you can build the right approach tailored to specific personas, it can be scaled to accommodate 100's or even 1000's of users with similar needs.

Personalization – For ecosystems, one size truly does not fit all. Personalization at organization, role and individual profile level (including user-driven personalization and behavior) is essential for success. Analyzing metrics concerning the effect of personalization on adoption, content and transactional engagement will enable you to understand how effectively you're serving different types of users, and how best to optimize if results show room for improvement.

Publishing – As highlighted in The Importance of People section, enabling a large community to manage experiences will create a sustainable and scalable strategy, efficiently supporting the needs of your ecosystem members. Analyzing the data associated with publishing activity and effectiveness will help you ensure your governance strategy is working, and that you are attaining the desired participation levels across different internal teams and other content creators.

Relationship Manager Engagement – Tracking the effectiveness of your assigned relationship managers in supporting the entities they oversee (whether clients, partners, influencers, analysts, etc.) will help you understand if you are achieving the level of internal engagement required to support your external ecosystem members. As with more established processes like sales team performance, comparative review across teams with similar roles is particularly important. Demonstrating that top-performing team members consistently drive business outcomes can be a strong incentive to motivate others to achieve similar results.

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What does this look like in practice?

360insights provides a comprehensive set of integrated dashboards, presenting all key data directly to your users, including third-party data from your existing applications. Additionally, we work with our clients to conduct periodic 'Health Checks', offering a deeper insight into user engagement and engagement management trends along with actionable recommendations.
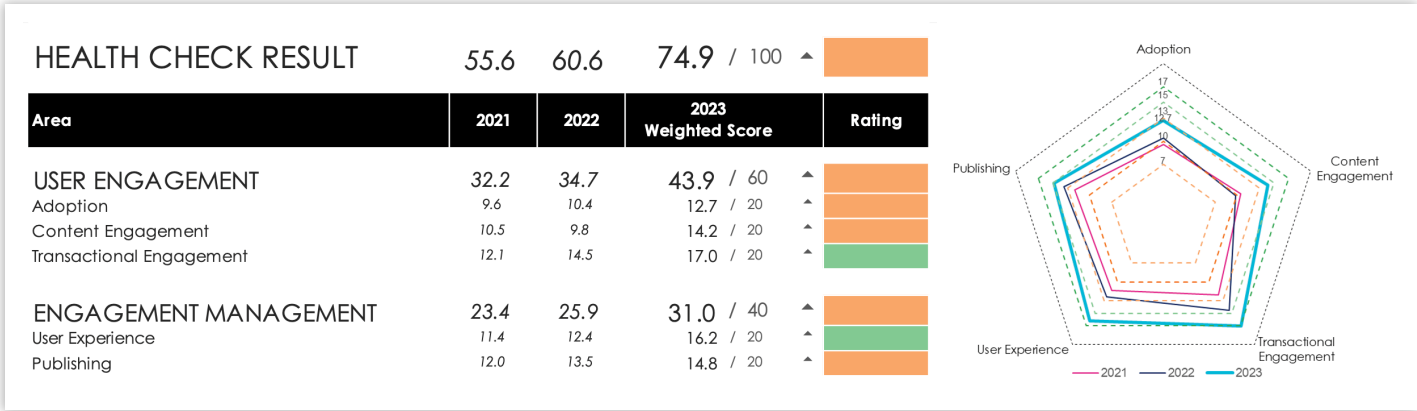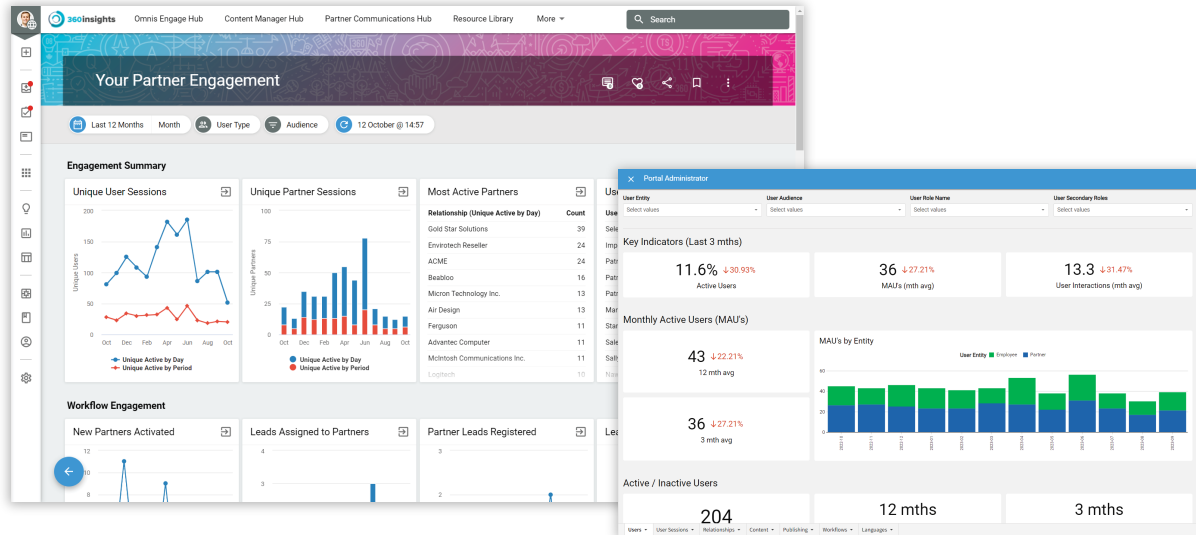
In summary – data doesn't lie, and results are everything. Portals are frequently judged on subjective criteria like perceived quality of design, even when they are ineffective for their intended users.

To truly understand how to build and maintain a highly effective ecosystem orchestration strategy, continuous focus on key metrics (from overarching KPIs to detailed engagement trends) is as important to your business as customer journey analysis is to leading e-commerce companies.

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Final Thoughts

The journey to effective ecosystem orchestration is the single biggest opportunity in the next evolution of go-to-market (GTM) strategy for businesses, regardless of size or structure. However, to effectively realize this, organizations must embrace a new perspective on the methodologies and tooling essential for success.

Traditional solutions like Partner Relationship Management systems (PRM) and company intranets are not built for this mission. Trying to create bespoke solutions using Digital Experience Platforms (DXP's), such as Salesforce Experience Cloud, will be too slow to market and extremely difficult to build and maintain.

360insights offers the only solution in the market capable of truly orchestrating end-to-end ecosystem management at any level of scale, all without the heavy lifting normally associated with complex enterprise transformation initiatives. We are eager to collaborate with the most ambitious, forward-thinking enterprises who are serious about ecosystem success. If you resonate with this vision, we invite you to connect with us.

ABOUT 360insights

360insights is revolutionizing the PRM landscape by challenging traditional approaches and positioning itself as a leader in ecosystem orchestration. But don't just take our word for it. Here's what the Forrester 2023 PRM Wave Report had to say: "360insights is challenging traditional approaches to PRM...positioning itself for a future in which ecosystem management and orchestration are integral for B2B organizations that rely on collective partner productivity and performance," the report reads.

"It's ecosystem platform strategy focuses on easy integration with other software to support the partner journey, data management, and customer experiences. Combined with its leading incentives management capabilities, 360insights' PRM activates ecosystem engagement."

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360insights Composable Ecosystem Platform

360insights is on a multi-year journey to supercharge enterprise ecosystems, providing a no-code platform that enables clients to manage and incentivize ecosystem interactions at any level of scale.

Combining unique personalization technology with the industry's leading incentives platform, 360insights provides a single-pane-of-glass portal experience that unifies enterprise apps, content, and ecosystems interaction into a single, consumer grade experience that users love to use.

Experience Automation

Completely unique personalized portal experiences for any type of organization and user type ... automatically.
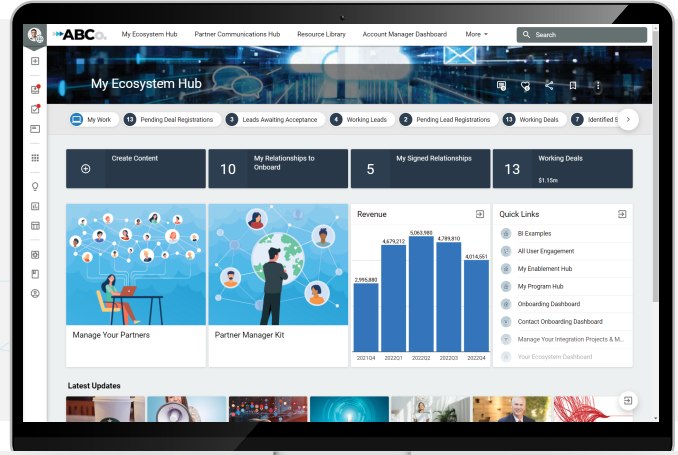

Incentives Automation

A unified solution covering a complete range of incentive types including points and rewards, MDF/COOP, B2B/consumer rebates and end-to-end claims management.
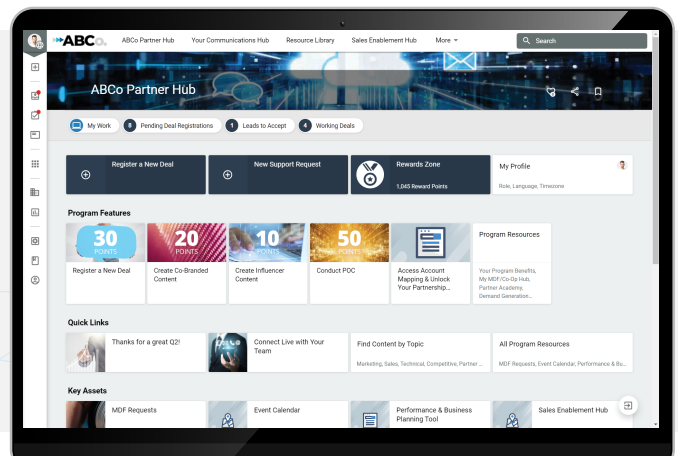

Engagement Management

Highly flexible configuration enabling non-technical users to create and manage engagement experiences and incentives programs across all ecosystem segments.

Ecosystem Orchestration Success with 360insights
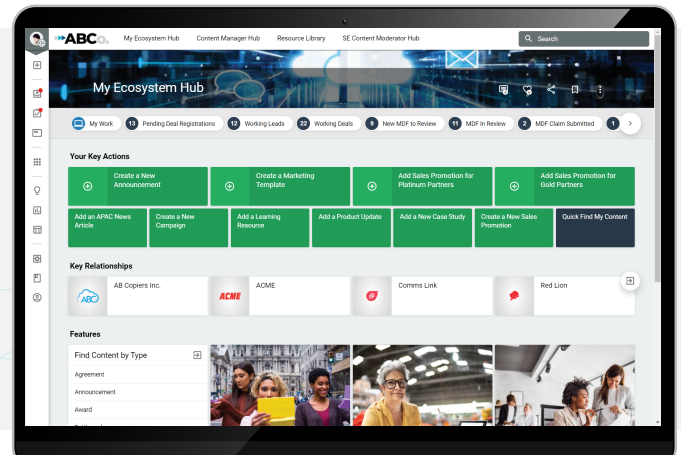
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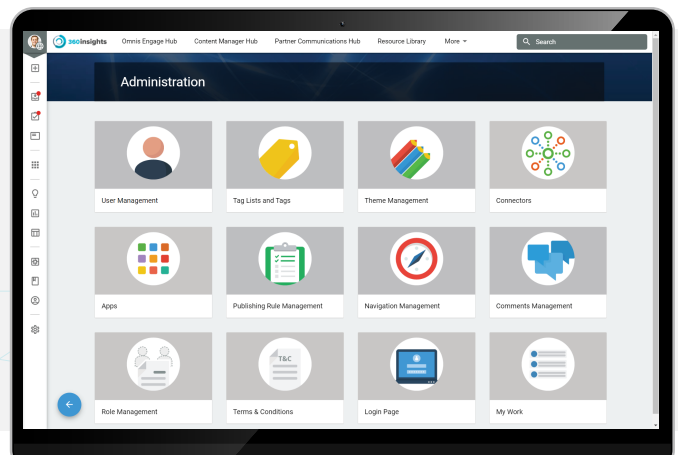
Data and Intelligence

Deep on-demand visibility into ecosystem performance against key business drivers including the ability to easily manipulate and visualize data for consumption and program optimization.
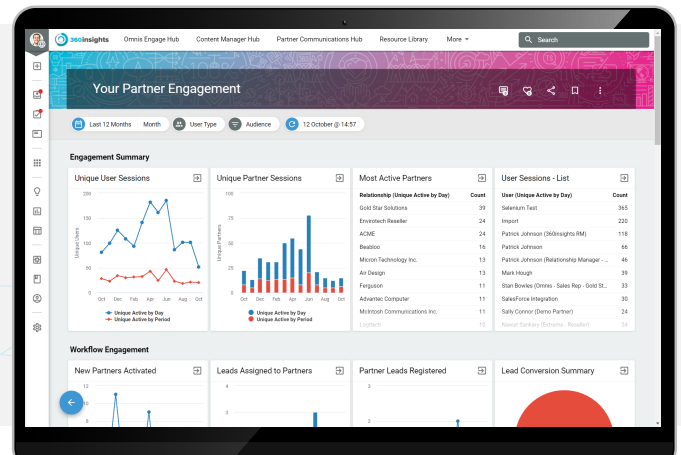
Connector Framework

Integrating key content and applications to create a unified, frictionless experience for users.

360insights Marketplace

A carefully curated collection of complementary solutions offered by strategic partners, dedicated to developing services and technology that directly influence ecosystem outcomes.

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