ACUMATICA SUMMIT WORKSHOP

VAR + Agency = $

ACRO COMMERCE

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Table Of Contents

Choosing the Right Agency Partner

Key Criteria to Build Successful Partnerships and Drive Client Success

A Guide for VARs

Partnering with the right agency is critical to delivering seamless ecommerce solutions, especially when ERP systems are involved. Use this checklist to evaluate potential agencies and ensure a partnership is built for success.

Alignment with Your Ideal Client Profile (ICP)

- [ ] **Industry Experience** - Does the agency clearly demonstrate proven expertise in your ICP's sector (e.g., manufacturing, B2B)?
- [ ] **Target Market Knowledge** - Are they familiar with the challenges and goals of mid-market companies, especially those undergoing digital transformation?
- [ ] **Relevant Case Studies** - Does the agency have a portfolio of customers with supporting case studies that meet your ICP?
- [ ] **Pricing Structure and Transparency** - Is their pricing model clear, transparent, and aligned with your budget and expectations?

Shared Vision and Values

- [ ] **Strategic Alignment** - Do their goals align with your overall long-term strategy, including the direction of your services and solutions?
- [ ] **Commitment to Collaboration** - Is their team open to aligning and refining sales, marketing, and production strategies to collaborate more effectively?
- [ ] **Ethics and Professionalism** - Are their values consistent with your organization's approach to business, staff and customers?

Importance of Proper Planning

- [ ] **Discovery and Planning First** - Does the agency prioritize comprehensive customer planning phases to establish clear roadmaps for execution?

- [ ] **ERP Implementation Coordination** - Have they managed ecommerce projects alongside ERP implementations?
- [ ] **Risk Mitigation** - Do they have a system for early identification of challenges and a clear process for addressing them?

Agency Processes and Approach

- [ ] **Demonstrated Processes** - Does the agency provide clear documentation and case studies showcasing their approach to incorporating partner project development?
- [ ] **Transparent Communication** - Can they demonstrate a structured communication process, with examples of how they keep stakeholders informed throughout a project lifecycle?
- [ ] **Defined Roles and Accountability** - Do they outline specific roles and responsibilities for the VAR, agency, and client teams to ensure clarity and accountability?
- [ ] **Lead Handling Efficiency** - Are there well-documented processes for lead generation, management, and follow-up to ensure seamless collaboration?

Skills and Capabilities of the Agency

- [ ] **Ecommerce and ERP Expertise** - Do they have technical skills in platforms like BigCommerce and Shopify with integrations to ERP systems (e.g., Acumatica)?
- [ ] **Decoupled Architecture Knowledge** - Are they well-versed in headless (or decoupled) architecture that empowers businesses to choose best-in-breed platforms for their needs?
- [ ] **Integration and Customization Expertise** - Can they demonstrate proficiency in building integrations with other systems and a successful history of custom development to meet unique client needs?
- [ ] **Post-Launch Support and Maintenance** - Does the agency offer ongoing support, maintenance, and optimization services to ensure continued success after the project is launched?

Proven Partnership Readiness

- [ ] **Partner Enablement** - Can they demonstrate that they have documentation and processes in place to onboard and support partners effectively?
- [ ] **Responsiveness** - Are they quick and effective in addressing questions, challenges, and opportunities?
- [ ] **Scalability and Growth** - Can the agency match your pace, handle similar deal sizes, and support your future growth projections?

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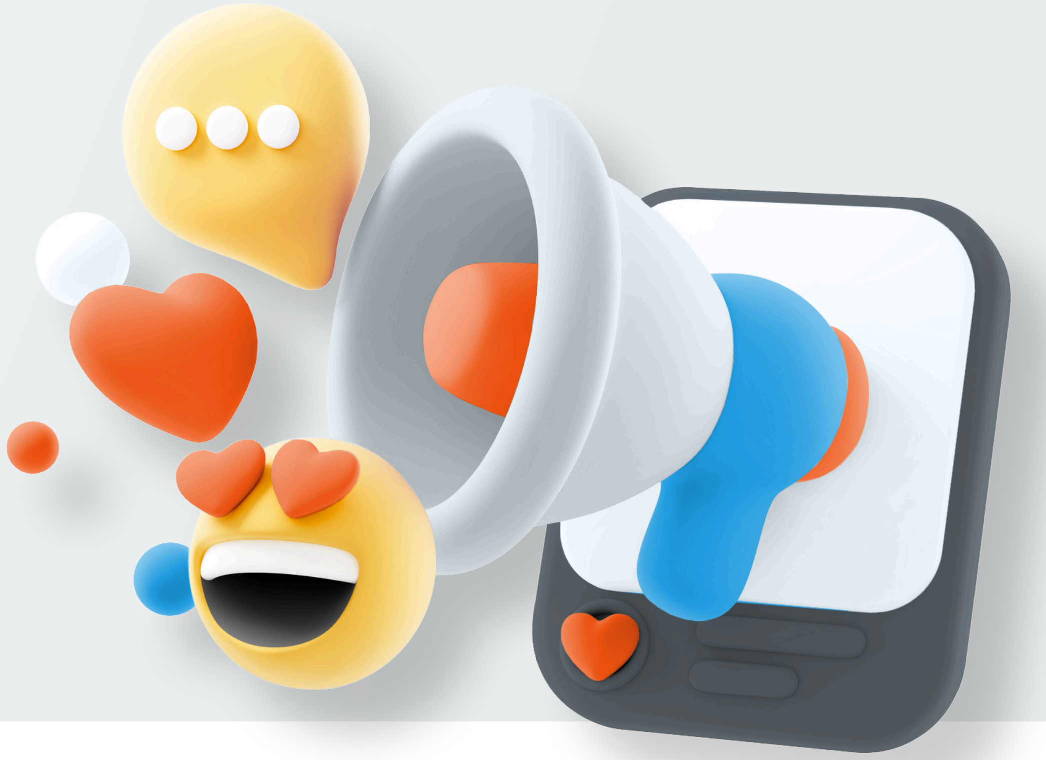
Marketing Collaboration

Introduction

The VAR/Agency Marketing Workshop is designed to get a good understanding of each organization's current marketing activities. From there the goal is to explore opportunities where opportunities exist to co-market through a variety of channels. Ideally, the workshop ends with clear next steps on a few marketing opportunities that enable the VAR and agency to combine efforts to promote the value of the partnership as well as a mutual understanding of how the teams will work together on new initiatives.



Marketing Checklist

- ☐ **Present Marketing Strategies** - Each party shares an overview of their current marketing strategies, including target audiences, channels used, and key messaging.
- ☐ **Identify Opportunities to Market Together** - Based on the presented strategies, brainstorm and identify areas where collaborative marketing efforts overlap and would be beneficial for both parties to join forces on.
- ☐ **Align Value Propositions** - Work together to clearly articulate the combined value of the agency and the VAR for prospects and clients. Develop messaging that highlights the complementary strengths of both organizations and resonates with the target audience.
- ☐ **Formulate Processes & Stakeholders for Initiatives** - Define the process for planning and executing joint marketing initiatives, including identifying key stakeholders and their roles and responsibilities.
- ☐ **Budget & Resource Allocation** - Collaboratively determine the financial and resource contributions from each party towards co-marketing initiatives. This involves outlining each party's allocated budget for joint activities and identifying the resources (e.g., personnel, technology, tools) that each party can dedicate to the collaborative effort.
- ☐ **Creation & Execution** - Develop and implement the agreed-upon co-marketing initiatives, which may include:
  - Blog posts, articles, infographics & whitepapers
  - ABM campaigns for a shared prospect list
  - Joint speaking engagements at industry events or conferences
  - Joint exhibition at trade shows, maximizing visibility and cost-efficiency
  - Co-hosted lunches or cocktail hours at networking events
  - Industry-specific podcasts or educational webinars
  - Your own event or workshop
- ☐ **Lead Management** - Establish a process for sharing and managing leads generated from co-marketing efforts, ensuring a clear understanding of each party's involvement in prospect nurturing, data capture, conversion, and reporting.
- ☐ **Reporting & Communication** - Set up regular communication and reporting mechanisms to track progress, measure results, and optimize co-marketing activities.

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Sales Collaboration

Introduction

The VAR/Agency Sales Workshop is designed to establish collaboration between the VAR and agency sales teams. By aligning sales strategies, sharing processes, and identifying opportunities, the workshop establishes a unified approach to co-selling. The ultimate goal is to create a seamless sales journey that drives success for Acumatica leads, joint prospects, and existing customers requiring ecommerce solutions. This session sets the foundation for effective teamwork, ensuring both parties can confidently navigate shared opportunities.

Sales Checklist

- ☐ **Define Sales Opportunity Scenarios** - Collaborate to identify key sales scenarios, such as Acumatica-provided leads, new prospects, and existing customers requiring ecommerce enhancements. Discuss potential referral opportunities and establish clear criteria for each scenario to ensure consistent qualification and prioritization.
- ☐ **Present Sales Processes** - Both teams will share their existing sales workflows, from initial lead engagement to deal closure. This step helps uncover synergies, align methodologies, and ensure a comprehensive understanding of each team's approach.
- ☐ **Map the Collaborative Sales Journey** - Create a shared sales journey that integrates lead generation, qualification, pitching, and closing. Establish clear roles and responsibilities for both teams at every stage to ensure a smooth handoff and unified client experience.
- ☐ **Identify Gaps Between Sales Teams** - Analyze the differences in sales strategies, tools, and processes between the teams. Pinpoint areas where misalignment could hinder efficiency or client satisfaction and document these gaps for resolution.
- ☐ **Resolve Identified Gaps** - Work together to address any barriers to collaboration. This could involve providing sales assets, conducting cross-team training, or establishing communication protocols. The goal is to eliminate friction and build a cohesive team dynamic.
- ☐ **Establish Lead Ownership & Follow-Up Strategies** - Determine how leads will be shared, assigned, and followed up on. Develop clear accountability for each lead, ensuring timely action and a unified approach to client engagement.
- ☐ **Create a Feedback Loop** - Set up mechanisms for ongoing feedback between the teams. This might include regular check-ins, shared performance metrics, and a process for addressing challenges or refining strategies over time.
- ☐ **Role-Playing and Scenario Practice** - Engage in role-playing exercises to simulate joint sales scenarios. This hands-on activity allows both teams to practice collaboration, refine messaging, and identify areas for improvement in real-time.
- ☐ **Document the Co-Selling Strategy** - Summarize the outcomes of the workshop into a detailed co-selling strategy document. This should include processes, responsibilities, shared assets, and timelines to ensure everyone is aligned moving forward.

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Project Onboarding

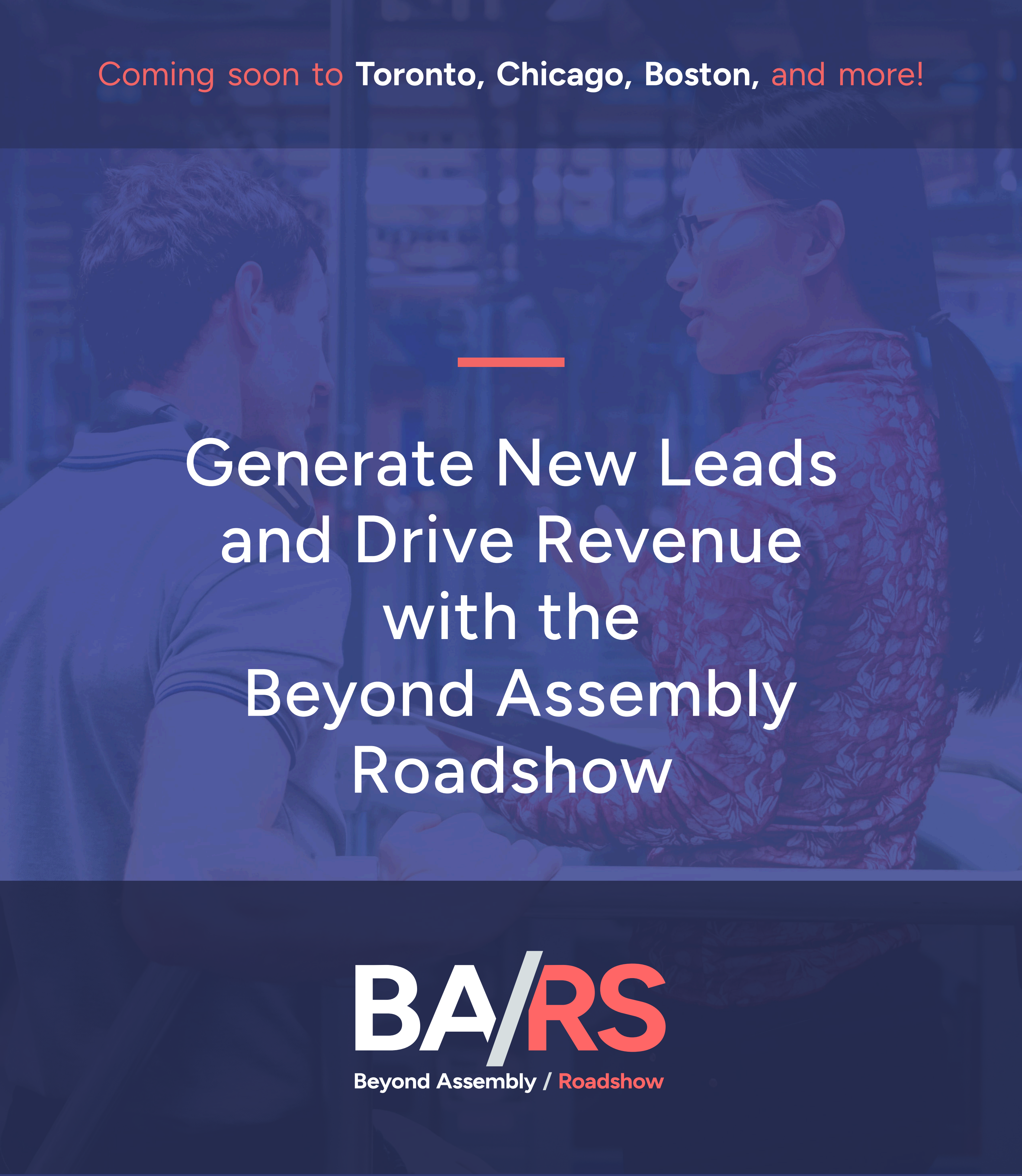
Introduction

The VAR/Agency Onboarding Workshop is designed to establish clear communication and cadence between the VAR and agency implementation teams. By aligning stakeholders, sharing processes, and identifying opportunities, the workshop establishes a unified approach to co-implementation. The ultimate goal is to create a seamless customer journey that drives success for new and existing customers requiring ecommerce solutions. This session sets the foundation for effective teamwork, ensuring both parties can confidently navigate shared projects.

Project Onboarding Checklist

- ☐ **Define Situation & Complexities** - There are typically two scenarios in which an agency and VAR would integrate workflows to meet customer requirements: adding commerce to an existing VAR client or working together with a new lead to implement ERP and commerce solutions in parallel.
- ☐ **Compare & Contrast Planning Components** - The planning phase can look vastly different given the complexity of the project for both VARs and Agencies; therefore, it's critical to identify key components of each party's process. By leaning on the expertise in ERP systems and operations, an agency is able to gain a deeper understanding of the implications of their integrations. Much the same in the other respect, the integrations and implications of ecommerce may change the approach or, at minimum, the order of operations a VAR may take when implementing an ERP solution in tandem.
- ☐ **Define Stakeholders** - Introducing a third party to any relationship creates an environment where communication can be challenging. By defining stakeholders early, their roles and responsibilities, and areas of expertise will help create a clear picture for the client when parties from both the Agency and VAR are being introduced.
- ☐ **Identify Cadences** - While each Agency and VAR will have their own cadences and meetings, it's important to collaborate where applicable to reduce time requirements on the client and avoid unnecessary doubling of information. Ensuring each team has unlimited visibility into each other's cadences with the client will help both teams create a unified feeling.

- ☐ **Resolve Identified Gaps** - Work together to address any barriers to collaboration. This could involve providing access to technologies such as project management software, conducting cross-team training, or establishing further communication protocols. The goal is to eliminate friction and build a cohesive team dynamic.
- ☐ **Create a Feedback Loop** - Set up mechanisms for ongoing feedback between the teams. This might include regular check-ins, shared performance metrics, and a process for addressing challenges or refining strategies over time.
- ☐ **Be Willing to Adapt** - No two projects will look exactly the same or have stakeholders who respond identically to the last. Both VAR and Agency have to be willing to adapt their processes, stakeholders and cadences to find a happy medium that gives the client a unified, cohesive implementation experience.
- ☐ **Document the Process** - Summarize the outcomes of the workshop into a detailed implementation document. This should include processes, responsibilities, stakeholders, shared assets, and timelines to ensure everyone is aligned moving forward.



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