



# Selecting a channel incentive solution

How to evaluate the best incentive management providers  
and platforms to meet your business goals

## Top channel leaders know that effectively managing channel incentives is crucial for success.

But *how* to do that well can be challenging. Perhaps your current program isn't living up to expectations. Or you've been trying to manage everything in-house, overwhelming your teams and keeping them from other important tasks.

This guide gives you a framework for evaluating channel incentive management providers and platforms, ensuring you get the sales, engagement and program management results you're looking for.



By the end of the guide, you'll know how to:



Navigate the selection process



Avoid common pitfalls



Ensure that your chosen solution aligns with your organization's needs

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# Understanding the current channel partner landscape

Indirect routes to market are getting more complex, and channel incentive solutions need to evolve to stay relevant. **Organizations must shift from traditional volume-based rebates to personalized incentive strategies to drive desired behaviors across many partner types.**

[Forrester's](#) 2024 Tech Tide: B2B Partner Ecosystems report identified partner incentive management solutions as a key area for investment, underscoring how important this shift is and why it needs to be implemented well.

Managing incentives and selecting the right platform can be daunting. Many organizations need a dedicated third-party provider. However, with at least 45 companies in the channel incentive management space (according to Canalis reporting), you need a proven process to choose the right partner. We'll take you through each step so you feel confident in your channel incentive management investment.

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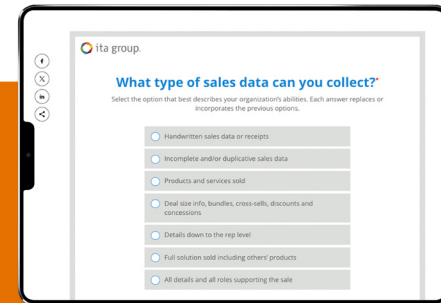
Next steps for optimizing your incentives program

# 3 steps to evolve your program's success

## STEP 1

### Evaluate your current incentive program

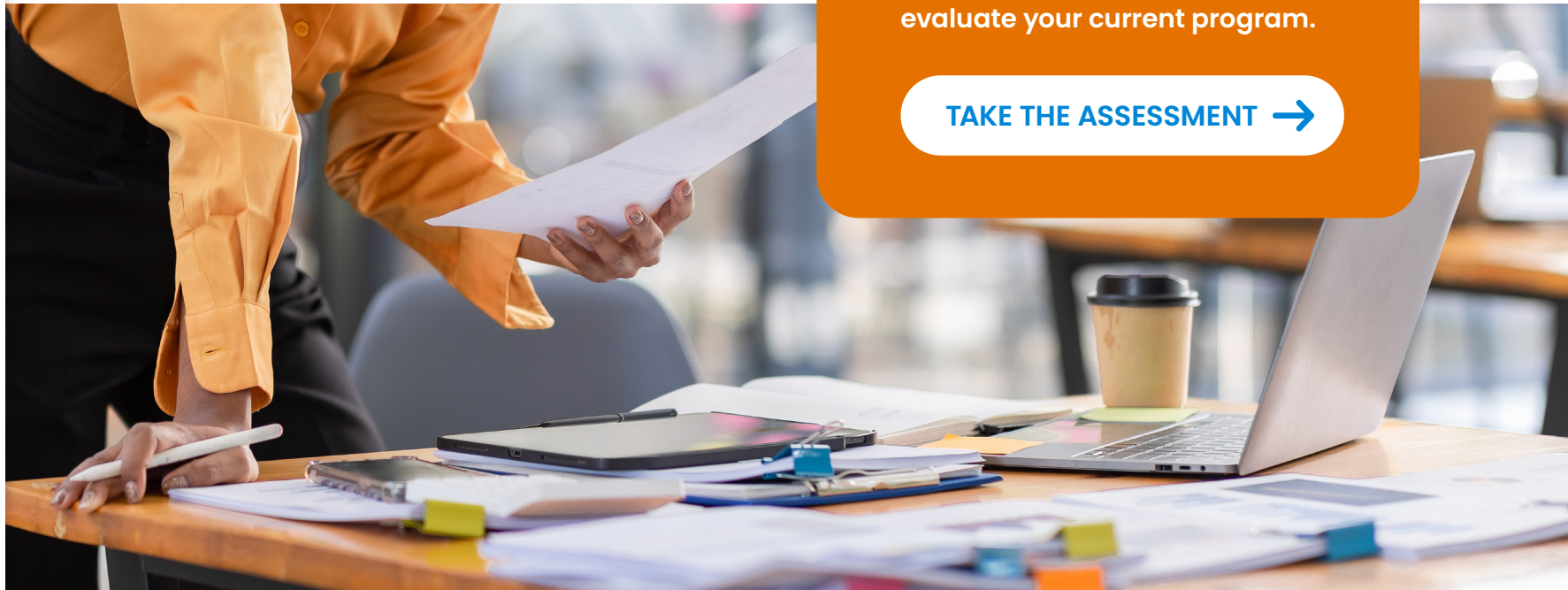
You're probably having doubts about your current program's effectiveness. Before optimizing your program with the right provider, you need to know where it's underperforming.



### ACCELERATE THE PROCESS

Use ITA Group's channel partner program online assessment to evaluate your current program.

[TAKE THE ASSESSMENT →](#)



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## Common signs you've outgrown your program



**Unsatisfied partners/sales reps:** You're struggling with participant complaints about the program that you're unsure of how address (or unable to).



**Outdated technology:** Participants say the program feels stale, without the modern features or promotions that competitors' programs offer; or, you haven't updated it in the last 3 years.



**Lackluster engagement:** You're finding only a small percentage of participants are meeting program requirements, despite your efforts to promote the program.



**Administrative burdens:** Your internal teams managing the program complain about manual processes taking time away from other priorities, or you're having unexpected program administrative costs.



**Missing data:** You and other program decision-makers lack access to meaningful program data and performance metrics, making it difficult to track ROI and performance or to adapt to rapidly changing market conditions.

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## STEP 2

### Decide on goals

Assess how your program's inefficiencies impact partner engagement, sales, performance and overall business growth. Then, develop goals to transform your program.

Successful goals are:

- > Selected with the full scope and duration of the program in mind
- > Specific and measurable (e.g., increase claims volume by 4% YOY)
- > Aligned with both "sell-in" and "sell-out" strategies
- > Flexible enough to adapt as market conditions evolve

Keep in mind, your business objectives and program goals should be aligned, but they are two distinct things.

- > Business objectives are overarching plans for the company over time.
- > Program goals reflect what success looks like for the program itself, outlining what you aim to achieve through your investment.



#### EXPERT TIP

As you evaluate providers, ask them how they would help you define and achieve your goals. The best providers bring industry benchmarks, proven frameworks and creative ideas for continuous optimization.

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## STEP 3

# Find the right incentive management provider and platform

Ultimately, the best provider offers the combination of support and channel incentive management (CIM) technology that will most effectively evolve your program and achieve your goals.

## Choosing the right incentive management platform

A robust platform delivers a personalized, data-driven channel partner experience while keeping costs in check. As you search for the right incentive management solution, consider the depth of the platform's capabilities.

### 7 key platform considerations

- 1. Scalability and adaptability:** Flexibility to add ad hoc promotions, multiple audiences and new partner types as market conditions change
- 2. Claims management and validation:** Automated claims with built-in compliance checks and audit trails reduce manual processes
- 3. Security and compliance:** Robust security measures, role-based access controls and audit logs comply with regulations and protect data
- 4. Mobile accessibility:** Performance tracking and rewards redemption offered regardless of location for on-the-go participation
- 5. Personalization and tiering:** Tiered incentive structures, personalized rewards and dynamic segmentation ensure promotions and communications are relevant to their respective audiences
- 6. Data preparation and system integrations:** Existing system integration (e.g., CRM, ERP, PRM) and robust data preparation, cleaning and reporting capabilities reduce manual processes
- 7. User experience:** Intuitive interfaces for admins and partners, including self-service portals, multilanguage support and multicurrency options, keep engagement high

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## Choosing the right incentive management provider

Technology alone is not enough. The right human support paired with technology helps achieve your goals.

### 6 key provider considerations

#### 1. Incentive program design best practices:

Expertise in designing high-impact, data-driven incentive strategies, programs and earning structures

**2. Support and training options:** Training support, a straightforward onboarding process and a participant care team that knows your programs' specific details

## WHAT CAN YOU EXPECT FROM THE RIGHT INCENTIVE MANAGEMENT PROVIDER?

### Administrator experience

- > Streamlined processes
- > Improved program engagement
- > Reduced administrative costs
- > Better data visibility and actionable insights

### Channel partner experience

- > Clear rule structures and personalized incentives
- > Consistent, targeted communications across multiple channels
- > Modern, user-friendly technology
- > Partner-first incentive design that motivates them to do more with the brand

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- 3. Transparent costs and ROI:** A clear cost structure so you know the parameters of your investment, including initial investment, ongoing maintenance costs and potential ROI
- 4. Continuous monitoring and optimization:** Proven processes for monitoring program performance, analyzing results and adjusting as needed
- 5. Change management strategy:** Support for the program's evolution and a plan to manage change within your organization, ensure buy-in from decision-makers and increase program participation
- 6. Stability and track record:** A history of proven success, unwavering support levels and a long tenure in the industry, especially during times of market uncertainty



### KNOW YOUR NUMBERS

Find out how much to spend on a incentive program with our incentive budget calculator.

[GO TO THE CALCULATOR](#) →

Our two favorite phrases are 'value-added' and 'configurable.' ITA Group came through, and continues to come through, with creative ways to improve processes with consideration for budget costs.



—MANAGER OF SALES EFFECTIVENESS OF A MAJOR TELECOMMUNICATIONS COMPANY

# Incentive management provider and platform evaluation



**Asking the right questions ensures your chosen solution delivers the results you need.** This worksheet features common questions, divided by category, to keep you organized during the evaluation process. There's also space to add program-specific questions. Download the worksheet to create multiple versions to compare providers side by side.

**Program name:**

**Business goals:**

**Audience types:**

**Current pain points:**

**Provider name:**

## Program design and flexibility

- > How flexible is the platform when creating behavior-based incentives?
- > Can we set different incentives based on partner tiers or segments?
- > How easily can we modify program rules or incentive structures midprogram?
- > Is it possible to create time-bound or seasonal promotions within the platform?
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**NOTES:**

## Partner communications

- > Does the platform facilitate targeted communications to partners (e.g., newsletters, promotions, training)?
- > Can we segment communications based on performance, demographics, etc.?
- > Are automated communications supported (e.g., points expiration, special promotions)?
- > Are multiple languages supported?
- > Are there communications templates?
- > Can we track open rates and engagement for communications sent through the platform?
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**NOTES:**



## Reward types

- > Does the platform support a wide variety of rewards (e.g., cash, points, merchandise, experiences)?
- > Can rewards be tailored to individual preferences?
- > How are rewards fulfilled and delivered (e.g., digital rewards, physical shipments)?

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## Technology capabilities

- > Will we be locked into limited configurations or can we customize it to meet our needs?
- > What CRM, ERP and marketing automation integrations are available?
- > Is there an open API for custom integrations?
- > Is SSO an option?

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## Reporting and analytics

- > Can we create custom reports and dashboards?
- > Does the platform offer predictive analytics for forecasting performance?
- > How detailed can we get with data analysis (e.g., by partner, product, region)?
- > Can we track ROI for specific incentive programs or campaigns?

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## Compliance and security

- > Is the platform SOC 2 compliant?
- > What encryption protocols are used to protect sensitive data?
- > How are user roles and permissions managed within the platform?
- > What type of fraud prevention measures are in place?

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## Partner experience

- > How intuitive is the user interface for partners?
- > Can partners access the platform via mobile devices?
- > Are there gamification elements to increase engagement?

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## Service and support

- > What types of support are provided (e.g., phone, email, chat)?
- > What are the guaranteed response times for support requests?
- > Is there a dedicated account manager?
- > What training resources are available for our team and our partners?
- > What support is offered after the build and program launch?

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NOTES:

## Global support

- > How many countries are supported?
- > Is reward parity factored into the reward options?
- > How is shipping handled by region?
- > Does participant care support multiple languages and cultural concerns?

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## Pricing

- > What are the upfront costs and ongoing costs?
- > Is there a performance guarantee?
- > Are points billed on redemption or issuance?

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# Warning signs a provider or platform is a bad fit

Not all providers and their platforms will align with your company's needs and program vision, whether it's because of size, pricing model or support levels. As you review your options, look for signs of disconnect with the provider.

## Key provider warning signs

### Lack of transparency

Reluctance to provide case studies, references or detailed answers to questions

### Lack of support

Slow response times and an unclear plan for ongoing program management

### Hidden costs

Unclear cost structures, including confusing add-ons, ongoing charges and setup fees

### Limited customization

Inability to address your company's specific needs and lack of personalization for different audiences

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# Next steps for optimizing your incentives program

You've made great progress in figuring out what to look for. Now it's time to put the plan into action!

1

Use the evaluation process in this guide to analyze your current program, define your ideal future state through attainable objectives and identify your key requirements.

2

Put the checklist to work! **Download the worksheet version** to help you organize your findings.



**DOWNLOAD WORKSHEET**

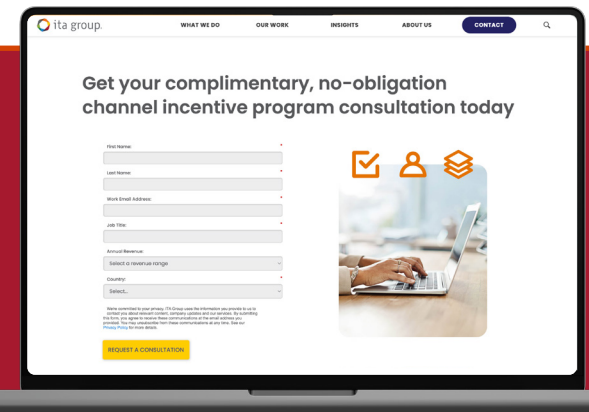
3

Take advantage of industry reports, provider websites, case studies from similar size companies and peer reviews to make the most informed decision possible.

## REMOVE THE GUESSWORK

Get personalized advice from our incentive management experts on how to optimize your channel partner program.

**REQUEST A PROGRAM ASSESSMENT →**



# Find the right incentive management solution to drive results

Let's talk—[itagroup.com](https://itagroup.com)

