

Designing a MSP Program from Scratch

AN OUTLINE ON HOW TO CREATE A
UNIQUE AND VALUABLE PROGRAM FOR
YOUR PARTNERS

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Executive Summary

[DESIGNING AN MSP PROGRAM FROM SCRATCH](#)

This eBook is your comprehensive guide to designing a best-in-class Managed Service Provider (MSP) partner program from the ground up. In eight in-depth articles, we explore the key strategies that take MSP programs beyond the ordinary and transform them into powerful engines for mutual growth and success.

[**1. BEYOND DOLLARS: UNLEASHING BEHAVIORAL DISCOUNTS FOR MSPS**](#)

Traditional discount structures often miss the mark. We delve into how behavioral discounts can incentivize MSPs to drive better results, fostering stronger engagement and commitment by aligning financial rewards with desired behaviors.

[**2. BEYOND BASICS: THE JOURNEY TO EXCELLENCE THROUGH ADVANCED TRAINING INITIATIVES**](#)

Advanced training is a critical differentiator for MSPs in today's fast-evolving tech landscape. This article outlines how to design training programs that go beyond certifications, equipping MSPs with the expertise to deliver exceptional service and stay ahead of the curve.

[**3. BEYOND BOUNDARIES: CRAFTING TRIUMPHS WITH REVOLUTIONARY CO-MARKETING**](#)

Co-marketing is often an underutilized asset in MSP relationships. We explore how innovative co-marketing strategies can unlock new revenue streams and strengthen partnerships, creating shared victories for vendors and MSPs alike.

4. BEYOND BUG FIXES: REDEFINING CLIENT EXPERIENCE WITH CUTTING EDGE TECHNICAL SUPPORT

Great technical support is more than troubleshooting—it's about transforming the client experience. This article discusses how to structure support services that not only resolve issues but build long-term trust and loyalty between MSPs and their clients.

5. BEYOND TRANSACTIONS: BUILDING & MAINTAINING A THRIVING COMMUNITY FOR TECHIES AND SALES PROS

Community-building is a powerful tool for MSP programs. By fostering a collaborative environment for both technical and sales professionals, vendors can create a vibrant ecosystem that drives continuous innovation, knowledge-sharing, and lasting relationships.

6. BEYOND THE PORTAL: HEAVEN OR HELL?

Partner portals are essential for managing MSP relationships, but they can either empower partners or frustrate them. We investigate what makes a partner portal heavenly—a seamless, user-friendly, and empowering tool—and the pitfalls that turn them into hellish bottlenecks.

7. BEYOND FEEDBACK: THE CUSTOMER ADVISORY BOARD

The Customer Advisory Board (CAB) ensures MSP program success by offering strategic input from key partners. It provides valuable insights on program development, product direction, and emerging challenges. This ongoing feedback helps the program stay relevant, strengthens partner relationships, and fosters advocacy for wider adoption

8. BEYOND ASSEMBLY: PUTTING IT ALL TOGETHER

Building an MSP program requires a cross-functional effort, with various departments contributing to its success. Sales, marketing, training, and technical support must collaborate closely to align their goals. Executive sponsorship is critical to ensure resources are allocated, and the program is prioritized at every level. By fostering cross-departmental collaboration, the MSP program can be effectively developed, implemented, and maintained, driving long-term growth for both the vendor and its partners.

CONCLUSION

This booklet is a blueprint for reimagining MSP partner programs, from financial incentives and advanced training to technical support and co-marketing initiatives. Whether you're just starting to build your MSP program or looking to revitalize an existing one, these strategies will help you create a program that delivers value, strengthens partnerships, and drives growth for the long term.

Before We Start: Why isn't a Reseller Partner Program Good Enough for Partnering with a MSP?



While reseller partner programs are valuable for many types of partnerships, they may not be the ideal choice for collaborating with Managed Service Providers (MSPs). These are, in no specific order, the Top 6 Reasons why a dedicated MSP partner program is essential.

Different Business Models

MSPs operate under a distinct business model compared to traditional resellers. They provide ongoing services, often involving complex support and management. A reseller program focusses on simple product resell and does not address the specific needs and nuances of the MSP's business, leaving them without the necessary support and resources.

Incentive Structure

The vendor aims to boost product sales, hence integrates product based incentives, such as rebates and special discounts, into their reselling program. However, such programs will only effectively promote products that the vendor is particularly eager to introduce to the market, such as newly released items or technologies targeted for clearance. Managed Service Providers (MSPs), on the other hand, focus on designing and overseeing intricate solutions, and do not rely on product-specific incentives. Attempting to motivate partners and enhance product sales solely through product-specific incentives is likely to be unsuccessful.

Specialized Training

MSPs require specialized training to effectively manage and support the technology solutions they offer. A reseller partner program will always focus on product knowledge and selling skills rather than on any deep level technical training and expertise that MSPs need to serve their clients adequately.

Strategic Collaboration

Partnering with an MSP will involve a strategic, long-term commitment. A MSP partner program fosters deeper relationships, offering joint marketing, co-selling initiatives, and performance tracking and reviews, which are critical for the success in this partnership. Usually reseller program are very light on these aspects and do not provide the same level of strategic collaboration.

Market Understanding

MSPs have in-depth knowledge of their target markets and the specific challenges their customers face. A dedicated MSP partner program allows IT vendors to align with and even leverage this expertise and tailor their offerings accordingly. A reseller program often lacks these feedback loops and misses to leverage valuable partner insights.

Support for Service Delivery

MSPs require ongoing support, including service delivery and problem resolution. A reseller program might primarily focus on product sales and lack the support mechanisms needed for service-oriented partnerships.

CONCLUSION

In conclusion, the unique characteristics and needs of MSPs make a dedicated MSP partner program a more suitable choice for successful collaboration. While reseller partner programs have their place, they often fall short in addressing the specific demands of a partnership with Managed Service Providers. A tailored program for MSPs ensures alignment, specialized training, strategic collaboration, market understanding, and robust support mechanisms, leading to more fruitful and enduring partnerships.

The Ultimate Guide to Ruining your Vendor-MSP Partnerships: A Hilariously Terrible Partner Program



In the fast-paced world of business, it's crucial to stay ahead of the game. But what if you want to take a more unconventional approach?

Well, we've got just the thing for you: a foolproof guide on how to ruin a vendor-MSP partnership by creating a Partner Program so mind-bogglingly terrible that your MSP partners will be running for the hills.

Buckle up, because we're about to unleash the chaos!



Exclusive Access to Outdated Training Videos: The '90s Called, They Want Their Tutorials Back

Nothing says "partnership" like forcing your resell partners to endure hours of cringe-worthy, outdated training videos. From the pixelated graphics to the cheesy elevator music, these gems will transport your partners straight back to the golden era of VHS tapes. Want to learn about the latest product updates? Good luck deciphering it through the low-res haze of nostalgia!



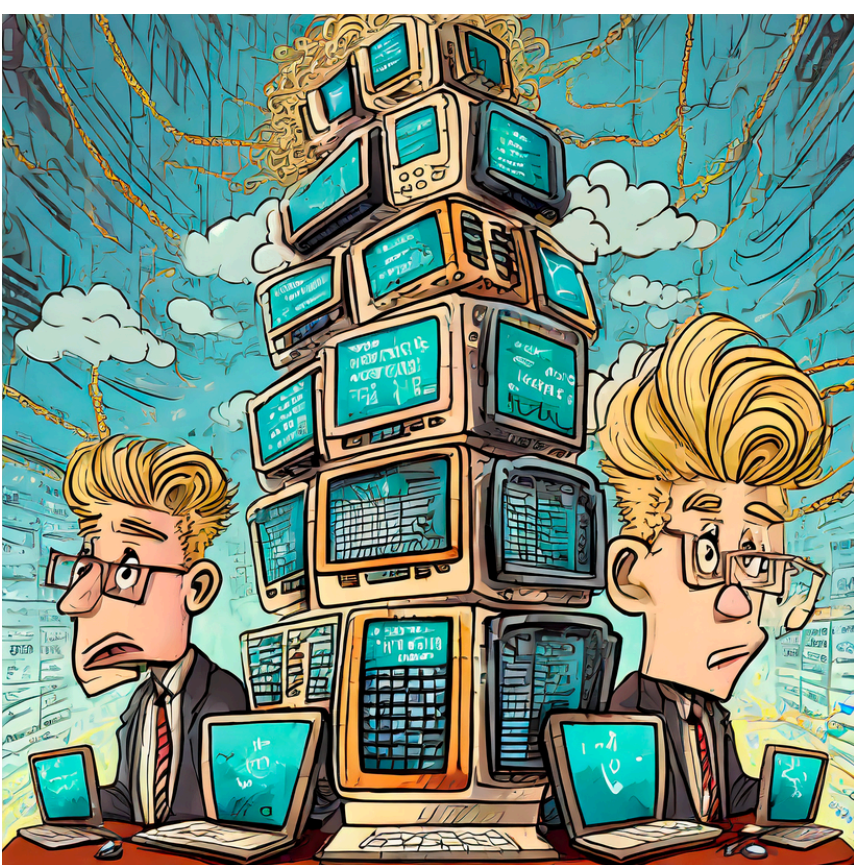
Mandatory Participation in the Annual Office Chair Racing Championship

Forget team-building activities or industry conferences – make way for the Annual Office Chair Racing Championship! Partners will be thrilled to trade in their business suits for racing gear as they navigate obstacle courses in their trusty office chairs. Who needs valuable business insights when you can have an adrenaline rush dodging the water cooler obstacle?



Cryptic Commission Calculations: Because Who Doesn't Love a Good Mystery?

Cryptic Commission Calculations: Because Who Doesn't Love a Good Mystery? Why make commission calculations straightforward when you can turn them into an elaborate riddle? Introduce a complex formula that involves the number of cups of coffee consumed, the phase of the moon, and the total number of office plants. Watch as your partners desperately try to crack the code, all while questioning their life choices.



Random Product Renaming: Because Consistency is Overrated

Keep your resell partners on their toes by randomly renaming products every month. One day they're selling the "Super Mega Turbo 5000," and the next, it's the "Ultra Extreme Velocity X." It's a great way to test their adaptability and see if they can keep up with the ever-evolving world of nonsensical product names.



Customer Support Hotline Featuring On-Hold Karaoke Competitions

Who needs prompt customer support when you can have a karaoke competition instead? Force your resell partners to serenade their way through Mozart's greatest hits while on hold, desperately awaiting assistance. Bonus points if the hold time is longer than the average rendition of "Bohemian Rhapsody." Because nothing says "customer satisfaction" like a partner with a sore throat.

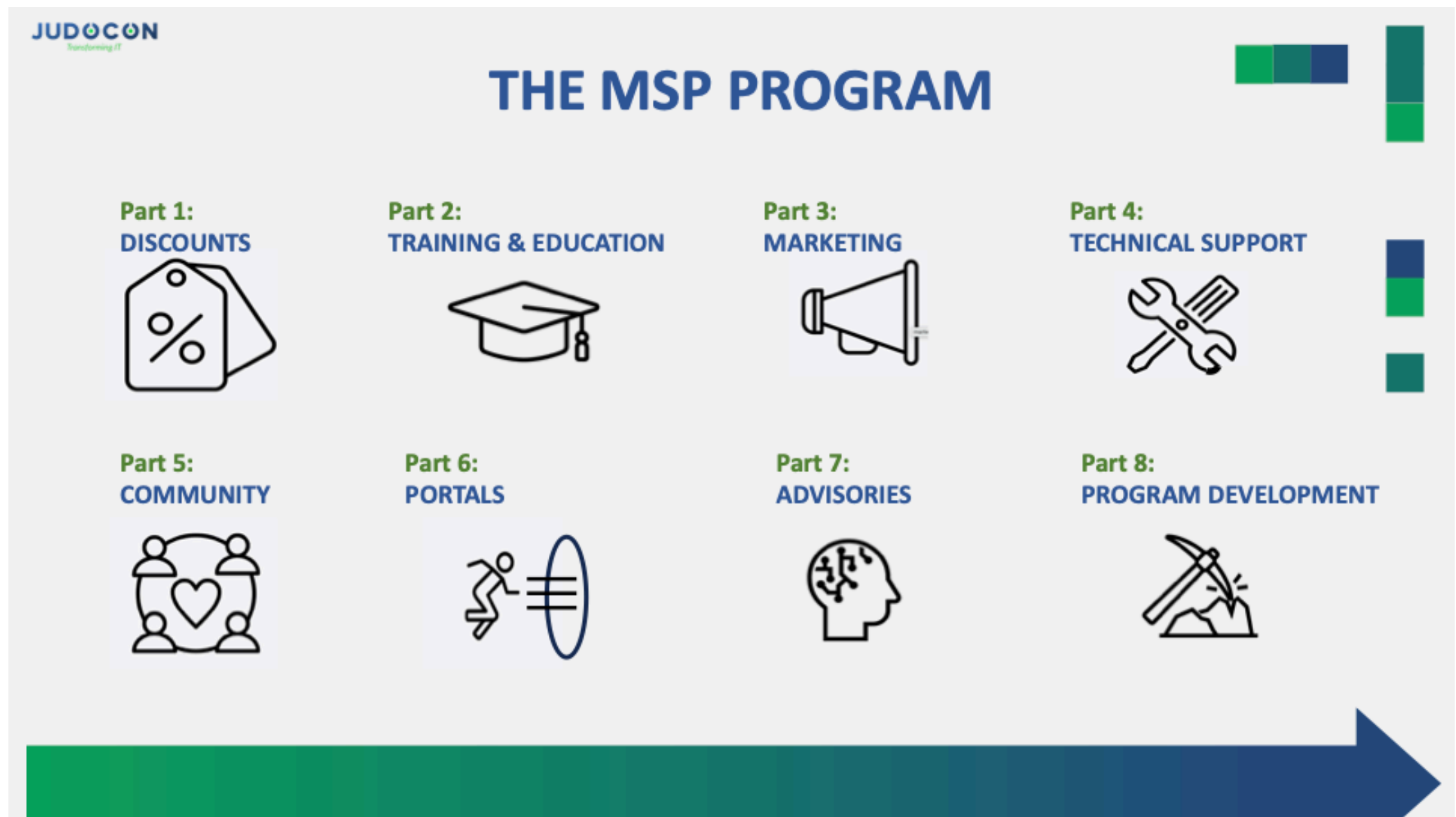
Your Ultimate Guide!

And there you have it – the ultimate guide to turning a perfectly good vendor–reseller partnership into a hilarious disaster. Remember, the key is to keep it weird, wacky, and completely impractical. Good luck, and may the partnership odds be never in your favor! What is your favorite program feature that your partners are really sold on?

Just for the records:

This is all just made up and would never ever happen in real!

Designing a MSP Program from scratch



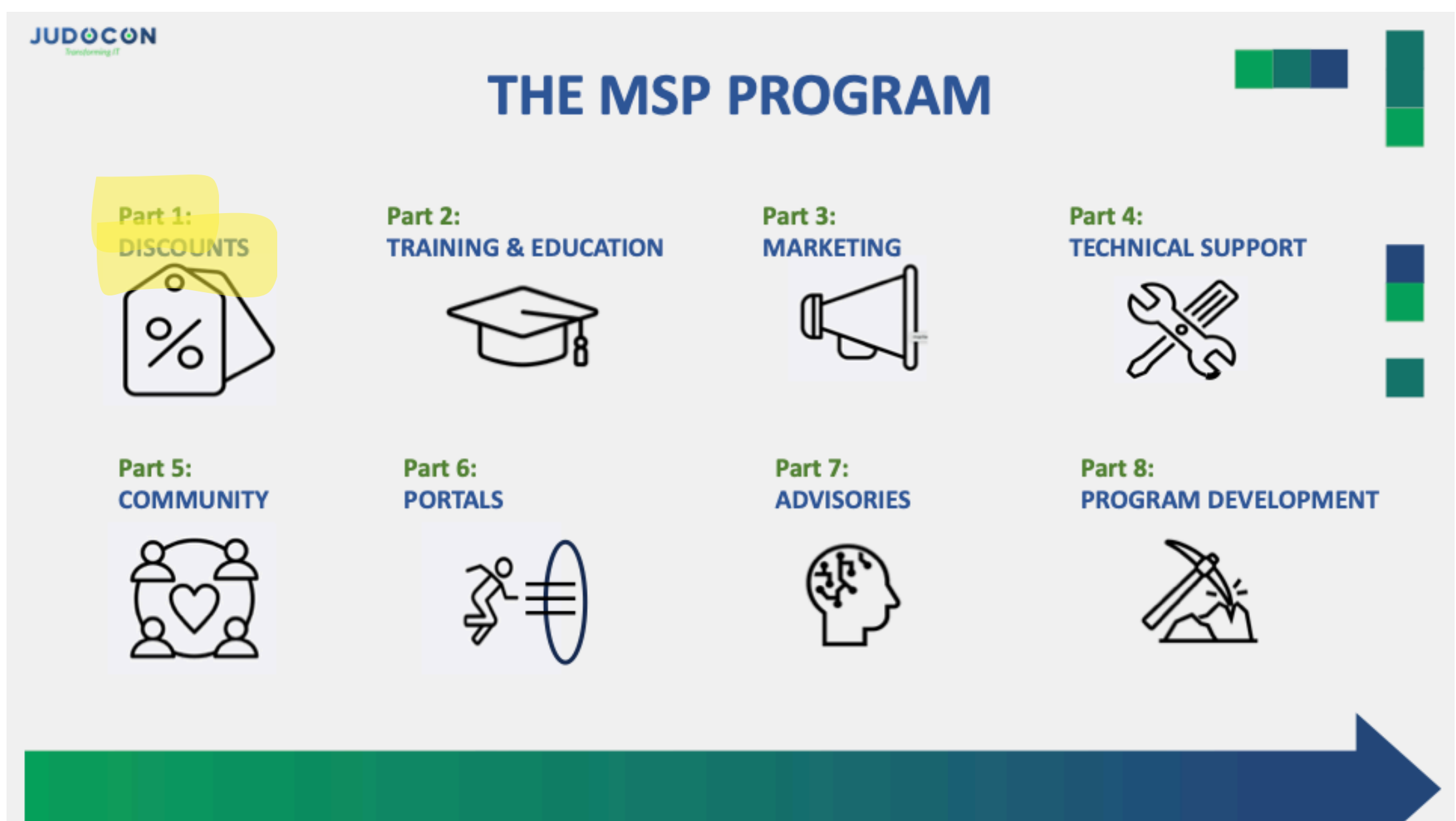
Inspired by my direct interactions with clients and conversations stemming from my previous blog articles, I wanted to provide you an overview of my considerations to spark your own reflections and discussions on MSP program topic.

Imagine having the luxury of designing a partner program completely from scratch tailored specifically for Managed Service Providers (MSPs). How would it look like? What features would you focus on and why?

Let's slip into the shoes of a MSP and design the exclusive and one-and-only partner centric [MSP Partner Program "BEYOND THE USUAL"](#)

PART 1

BEYOND DOLLARS: Unleashing Behavioral Discounts for MSPs



Why Traditional Reseller Discount Schemes Don't Work for MSPs

Discount schemes designed for Value-Added Resellers (VARs) simply don't translate to the MSP world. VARs operate on a more transactional basis, focusing on one-time product sales where back-end rebates or volume-based discounts make sense. But Managed Service Providers (MSPs) work in a continuous service delivery model, managing clients' IT environments day in and day out. Their costs are ongoing, not tied to a single sale, which makes it crucial for MSPs to have clear visibility into their cost structure at all times.

[Waiting for a rebate](#) at the end of a sales cycle isn't helpful to an MSP that needs real-time financial data to maintain service efficiency. A traditional reseller discount scheme can [disrupt MSPs' pricing models](#), forcing them to absorb costs upfront and only benefit later—if at all. This creates cash flow issues and limits their ability to stay competitive. MSPs need discounts that are immediate and can be factored into their pricing models from the start.

The Unique Cost Structure of MSPs

Managed Service Providers don't just sell products—they offer long-term services, which means their pricing must reflect ongoing delivery costs. These include automation tools, client management platforms, and continuous support for their clients. For this reason, MSPs must fully understand their cost framework and adjust their pricing accordingly to ensure profitability while delivering high-quality service.

In this environment, discounts play a pivotal role in helping MSPs maintain [competitive margins](#). However, for these discounts to be effective, they must be accessible upfront at the point of purchase. Real-time savings allow MSPs to pass along the discount to their clients, keeping their services competitively priced without sacrificing margins.

Moving Beyond Traditional Tiered Discounts

The traditional tier-based discount model, where discounts increase as spending grows, is a solid foundation but limited in its effectiveness for MSPs. These programs often focus too much on financial metrics and don't take into account the behavioral factors that lead to deeper, more successful partnerships.

For MSPs, the relationship with vendors goes far beyond the price tag. MSPs need a comprehensive partnership that supports their unique service model. Discounts [based solely on spending thresholds](#) do little to encourage the kind of behaviors that drive true collaboration and long-term success.

The Power of Behavioral Discounts

To engage MSPs more effectively, vendors should introduce behavioral discounts, which incentivize partners to invest in actions that promote growth and success for both parties. For example, MSPs that invest in advanced [technical certifications](#), participate in [co-marketing](#) initiatives, or fully adopt the vendor's [technology stack](#) should be rewarded with greater discounts.

This approach not only boosts sales but also strengthens the overall relationship. Certified MSPs are better equipped to deliver high-quality service to clients, and co-marketing efforts help both the vendor and MSP gain visibility in the marketplace. By encouraging these behaviors, vendors create a partnership that is more than just transactional—it becomes strategic.

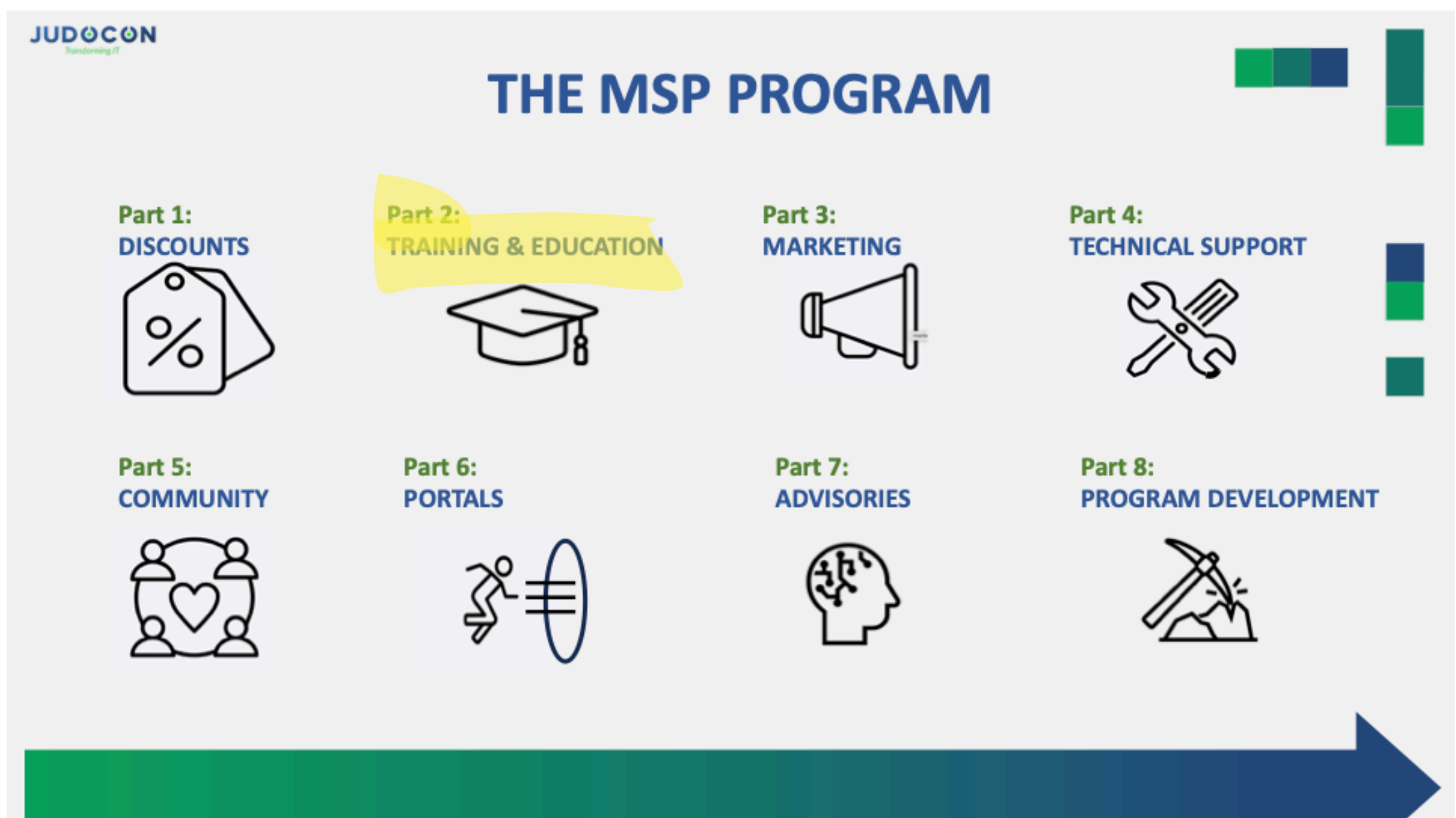
Driving Success Through Mutual Commitment

Behavioral incentives go beyond just cutting costs—they foster a deeper commitment from MSPs. When vendors reward actions like technical education and product adoption, MSPs feel more invested in the partnership. This translates into stronger service delivery, higher client satisfaction, and, ultimately, a more sustainable business model.

In summary, to truly [foster meaningful partnerships](#) with MSPs, vendors must move beyond traditional financial discount schemes. Behavioral discounts, which reward MSPs for actions that drive mutual success, are the key to creating a win-win scenario. By aligning financial incentives with strategic behaviors, both vendors and MSPs can ensure long-term growth, trust, and collaboration.

PART 2

BEYOND BASICS: The Journey to Excellence through Advanced Training Initiatives



The Need for Advanced Training in an MSP Ecosystem

Training and education are critical for every partner in a technology ecosystem, but Managed Service Providers (MSPs) require a level of sophistication that goes [far beyond the standard training](#) provided to Value-Added Resellers (VARs). For VARs, training primarily focuses on product knowledge—understanding key features, unique selling points, and how to pitch the solution to customers. This is valuable in a transactional business model where the primary goal is to facilitate a product sale.

However, MSPs operate in a different realm. Their role doesn't end at selling a product; it extends into deploying, managing, and continuously optimizing complex IT environments for their clients. For this reason, MSPs need training that dives deeper into the [technical architecture, system integration, and the automation processes](#) that form the backbone of their service offerings. Product knowledge alone won't suffice when they are tasked with running entire IT infrastructures or ensuring seamless service delivery across multiple client sites.

Beyond Product 101: Advanced Skill Sets for MSP Success

In the MSP world, technical fluency is a must. It's not enough for an MSP to know what a product does—they must understand how to integrate it into an existing infrastructure, automate its functions to reduce manual intervention, and administer it in a way that ensures reliability and scalability.

Training programs for MSPs should therefore move well beyond the basics. These programs must include advanced modules that address:

- **Architecture:** MSPs need to understand how a product fits into the broader IT landscape. This means grasping the core infrastructure and network design, as well as knowing how to ensure compatibility and scalability within diverse client environments.
- **System Integration:** Since MSPs deal with a wide variety of clients, each with their own unique IT setups, it's essential for them to be proficient in integrating new solutions into existing systems. Training should cover the complexities of integrating hardware, software, and services across different platforms and environments.
- **Automation:** Automation is critical to MSP operations as it helps reduce manual workload and ensures more consistent service delivery. Advanced training should teach MSPs how to automate processes such as system monitoring, patch management, and service reporting, allowing them to optimize efficiency and reduce the risk of human error.

Blended Learning: Tailored to MSPs' Needs

For MSPs, an ideal training scenario involves a blend of complimentary (free of charge) **online sessions** for fundamental knowledge and immersive **face-to-face courses** enriched with hands-on labs. These in-person sessions are especially valuable for tackling complex topics like integration and automation, where real-time interaction and troubleshooting can make all the difference.

To further enhance the appeal and effectiveness of training programs, vendors can offer **customized learning paths** tailored to the specific needs of each MSP. This approach can include both pre-designed modules and personalized tracks that align with an MSP's unique challenges or client requirements. While some advanced or specialized training sessions may be fee-based, offering discounted pricing for certified partners is a practice likely to be well-received.

The Importance of Certification in the MSP Ecosystem

Certifications are more than just a badge of knowledge—they are a critical lever for advancing within an MSP partner program. By making certifications a prerequisite for **moving to higher program tiers** and unlocking additional discounts, vendors incentivize deeper engagement and mastery of their product portfolios. Certification programs should integrate seamlessly with the training curriculum, providing a clear path for MSPs to follow as they enhance their skills and unlock greater benefits.

The certification program must be both comprehensive and flexible, recognizing the considerable variations in the needs of different MSPs. For widespread acceptance, it's crucial to offer a diverse array of curricula, allowing MSPs to choose either pre-existing modules or customize their educational journey based on specific operational needs or client demands.

Continuous Education: The Key to Staying Competitive

The IT landscape is constantly evolving, with new technologies and challenges emerging all the time. To stay ahead, MSPs need to engage in continuous learning. Vendors should offer not only one-time training sessions but also ongoing education programs that help MSPs stay updated on the latest features, security protocols, and best practices for maximizing the performance of their solutions.

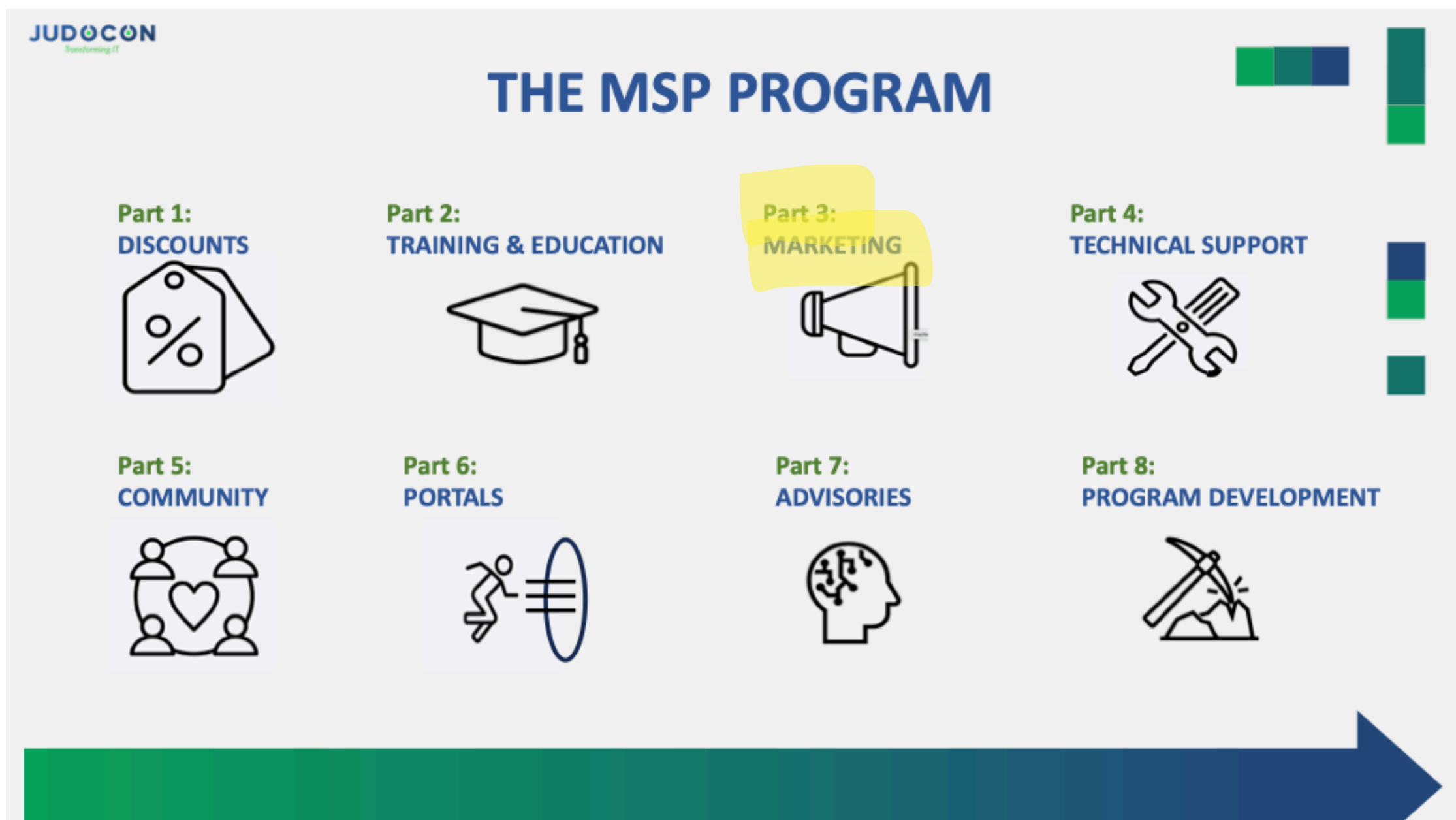
Regular certifications, hands-on workshops, and scenario-based learning environments can provide MSPs with the real-world experience they need to stay competitive. Additionally, fostering a learning culture within the MSP's organization can empower their teams to innovate, troubleshoot, and deliver higher levels of service to clients.

Conclusion: Elevating MSP Performance Through Comprehensive Training

For MSPs, training isn't just about knowing what a product does—it's about mastering how to deploy, manage, and optimize that product in complex environments. A blend of **free online sessions** and **in-person hands-on labs, customizable learning paths**, and a robust **certification program** ensures that MSPs get the depth of knowledge they need. Vendors who invest in these **comprehensive training initiatives**, including advanced modules in architecture, system integration, and automation, ensure that their MSP partners have the tools to thrive. This creates deeper relationships, drives mutual success, and guarantees exceptional service delivery in a competitive market.

PART 3

BEYOND BOUNDARIES: Crafting Triumphs with Revolutionary Co- Marketing



Before delving into the co-marketing aspects, let's take a moment to examine the fundamental distinctions between VARs and MSPs concerning their business objectives. VARs typically broaden the reach and capacity of vendors, selling the vendor's product message within their own customer base. On the other hand, **MSPs sell outcomes** within their customer base, supported by the vendor's product. The value proposition of all products and services embedded in the solution is transformed from product-specific "speeds and feeds" into a comprehensive outcome-focused value for the customer

Supporting MSPs in their marketing efforts, therefore, requires a completely different approach from the traditional VAR method. Co-marketing involves a collaborative effort where two or more partners come together to promote each other's products or services to their respective customer bases. This collaboration can take various forms, including creating shared content, [co-executing social media campaigns](#), or [offering cross-promotional deals](#). An IT vendor can significantly benefit from a proper marketing agreement with their MSP partners, as they address a distinct customer base with different needs and requirements. If executed correctly, this collaboration can serve as an excellent opportunity to gain new customer logos.

Budgets

Marketing budgets play a pivotal role in facilitating joint marketing activities, typically accrued as a percentage of the spend with the IT vendor. However, challenges arise as these funds often come with a relatively short utilization timeframe. MSPs, in contrast, tend to invest in their infrastructure through substantial patches and make bulk orders in irregular cycles. Consequently, the [irregular allocation of marketing budgets](#) makes it challenging to ensure consistency of activities over a longer period of time.

For IT vendors providing marketing budgets, it is essential to empower partners to accrue, collect, and spend the budget over an extended period. Attempting to accumulate a budget in one quarter and spending it in the next is impractical. Moreover, numerous smaller MSPs in the market accumulate modest funds through their purchases. [Extending the time frame](#) for collecting and spending funds enables them to execute marketing campaigns more seamlessly.

In addition to conventional budget distribution methods, allocating funds for [special occasions](#) adds a valuable dimension. Initiating contests for categories such as "Innovative Marketing Idea," "Architectural Excellence," "Technical White Paper," and "Best Customer Success Story" provides an opportunity to tie additional budgets to the contest. This approach not only stimulates engagement with partners but also serves as an effective means to promote the partner program..

For those hesitant about initiating contests, an alternative approach involves rewarding specific behaviors with additional budgets. Examples include budget [incentives for certifications, funds per success story, or opportunities](#) to showcase achievements at the vendor's trade exhibitions. This approach not only acknowledges and encourages desired behaviors but also contributes to strengthening the collaborative relationship with partners.

Brand Awareness

A key objective of any effective marketing partnership involves crafting [campaigns that capitalize on the strengths of both entities](#), merging the technological expertise of the vendor with the service-oriented approach of the MSP. Through collaborative marketing endeavors, the goal is to elevate brand visibility, showcase integrated solutions, and deliver valuable insights to their shared target audience. This joint approach not only reinforces their presence in the market but also nurtures a synergistic relationship that mutually benefits both parties and, ultimately, the end-users.

An IT vendor can offer specific support to the MSP by spearheading joint marketing activities that transfer the [esteemed market reputation of the IT vendor to the partner](#). In the realm of service provision, trust is paramount – trust in the provider's ability to deliver excellent services around the clock. An MSP that can demonstrate its utilization of cutting-edge technology from renowned brands in the market gains a distinct advantage over an MSP relying on lesser-known or untrustworthy IT providers for their infrastructure. To illustrate, consider the enduring impact of the "Intel Inside" logo and jingle, universally associated with servers, laptops, or PCs, signaling reliability and excellence rooted in Intel's superior technology.

Imagine your [logo affixed to the MSP's solution](#) or offering, conveying to the market that this solution is robust and ready to seamlessly serve enterprises of all sizes. To further amplify the value of the offering, associate an audit of the partner's solution with the use of this specific logo. Effectively market the logo, highlighting the value and quality it represents, along with the efforts invested to ensure your partner's capabilities in architecting, integrating, and operating solutions based on your hardware.

Marketing support

MSPs, often being small to medium-sized enterprises, thrive on automation, a key element contributing to their success. This emphasis on automation extends beyond managing IT infrastructure to encompass various aspects of their operations, including marketing and events. Marketing assistance from the IT vendor, in the form of expertise, guidance, and hands-on execution, can serve as a [significant game-changer](#) and success factor for co-marketing initiatives.

Consider the idea of offering a [Marketing Concierge or Advisory service](#) to our MSP partners. This service would be well-versed in positioning a managed service portfolio and a MSP partner as such effectively in the market, injecting fresh ideas and complementing the efforts of the partner's team. Such a supportive role can contribute immensely to the success of co-marketing endeavors.

Furthermore, IT vendors typically engage with [marketing and event management agencies](#). Why not extend access to these agencies to MSP partners, allowing them to benefit from the vendor's connections or even financial agreements with these agencies? This collaborative approach not only enriches the resources available to MSPs but also strengthens the bond between the IT vendor and its partners, fostering a more integrated and mutually beneficial relationship.

Events and Summits

Demonstrating mutual commitment is unparalleled, especially when partners join forces at events and industry summits.

Collaboration reaches new heights during joint events, where partners graciously host MSPs at significant industry gatherings. Envision a [scenario where vendors are surrounded by their premier partners at prominent summits](#). This multimedia approach aims to amplify impact by incorporating success stories, videos, and joint promotional campaigns to create a compelling narrative. Knowledge-sharing becomes a focal point, facilitated through the provision of insightful white papers that contribute to the partners' industry acumen.

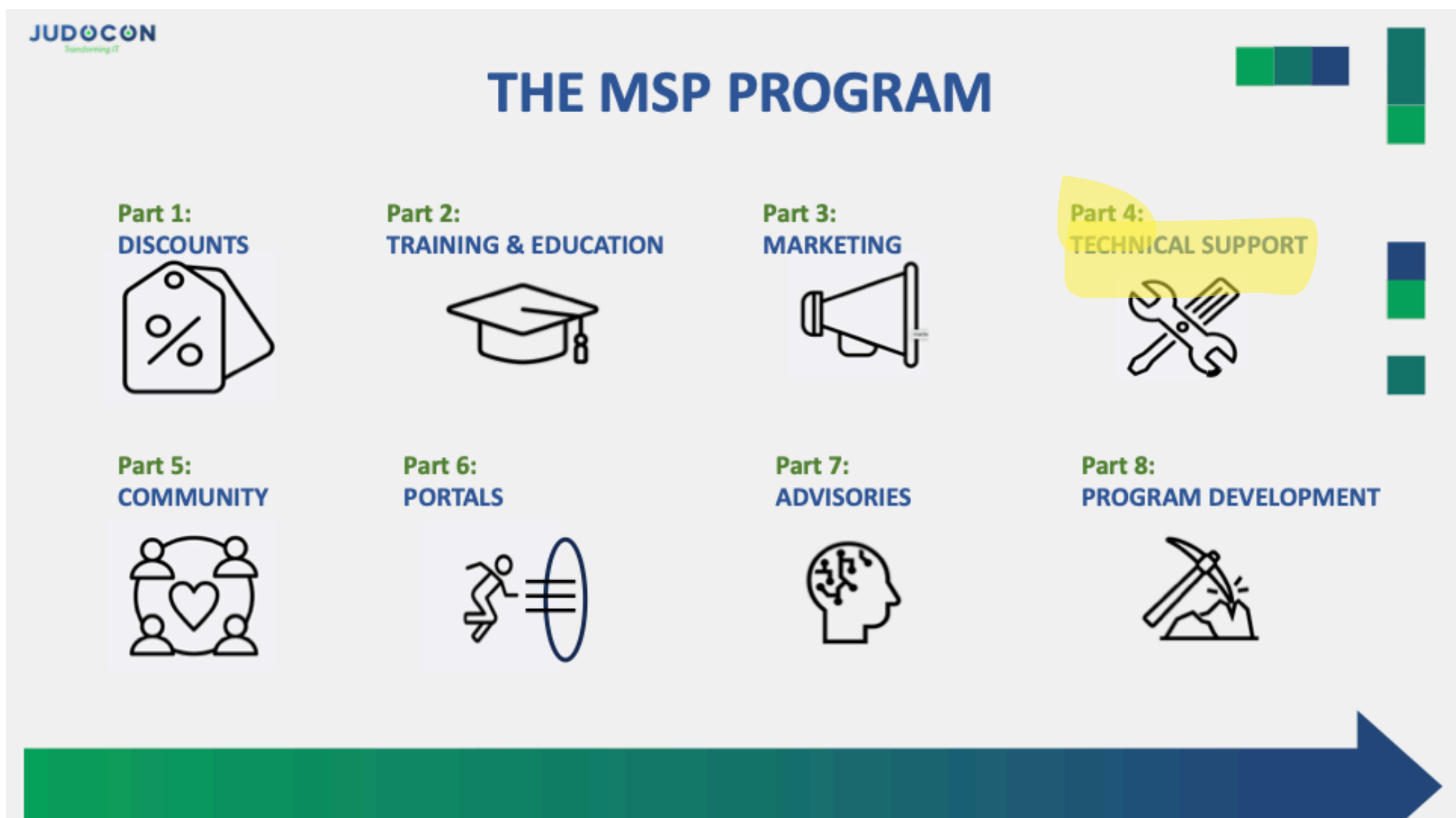
Building upon previously discussed strategies, co-selling initiatives take center stage during these events. This not only reinforces collaborative selling efforts but also sets the stage for mutual success. The collective presence of vendors and partners at such events serves as a powerful testament to their shared dedication, making a lasting impression on industry peers and potential clients alike.

Summary

In conclusion, fostering a robust partnership between IT vendors and MSPs involves a multifaceted approach, encompassing joint marketing endeavors, advisory services, and collaborative participation in industry events. By combining technological expertise with service-oriented approaches, both entities can capitalize on each other's strengths to achieve heightened brand visibility, market presence, and mutual success. This [strategic collaboration](#) not only deepens their relationship but also positions them as a formidable force in the ever-evolving landscape of IT services and solutions.

PART 4

BEYOND BUG FIXES: Redefining Client Experience with Cutting- Edge Technical Support



Considering the technical support requirements of an MSP, it's evident that they hold significantly higher expectations and standards compared to a reseller. MSPs [oversee IT operations](#) for numerous clients and must consistently deliver a seamless execution. Meeting their demands for evaluating, testing, implementing solutions, and achieving full automation of IT operations is therefore crucial for any IT vendor.

Examining technical support requirements, I propose categorizing essential features and functionalities of a MSP partner program into three areas, delineated by the phases of technical IT projects:

1. The "Product Evaluation Phase" in an IT project involves assessing and comparing potential software, hardware, or IT solutions to determine their suitability for meeting project objectives. Activities include researching options, conducting demos, and gathering stakeholder feedback to select the most appropriate solution.

2. The "Solution Implementation Phase" in an IT project encompasses the deployment, integration, and automation of chosen software, hardware, or IT solutions into the existing infrastructure. This phase includes planning, configuring, testing, and deploying the solution, leveraging automation where applicable, to ensure its successful implementation within the organization's environment.

3. The "Service Delivery Phase" in an IT project involves the continuous management, maintenance, and support of implemented solutions to ensure their optimal performance and alignment with business needs. This phase encompasses tasks such as monitoring system health, addressing user inquiries, implementing updates, and optimizing operations to sustain efficiency and reliability over time.

Product Evaluation Phase

The technical evaluation phase stands out as perhaps the most pivotal stage in the **adoption of new technology** for a Managed Service Provider, consequently influencing the sales success of any IT Vendor. A personalized approach becomes indispensable in this regard.

This necessitates the assignment of a **Technical Account Manager (TAM)** to the MSP, complemented by a team of leading technology experts, ideally offering a combination of onsite and remote support. Remote support becomes essential for expediting the resolution of any queries or challenges that may arise.

The TAM, acting as a **technical generalist and project manager**, oversees the partner relationship. They ensure the availability of technical experts, coordinate product demonstrations and POCs, and furnish technical documentation, whitepapers, case studies, and other resources to enhance the MSP's understanding of the products under evaluation.

The technical specialists furnish comprehensive technical insights into various products, ensuring that the MSP comprehends their technical specifications, compatibility with existing systems, and potential integration hurdles. **Proficiency** in the as-a-service business model is crucial for aiding in the assessment of product suitability based on the specific needs of the MSP and its clients. This entails evaluating aspects such as scalability, performance, security features, and overall alignment with business objectives.

Proof of Concepts (POCs) play a vital role in the decision-making process, empowering MSPs to make informed choices that drive business success for both themselves and their clients.

These POCs provide MSPs with hands-on experience, allowing them to assess the performance, functionality, and compatibility of various solutions in real-world scenarios. By conducting POCs, MSPs can validate vendor claims, identify potential challenges, and determine the best-fit solutions for their clients' needs. Additionally, POCs enable MSPs to showcase the value of proposed solutions to clients, building confidence and trust in their recommendations.

Since POCs demand considerable resources from both the vendor and the MSP, they must be **meticulously defined and scoped**. Ideally, they should be executed in a vendor test lab, fostering a controlled environment conducive to focused POC execution. Of course the POCs should be supported by the TAM and technical experts as required.

When executed effectively with clearly defined objectives, successful POCs can serve as the gateway to solution sales.

Last, but not least, ensure the MSP has regular access to the **vendor's roadmap** as it provides insight into the vendor's future product direction, enabling the MSP to align their service offerings with upcoming features and functionalities. This knowledge helps the MSP anticipate market trends, plan for future investments, and proactively address client needs, ultimately ensuring long-term success and competitiveness in the rapidly evolving technology landscape.

Solution Implementation Phase

The solution implementation phase is all about "time to value", "de-risking" the system changes and "simplifying the management" of the new solution. This phase requires meticulous planning, coordination, and execution to ensure a seamless transition, minimal disruption to business operations, and a fast and successful integration of the new technology.

Highly skilled and **well-established professional service teams** serve as the vital complement to MSPs' implementation teams, bringing a touch of magic to the equation.

The professional service team can offer a comprehensive migration, system integration, and automation service to the MSP, ensuring smooth transitions and streamlined operations.

Leveraging their expertise, the team assesses the existing infrastructure, identifies integration opportunities, and develops tailored migration plans to seamlessly transfer data, applications, and infrastructure components. Additionally, they design and implement customised integration solutions to connect disparate systems and deploy automation workflows to automate repetitive tasks and enhance productivity. Throughout the process, the team provides ongoing support, troubleshooting any issues and optimizing performance to maximize the benefits for the MSP and its clients.

In addition professional service teams should offer [on-site support](#) as a complementary service to MSPs. The on-site support should start during the testing phase of the solution implementation and be carried over into the service delivery phase.

This on-site support ensures that technical specialists are readily available to address any immediate needs or challenges that arise during the testing process and service delivery phase. Whether it's troubleshooting technical issues, providing hands-on assistance with deployment, or offering in-person training sessions, on-site support adds an extra layer of support and reassurance for MSPs and their clients and de-risks the operations. With on-site support, professional service teams can effectively bridge the gap between remote assistance and on-the-ground implementation, giving the MSPs operations team the time to fully get up to speed on the management of the new technology.

Service Delivery Phase

In our previous discussion, we already highlighted the importance of on-site support provided by vendors during the service delivery phase. In this section, we will shift our attention to Helpline Services, along with Solution Audits and Certifications.

Key for any [MSP-specific helpline service](#) is availability, solution expertise and adhering to Service Level Agreements.

MSPs always operate in dynamic environments where downtime can have significant repercussions for their clients. Therefore, an MSP-specific helpline service must be available 24/7 to provide timely support and address urgent issues whenever they arise.

Unlike resellers, MSPs require helpline support staffed with technical experts who possess [in-depth knowledge of the MSP's service offerings](#), infrastructure, and client environments. MSPs require expertise in holistic troubleshooting, going beyond merely addressing issues with individual vendor components. This capability involves understanding the interconnected nature of the MSP's environment, including various hardware, software, and networking elements.

Helpline staff must possess [comprehensive knowledge of the entire IT ecosystem](#) managed by the MSP, allowing them to identify root causes of issues that may span multiple systems or platforms. The previously introduced Technical Account Manager is key to ensuring the availability of

MSPs rely on [Service Level Agreements \(SLAs\)](#) to guarantee response times and resolution targets for client issues. Therefore, the helpline service for MSPs must adhere to SLAs rigorously, demonstrating high responsiveness and accountability to meet or exceed client expectations consistently.

On top of these helpline services, vendors should offer [audits](#) and [certifications](#) to their MSP partners.

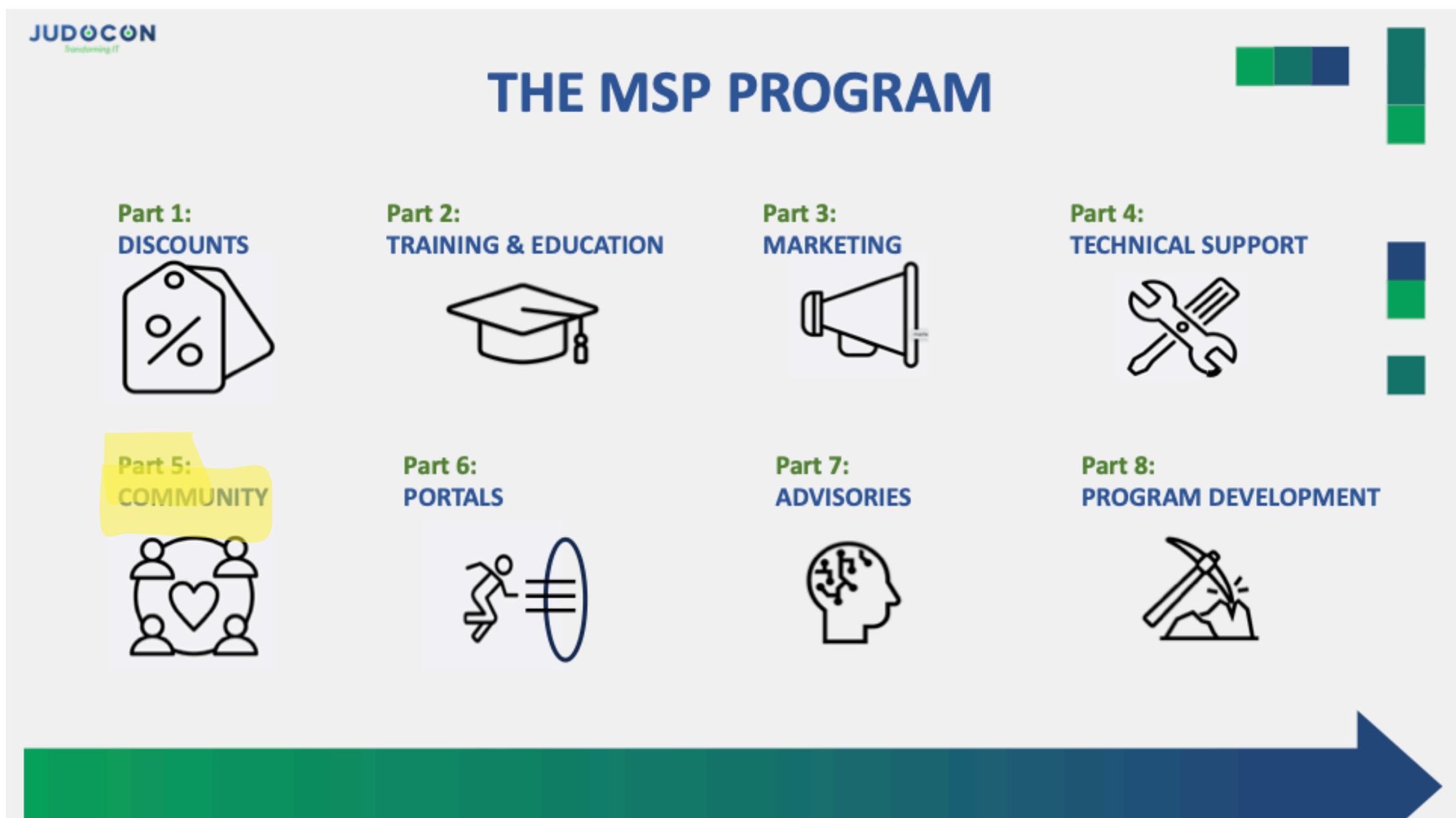
Vendor-driven audits and certifications involve rigorous assessments of the MSP's processes, procedures, and performance standards. By adhering to these standards, MSPs can ensure consistency, reliability, and quality in their service delivery, leading to greater client satisfaction and retention. Certifications will also serve as a [competitive differentiator](#) for MSPs. Holding certifications from reputable vendors enhances the credibility and reputation of the MSP within the industry. Clients are more likely to choose an MSP with recognized certifications, as it reflects a commitment to maintaining high standards of service delivery and adhering to industry best practices. Run regular audits and re-certifying the MSP will continuously document the MSPs expertise and commitment to delivering high standard services.

Conclusion

Creating and providing tailored technical support for the MSP market has the potential to revolutionize business within this particular segment. By adhering to these guidelines, MSPs will transition from being merely interested parties to enthusiastic advocates.

PART 5

BEYOND TRANSACTIONS: Building & Maintaining a Thriving Community for Techies and Sales Pros



In an industry driven by constant change and innovation, community is the key to longevity. For MSPs, creating an environment where knowledge, experience, and skills are shared regularly can be transformative. This goes beyond fostering business connections; it's about creating a thriving ecosystem where technical experts and sales teams alike are inspired to learn, engage, and grow.

As MSPs continually face new challenges in IT infrastructure, cybersecurity, and cloud adoption, a valuable community becomes essential. It provides a space where issues can be discussed, solutions brainstormed, and innovations embraced. The ultimate goal? To [bridge the gap](#) between technology and sales for mutual success.

Building a Community: A Blueprint for MSPs

1. A Platform for Engagement

The first step in creating a valuable community for MSPs is providing a dedicated space for regular engagement. This could be an online forum, a dedicated social media group, or an exclusive collaboration platform where MSP partners, technical experts, and sales teams can freely interact.

But it's not just about having a platform. It's about the quality of the interactions. A well-designed MSP partner program should encourage [participation from all levels](#), with regular virtual meetups, roundtables, and even in-person events where community members can collaborate and exchange ideas.

The community platform should be designed around knowledge sharing, offering a space for MSPs to learn from each other and leverage the collective expertise of both technical specialists and sales professionals. Success stories, use cases, and shared best practices should be the norm, along with thought leadership content that challenges the status quo and pushes the industry forward.

2. The Power of Peer-Led Learning

Building a technical or sales community requires moving away from the traditional vendor-dominated knowledge transfer model. Instead, MSP programs should prioritize [peer-led learning](#), encouraging experienced MSPs to share their insights, both successes and failures, to help others grow.

MSPs are often looking for [real-world experiences](#)—how others tackled specific implementation challenges, innovative ways to market services, or advice on the most effective sales strategies for technical products. Peer-led learning ensures that knowledge is not just theoretical but grounded in day-to-day realities.

This not only builds trust but enhances [engagement](#) within the community, as partners will see the value of learning from their peers rather than always relying on the vendor for guidance. Programs should incentivize peer contributors by recognizing and rewarding those who are active in the community.

Building a Community: A Blueprint for MSPs

1. Fostering Techie-Sales Collaboration

In many organizations, there is a gap between [technical teams and sales](#). The most successful MSP communities intentionally blur the lines, enabling cross-departmental collaboration and learning.

For example, having technical experts teach sales teams the intricacies of the products they're selling ensures that [sales professionals](#) can communicate value more effectively. Similarly, sales teams can educate technical personnel on client pain points, sales trends, and market demands, allowing for more [client-centric solutions](#).

This cross-functional interaction fuels innovation, shortens sales cycles, and allows the MSP to offer more compelling, integrated solutions. Furthermore, these exchanges [deepen relationships](#) between departments and encourage holistic thinking across the organization.

2. Regular Community Activities and Gamification

To keep the community vibrant and engaged over the long term, MSP programs should provide regular opportunities for collaboration and learning. This can take the form of:

- Monthly [webinars](#) led by technical experts or industry thought leaders.
- Hackathons or [technical challenges](#) where MSPs can work together to solve complex problems.
- [Sales competitions](#) or campaigns, where the best-performing teams or individuals are publicly recognized and rewarded.
- [Gamification features](#) such as point systems or badges for contributions, where active members earn rewards for posting valuable content, answering questions, or leading discussions.

3. Ongoing Vendor Support and Expert Engagement

Although peer-led engagement is essential, continued involvement from the vendor should not be overlooked. Vendors can foster the community by offering direct access to exclusive resources—early product updates, beta testing programs, or access to vendor experts. [Technical Account Managers \(TAMs\)](#) can take an active role in participating in community discussions, helping to answer complex questions, and offering tailored advice for specific challenges.

Beyond this, organizing annual in-person events for the community, where key members from both technical and sales teams come together to network, collaborate, and share experiences, can help to strengthen relationships and solidify the community's value.

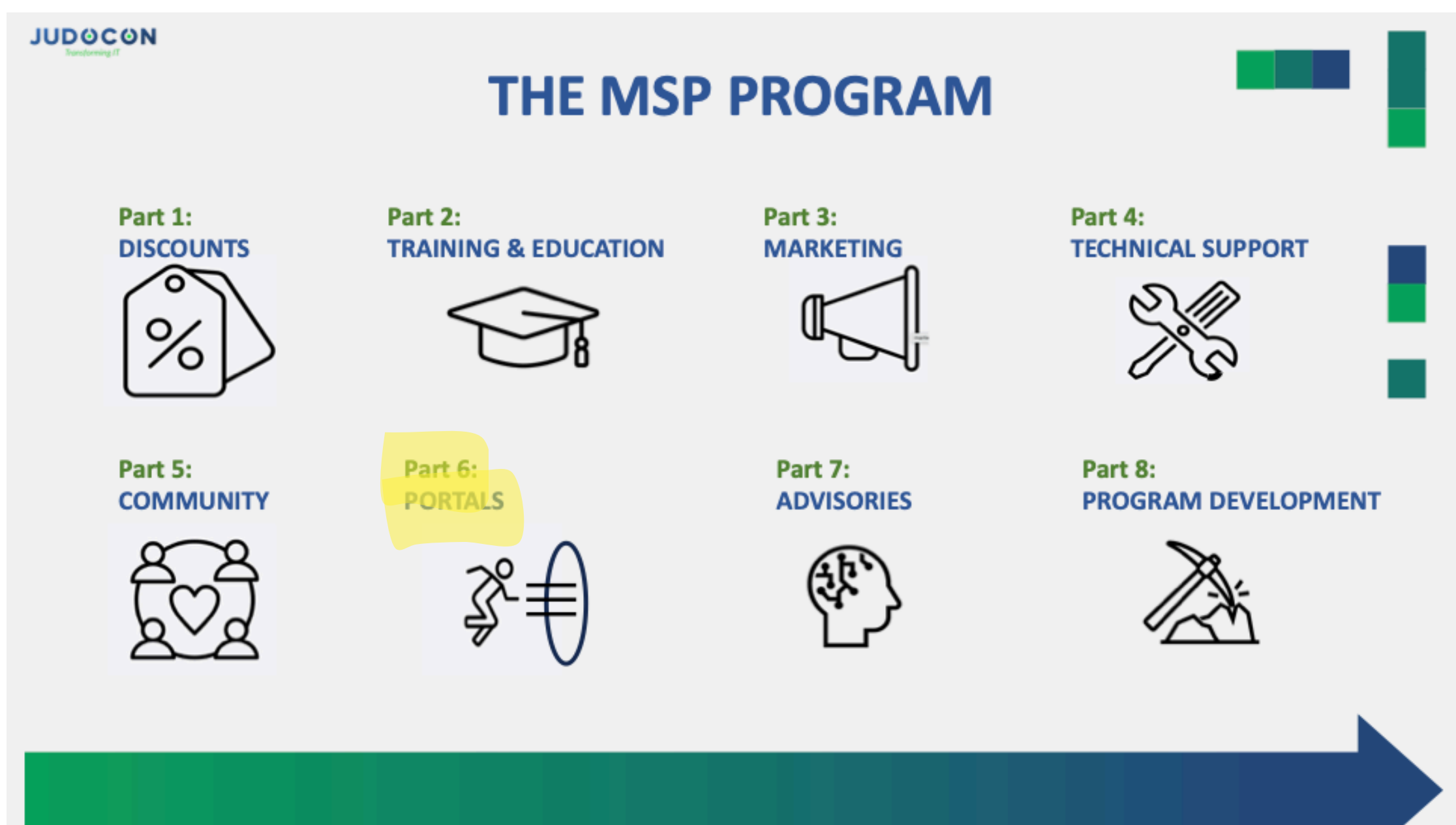
Conclusion

Creating a [thriving community](#) within an MSP partner program elevates the experience from transactional to relational. By building a strong foundation for ongoing engagement between technical and sales professionals, MSPs can create a sense of camaraderie that not only fosters growth but also positions them as thought leaders within the industry.

In the competitive MSP landscape, those who invest in building and maintaining these communities will see [lasting benefits](#)—more knowledgeable teams, faster sales cycles, and greater client satisfaction.

PART 6

BEYOND THE PORTAL: Heaven or Hell



In theory, [partner portals](#) are a vital component of any MSP partner program. They promise to streamline everything—from accessing product documentation and marketing materials to managing support tickets, tracking certifications, and even placing orders. For MSPs handling complex IT operations and multiple clients, a well-designed partner portal should be [a one-stop shop](#), offering everything in one neat package.

But here's the brutal truth: for many MSPs, partner portals often feel more like hell than heaven. They can be clunky, difficult to navigate, and filled with outdated or irrelevant information. Instead of empowering MSPs, poorly executed portals become [time-consuming, frustrating bottlenecks](#), hindering productivity and damaging the vendor-partner relationship.

So, is the partner portal a heaven-sent [resource for efficiency](#) or a hellish maze of inefficiency? Let's explore both sides of the argument.

The Case for "Heaven": The Ideal Portal Experience

When executed properly, a partner portal can be a game-changer for MSPs. Here's what a "heavenly" portal should look like:

1. Seamless Access to Critical Resources

A top-tier partner portal provides instant, [one-click access](#) to critical resources like product documentation, pricing, training, and marketing materials. Everything should be neatly organized and easily searchable. For MSPs, time is money, and they don't have the luxury of digging through layers of menus or outdated PDFs to find what they need.

An intuitive interface that works across devices is critical. If an MSP engineer needs to check the latest patch notes while on-site at a client's office, the portal should make it easy to pull up relevant information in seconds. Vendors should also ensure [real-time updates](#), so partners are always working with the most current information.

2. Self-Service Support and Automation

The best portals empower MSPs with robust [self-service capabilities](#). This means more than just opening support tickets—it means full visibility into those tickets, tracking their progress, escalating issues when necessary, and accessing knowledge bases for quick fixes.

Imagine a portal where MSPs can not only resolve common issues on their own but also [automate repetitive tasks](#), like generating usage reports or renewing licenses. By putting control directly in the hands of the MSPs, the portal becomes a force multiplier, allowing them to work more efficiently without vendor bottlenecks.

3. Customization and Personalization

Every MSP operates differently. A partner portal that allows for [customization](#)—tailoring the dashboard to show the most relevant data, adding shortcuts to frequently accessed features, or even integrating with the MSP’s internal tools—offers a far superior experience.

Personalization also extends to how vendors communicate. By using the portal to deliver personalized alerts, product updates, or tailored promotions, vendors can forge [deeper relationships](#) and maintain top-of-mind awareness.

The Case for “Hell”: When Portals Fail

On the flip side, when portals go wrong, they can push partners to their breaking point. Here’s how partner portals turn into a [nightmare](#) for MSPs:

1. Cluttered Interfaces and Outdated Information

A portal cluttered with unnecessary information is worse than no portal at all. When MSPs have to sift through irrelevant or outdated documents to find what they need, they’re wasting valuable time. This is especially true when old content is not removed or flagged properly, causing confusion about which versions of software or documentation are still valid.

MSPs need [accurate, up-to-date information](#). Outdated materials erode trust in the vendor and lead to costly mistakes, especially in high-stakes environments where MSPs are making decisions on behalf of multiple clients.

2. Poor User Experience and Lack of Integration

Nothing frustrates an MSP more than a [poorly designed user interface](#). Partner portals often suffer from clunky navigation, inconsistent layouts, and features that are buried beneath layers of unnecessary clicks.

Even worse is when the portal doesn't integrate smoothly with the MSP's own tools and systems.

If a portal [can't sync with the MSP's CRM](#), or if it forces users to re-enter data that should be auto-populated, it's no longer a useful tool—it becomes a barrier to efficiency. A lack of API integrations or support for third-party tools can force MSPs into siloed systems, slowing them down at every step.

3. Lack of Vendor Support and Responsiveness

MSPs often find themselves [abandoned](#) by the vendor when navigating the partner portal. A support system that is slow to respond or provides canned, unhelpful answers only adds to the frustration. Worse, if the portal is the only way to access support and that support channel is unreliable, the MSP is left helpless.

To make matters worse, if vendors don't [actively monitor portal performance](#) and user feedback, bugs and user complaints can go unresolved for months, further alienating partners.

The Path Forward: Turning Hell into Heaven

There's no denying that partner portals are an essential tool in any MSP program. But for vendors, the key to [turning a hellish portal into a heavenly resource](#) is continuous improvement and user-centric design. Here are some ways to achieve that:

1. Gather and Act on Feedback

Vendors should treat the portal like any other product—requiring constant iteration based on user feedback. Regularly survey MSPs about what's working and what isn't. And don't just collect the feedback—act on it.

Vendors that keep their portals updated with the latest features, improvements, and bug fixes are more likely to have satisfied MSPs who use the portal regularly.

2. Invest in Training and Support

Even the best portals can fail without proper [onboarding](#) and support. Vendors must invest in training their partners on how to navigate the portal efficiently and offer ongoing [live support](#) to help troubleshoot issues as they arise. Additionally, having a dedicated Portal Support Team or [Technical Account Manager \(TAM\)](#) ensures partners feel supported at all times.

3. Focus on Simplification and Integration

Complexity is the enemy of productivity. Portals should be simple, clean, and fully integrated with the MSP's preferred systems and tools. A clear focus on integration—whether it's connecting to CRMs, automation platforms, or other critical MSP systems—will eliminate double work and create a frictionless user experience.

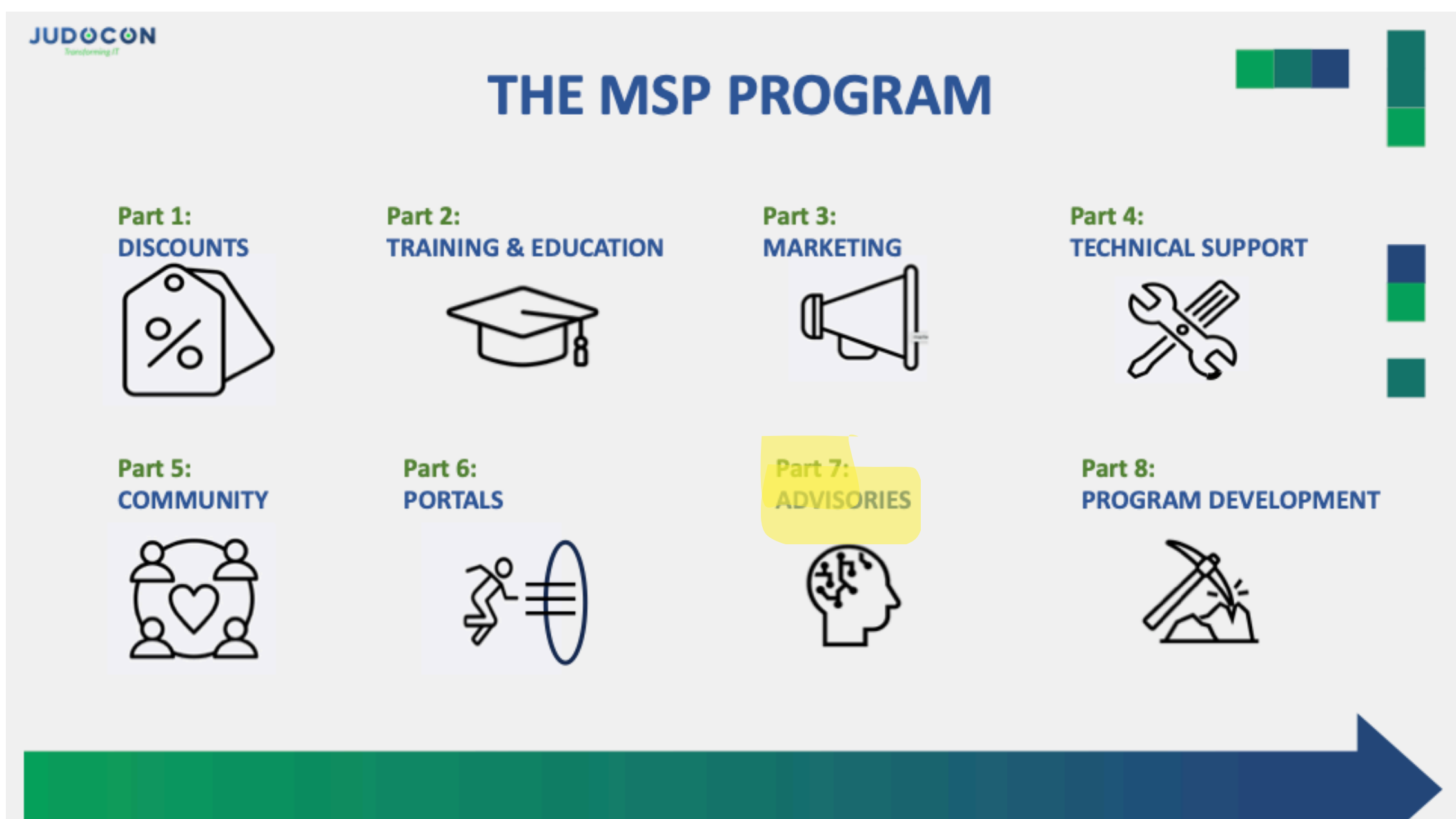
Conclusion

Partner portals can be a heavenly resource for MSPs, but only if they are designed with the end-user in mind. By simplifying access to information, enabling self-service, and investing in continuous improvements, vendors can transform a portal from a frustrating necessity into a powerful tool for success.

But when portals become too complex, outdated, or unsupported, they can feel like the seventh circle of hell for MSPs, eroding trust and [damaging the vendor-partner relationship](#).

PART 7

BEYOND FEEDBACK: The Customer Advisory Board



Building a successful MSP program requires more than internal expertise—it demands [direct input](#) from the very partners who will engage with the program. MSPs are on the front lines of service delivery, and their unique insights are invaluable in shaping a program that meets real-world needs. Integrating MSP feedback, both during the development phase and after the program’s launch, is crucial for refining the offering and ensuring it remains relevant and effective.

The Value of Early Feedback: Co-Creating the Program

From the outset, gathering feedback from a select group of MSPs can provide critical insights into what they value most and where their pain points lie. This approach—inviting partners to be co-creators of the program—ensures that the features, incentives, and support structures are [aligned with the practical realities MSPs face](#).

This feedback loop can begin in the pilot phase, where a small group of trusted partners can help you test and refine key components like the discount model, training initiatives, and technical support services. By involving MSPs early, you not only ensure the program is shaped by those who will use it but also [build trust and loyalty](#). Partners who see their input directly influencing the program will feel a deeper commitment and are more likely to advocate for its success.

Continuous Improvement: Launch and Beyond

Even after the official launch, MSP feedback should remain central to the program's ongoing evolution. Technology landscapes shift rapidly, and MSPs often face emerging challenges that may not have been evident during the initial development. Establishing a [regular feedback mechanism](#) ensures the program stays agile and continues to address new opportunities and challenges as they arise.

Regular surveys, one-on-one interviews, and post-training assessments can help [identify areas for improvement](#). Additionally, tracking KPIs such as partner satisfaction scores, training completion rates, and partner-driven innovation will highlight where further adjustments may be necessary.

The Customer Advisory Board: A Strategic Asset

One of the most effective ways to maintain an ongoing dialogue with MSPs is by establishing a [Customer Advisory Board \(CAB\)](#). This board should consist of a carefully selected group of high-performing and strategic MSPs who represent diverse perspectives, business models, and geographies.

The role of the CAB is to provide ongoing strategic input on the program's development, offering guidance on new initiatives, pricing models, support services, and product roadmaps. By regularly engaging with your most valuable partners, the CAB allows you to stay ahead of market trends, anticipate MSP needs, and remain aligned with their evolving priorities.

Benefits of the Customer Advisory Board:

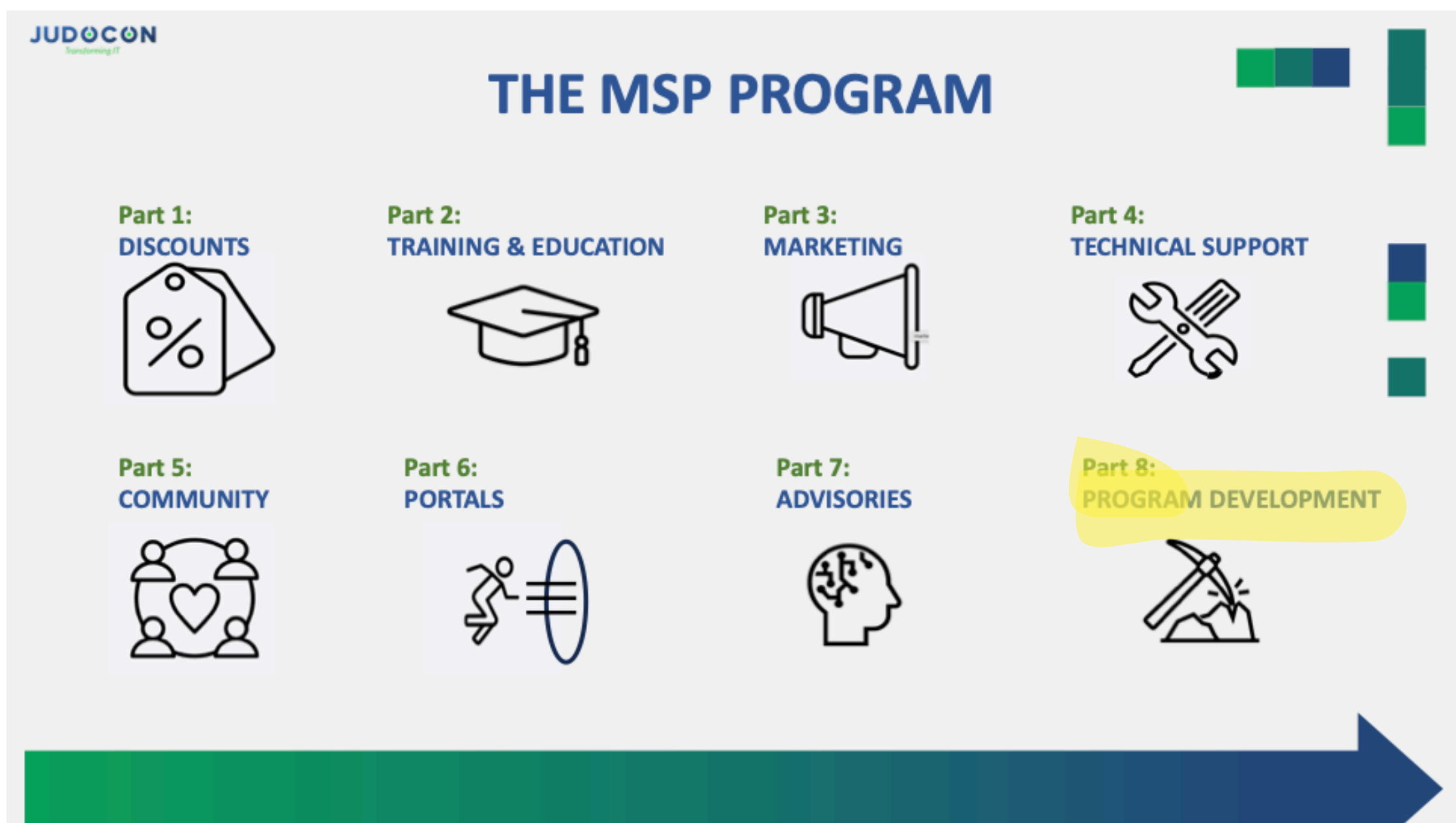
1. **Early Feedback** on New Initiatives: MSPs on the board can provide early input on new program elements, giving you a head start on refining them before a broader rollout.
2. **Stronger Partner Relationships**: By giving MSPs a seat at the table, you build deeper relationships, fostering trust and loyalty that go beyond standard partner engagement.
3. **Strategic Alignment**: The CAB helps ensure that the program continues to align with the long-term goals of both the vendor and the MSPs, supporting mutual growth and profitability.
4. **Advocacy and Ambassadors**: MSPs who serve on the advisory board can become strong advocates for the program, sharing their positive experiences with other partners and driving broader adoption.

Conclusion: Building Together

An MSP program designed in isolation is bound to miss key nuances that matter most to partners. By embedding MSP feedback into every stage of the program's development and creating a formal structure like the Customer Advisory Board, you ensure that the program is not only well-received but also evolves in a way that remains impactful and competitive. This collaborative approach reinforces the partnership, creating a win-win scenario where MSPs feel heard, valued, and supported—leading to long-term success for all parties involved.

PART 8

BEYOND ASSEMBLY: Putting it all Together



The Blueprint for Building an MSP Program – A Cross-Functional Effort

Designing and implementing a world-class MSP program like the one we've outlined across these six chapters is no small feat. It requires a comprehensive, cross-functional effort that involves multiple teams across the organization, from technical experts to marketing, sales, and customer support. This is a journey that demands careful planning, collaboration, and, most importantly, unwavering executive sponsorship.

The Role of Executive Sponsorship

Executive sponsorship is not just a formality—it is a crucial driver of success for any major program launch. At the core of the MSP program's success is the active involvement of senior leadership. Without this, the program will lack the strategic alignment and resources needed to thrive. Leaders must champion the initiative from the top, ensuring that all departments understand the program's importance and their role in making it a success. Executives should provide **clear direction**, align the program with the company's broader goals, and allocate the necessary resources to see it through. Their commitment sends a powerful message to the entire organization, reinforcing that the MSP program is a top priority that will shape the company's future.

Cross-Functional Collaboration: Key Departments

Building a program of this scope requires collaboration across several departments, each playing a critical role in its development:

- **Product and Technical Teams:** These teams are responsible for designing the solutions, ensuring they are MSP-friendly, and developing the necessary training and certification programs. They work closely with MSPs to address technical needs like system integration, architecture, and automation, creating value that goes beyond product features.
- **Sales and Marketing:** Sales and marketing teams collaborate to create compelling value propositions, driving demand for the MSP program. They are responsible for promoting the program, running co-marketing initiatives, and equipping MSPs with the resources needed to effectively sell the vendor's solutions. They also design incentive structures like behavioral discounts and ensure that pricing models are competitive yet profitable.

- **Training and Education:** This team develops and delivers training programs, ensuring that MSPs are fully equipped to deploy and manage solutions effectively. Their role is not only to educate but also to offer flexible and customizable learning paths that align with the diverse needs of different MSPs.
- **Customer Support and Success:** From helpline services to on-site support, customer success teams are integral in ensuring smooth service delivery. They help MSPs maintain high performance levels post-implementation and ensure any issues are resolved quickly, adhering to SLAs and guaranteeing customer satisfaction.
- **Finance and Operations:** Finance teams are essential for structuring discount programs, managing the financial logistics of the program, and ensuring that incentives like upfront discounts or rebates are aligned with company profitability goals. Operations teams help streamline processes and ensure that the entire program runs efficiently, from onboarding MSPs to scaling the program as it grows.

Phased Approach to Implementation

Building the MSP program should be approached in **phases**, allowing for careful development, testing, and refinement. Start by creating a pilot program with a small group of trusted MSP partners. This will give you the opportunity to test the waters, gather feedback, and make adjustments before scaling the program to a wider audience. This phased approach also helps identify any internal bottlenecks or areas that need improvement before a full-scale launch.

Aligning Goals and Metrics

To ensure the program's success, it's essential to define clear goals and establish measurable **KPIs (Key Performance Indicators)**. These might include partner satisfaction scores, training completion rates, revenue growth through MSP channels, and the adoption of new products by MSPs. Regular performance reviews and feedback loops should be incorporated to continuously refine the program and address any challenges that arise.

Conclusion: Building a Unified Vision

A successful MSP program isn't just a product or a service—it's a vision that aligns all areas of your business towards a common goal: empowering MSPs to deliver exceptional value to their clients. The commitment from executives and the collaboration across departments will create a foundation for long-term success, fostering deep relationships with MSPs and driving sustainable growth for your business.

By putting all the pieces together—advanced training, flexible incentives, technical support, and a partner-focused culture—you're not just creating a program; you're crafting an ecosystem where MSPs and vendors thrive together.

Thank You

I would like to take a moment to express my gratitude to all the wonderful individuals on both the vendor and Managed Service Provider sides who have contributed valuable insights to the conversation about what an ideal partnership program for this type of relationship should entail.

A special shoutout goes to everyone who participated in the LinkedIn discussion about creating the perfect MSP program over the past year. I have truly appreciated the varied perspectives you have shared.

Thank you, Juergen



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