Channel Incentives

THE PLAYBOOK

Design, run and scale programs that positively change behavior to support your goals

incentivizer



Incentives that Deliver

- We've designed, run and measured channel incentives for vendors of all shapes and sizes across EMEA, LATAM and APJ. This playbook distills what consistently works so you can deliver incentives that are provably effective.
- We've created this playbook to help you do the same, transforming your partner programs from cost centers into strategic growth engines that drive real business outcomes.
- Our track record speaks for itself: proven methodologies that consistently deliver uplift in deal registrations, closed revenue, and partner certifications across diverse markets and program types.

> Drawing from hundreds of successful programs, we've identified the patterns, pitfalls, and practices that separate high-performing incentives from those that fall flat. Whether you're launching your first incentive or refining an established program, this framework provides the foundation for measurable results.

Introducing the Framework

Proven to Deliver

Our tried and tested incentive framework repeatedly delivers successful incentives.

The seven phases outline the activities needed to deliver a successful incentive program, regardless of type or duration.

Phases one to four get your program ready to launch. Phases five to seven run it once it is live, so nothing falls through the cracks.



1. Discover
Foundation planning

2. Baseline Data
Establish metrics

3. Creative System
Build brand assets

4. Platform Setup
Technical build

5. Launch & Drive
Execute & engage

6. Analyze & Optimize
Track progress

7. Reward & Recognize
Fulfill prizes

Outcome Benchmarks by Incentive Type

35%
Minimum Uplift
in deal registrations

36%
Minimum Uplift
in closed deals

58%
Minimum Uplift
in certifications

Laying the Foundations

Discover

The groundwork for your incentive program are critical for success. Here’s our recommended checklist:

Identify

- **Incentive goal**: Define clear, measurable objectives aligned to business outcomes
- **Target audience**: Specify partner tiers, roles, and geographies
- **Data sources & measurement**: Establish tracking mechanisms and success metrics
- **Reporting requirements**: Determine frequency, format, and stakeholder needs
- **Realistic timeframes**: Balance momentum with achievable milestones
- **Reward design**: Model reward values and frequency against your sales numbers
- **Prize fulfillment**: Plan logistics for global delivery
- **Incentive branding**: Create memorable, behavior-aligned themes
- **Communications**: Map touchpoints and messaging cadence
- **Budget**: Separate operating costs from reward pools
- **Program terms**: Draft plain-language T&Cs early, covering tax and compliance
- **Stakeholders**: Identify decision-makers and their priorities

Top Tips



Know your stakeholders (don't have too many). Too many voices creates complexity and delays.



Run a 60-minute workshop with all stakeholders, agree the plan and establish veto rules upfront.



Start with your goal and work backwards to identify the specific behaviors that drive that outcome.



Answer two key questions: What measurable behaviors causally link to your goal? How will you track those behaviors? Limit tracked behaviors to 3 or fewer.

Know Your Data

Baseline Data

Establish the data that will be needed to measure performance and prove success. Without solid baseline metrics, you can't demonstrate ROI or make informed optimization decisions during your program.

1

Define Source of Truth

Identify primary systems for each metric (e.g. deal registrations from PRM, revenue from ERP, certifications from LMS). Establish a single authoritative source to avoid conflicting data.

2

Pull Sample Data

Extract initial sample data from each source. If you're using multiple sources, ensure the data files can be linked with a unique identifier like partner ID or email address.

3

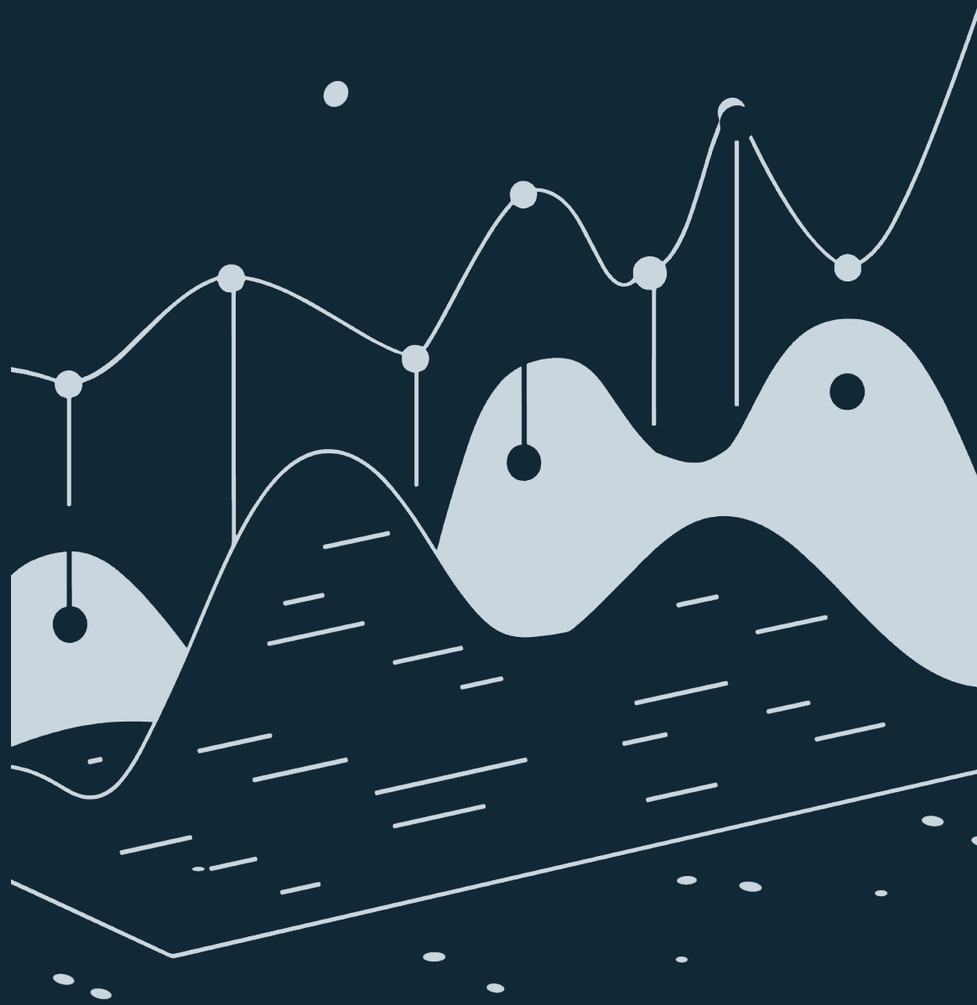
Review & Interrogate

Review, revise and interrogate the data to ensure you can get the information you need. Test your reporting queries and identify any data quality issues before launch.

4

Establish Your Baseline

Establish your baseline, the current performance level, that you'll use to measure uplift. Use at least 90 days of historical data for statistical validity.



Bring Your Incentive to Life

Creative System

Great creative assets transform an incentive from a transactional program into an engaging experience. Your branding should be memorable, aligned to the behaviors you want to drive, and consistent across all touchpoints.

- Develop a name and creative theme aligned to the behavior you want to drive. The catchier the better. Think beyond generic titles to create something partners will remember.
- Create templates with the theme for all your core assets including communications. This ensures brand consistency and speeds up production.
- Use templates to create all your marketing assets, maintaining visual cohesion throughout the program lifecycle.
- Highlight the benefits of taking part in the incentive to your partners. Make the "what's in it for me" crystal clear.

Primary Assets

- **Landing page on Partner Portal**

  Your central hub for program details and sign-up

- **Promotional flyer**

  One-page overview for quick sharing

- **Web banners**

  Various sizes for portal and website placement

- **Email signatures**

  Enable your team to promote with every message

- **Launch emails**

  Both to partners and through distributors

Pro tip: Create co-brandable assets if you're running a through-channel incentive so your distributors can easily promote your incentive with their logo.

Build Your Incentive

Platform Setup

The most successful incentives make it easy for participants to sign up, track their progress and claim their rewards.

Drive the Best Outcomes with a Platform That Provides:

Single Online Destination

Creates a central hub that increases participant engagement and level of success. Partners know exactly where to go for everything related to the program.

Self-Service Functionality

Enables participants to sign up, accept T&Cs and track their own progress without administrator intervention. This reduces your workload while empowering partners.

Gamification Features

Supports recognition of heroes and leaders through leaderboards and badges. This fuels healthy competition and motivates participants to push harder.

Analytics & Reporting

Provides real-time measurement and analytics to share with stakeholders. Make data-driven decisions and demonstrate ROI throughout the program.

Global Prize Fulfillment

Enables the fulfillment of rewards anywhere in the world, with ease. Winners receive their prizes quickly regardless of location, maintaining enthusiasm.

Create Momentum

Launch & Drive

Launch

Execute your communications plan both to and through your channel. For maximum impact, coordinate the launch in conjunction with your distributors and provide them with a comprehensive launch kit including all co-brandable assets, sample messaging, and program details.

Communicate Regularly

Keep the incentive program front and center with consistent and engaging updates so your participants know how they're doing. Support central communications with automated notifications and nudges. This ensures participants stay motivated throughout the incentive and don't forget about the program mid-cycle.

Offer Spot Prizes

Consider adding exciting spot prizes to drive participation from the start, mitigate mid-cycle apathy, and give everyone a chance to win. Random draws or first-to-achieve awards keep engagement high even for partners who aren't leading the main competition.

Critical success factor: Don't rely on a single launch announcement. Plan a full cadence of touchpoints including weekly updates, milestone celebrations, and countdown reminders as the program nears completion.

Track Progress

Analyze & Optimize

Run Your Reports

Conduct your data analysis regularly and share insights across the organization. Consistent reporting keeps stakeholders informed and enables real-time program optimization.

- Weekly operations dashboard for tactical team members who need detailed metrics
- Monthly executive summary for senior leaders who want top-line performance
- Update your platform so participants can track their own progress
- Share wins and learnings with stakeholders to build momentum and support

Consider creating an executive summary for senior stakeholders who just want top-level numbers without granular detail. Tailor your reporting to each audience's needs.

Benchmark Tracking

1

Registrations

Track who has (and hasn't!) signed up, percentage of active participants, and time from launch to registration.

2

Activity Claims

Monitor claims submitted by participants and time to first claim. Claims could include deal registrations, closed deals, training completed, certifications obtained, marketing execution, etc.

3

Results to Date

Analyze top-line metrics, breakdowns by country, region, distributor and partner. Compare pre- and post-incentive performance.

4

End-of-program Wrap Up

Comprehensive analysis and ROI calculation to inform future programs.

It's All About the Prizes

Reward & Recognize

Rewards can make or break your incentive

Get the prize strategy wrong and you'll struggle with participation. Get it right and partners will actively take part in your program over competitors'. Here's how to ensure your rewards hit the mark.

Run Your Reports

Right Prize

Base the reward(s) you offer on the level of effort required by the participant and the value delivered to your business. A $25 gift card for a six-figure deal won't motivate anyone.

Right Time

Notify winners as soon as the reward is issued or the moment the incentive ends. Delays kill excitement and reduce the perceived value of the prize.

Right Fulfillment

Make it quick and easy for winners to obtain their prize(s). Complex redemption processes create frustration and negative associations with your brand.

Top Tips

- **Global fulfillment matters**: Shipping from a single location to winners in different countries makes it easy for you but may cost a small fortune! Look for a partner that can fulfill globally and locally.
- Check geographic coverage to make sure you can deliver prizes in all participating regions. Nothing kills goodwill faster than telling a winner they can't receive their prize.
- Don't opt for slow delivery. You'll get inundated with chasers from participants wondering where their prizes are. Set expectations and exceed them.
- **Streamline data collection**: Make it easy to source and process winners' delivery details through your platform rather than manual email collection.

Keep. It. Simple.

Complexity Fuels Confusion

- Avoid having too many stakeholders. This increases requirements and complexity. Every additional voice adds competing priorities that dilute program effectiveness.
- Be clear on your target audience to ensure the incentive is relevant and your messages will resonate. Generic programs appeal to no one.
- Don't try to influence too many behaviors at once. It will put your channel off. Focus creates clarity; complexity creates abandonment.
- Offer instant-win spot prizes to maintain participation throughout the incentive so everyone can be in with a chance of winning, not just top performers.

Simplicity Delivers Results

- Participants want incentives that are easy to understand. If they need to read your T&Cs to figure out how to win, you've already lost them.
- Don't create an "admin tax" by making it complex or overly time-consuming to participate. Partners are busy, so respect their time.
- Ensure participants can easily see how they're doing and whether they're on track to win a reward. Real-time dashboards drive behavior.
- Complicated incentives disengage your audience and drive them to other vendors' incentives. Your competitors are one email away.

> "The best incentive programs are the ones partners understand immediately and can explain to their teams in two minutes."

T&Cs, Tax & Data Protection

Terms & Conditions

- T&Cs must be easy to understand. Avoid overly legal language that obscures meaning
- Consider translations if you're running an incentive in non-native English-speaking countries to ensure comprehension
- Ensure participants accept the T&Cs and you have a record of this acceptance with timestamp
- Make sure your T&Cs cover participants accepting responsibility for ensuring they're allowed to participate in their country and by their employer

Legal Responsibilities

- T&Cs are legally binding, for you and your participants, make sure they're approved by your legal counsel before launch
- Ensure you've allowed enough time to fulfill prizes. Meet those timelines or you could breach your own T&Cs and face legal exposure
- Make sure you've got all necessary data processing and GDPR permissions in place, especially for European participants

Tax Implications

- Tax laws differ from country to country
- T&Cs should specify tax liabilities clearly, making it the participant's responsibility to report and pay applicable taxes

Warning: Don't treat legal and tax considerations as an afterthought. These issues can derail an otherwise successful program if not addressed early in the Discovery phase.

Tips for Success

Incentives run on a self-serve platform perform better



Single Location

An incentive platform provides a single location for registration, T&Cs acceptance, incentive activities, reporting and prize management. No more hunting across multiple systems.



Gamification & Recognition

Reporting supports recognition, leaderboards and gamification to fuel competition. Public recognition drives behavior through social motivation.



Prize Selection

Prizes selected and claimed by participants through the platform, streamlining fulfillment and giving winners control over their rewards.



Self-Service Tracking

Participants track their own results in real-time, reducing support queries and increasing engagement as they watch their progress grow.



Automated Notifications

Push notifications can keep participants updated and engaged throughout the program lifecycle without manual administrator effort.



Continuous Engagement

Participants stay engaged throughout the incentive and queries are minimized.

Self-serve platforms don't just reduce your administrative burden; they fundamentally improve program performance by empowering participants and creating transparency.

Rewards Can Make or Break Your Incentive

Offer rewards that your participants actually want!

Amazon vouchers work really well

Universal appeal, easy fulfillment, and recipients can choose exactly what they want



Keep branded merch to a minimum

Reps don't see vendor-branded goods as a reward, they see them as marketing

Consider charity donations

Offer charitable giving as an alternative prize for socially conscious participants

Winners like a choice

Offering multiple reward tiers or prize options increases satisfaction

Physical prizes can be a nightmare to manage:

1. International shipping brings import taxes (and tariffs 😱) into play, significantly increasing costs
2. Last-mile delivery costs (and reliability) vary significantly across regions and carriers
3. Customs delays can mean winners wait weeks or months for prizes
4. Damaged or lost shipments require costly replacements and damage your brand

- Make sure you forecast and plan out fulfillment carefully, including backup suppliers and contingency budgets.
- Consider partnering with an agency that can deliver locally, anywhere in the world, eliminating cross-border shipping challenges.

Invest for Success

Budget Matters

Incentives with a larger budget (>£25k*) perform better. Adequate funding enables meaningful rewards, professional creative assets, robust platforms, and sustained promotional efforts. Under-funded programs struggle to capture attention in a competitive partner landscape.

*Minimum recommended budget for programs targeting 50+ partners

Separate Your Budgets

Separate your incentive operating budget and reward budget from the outset. Operating costs include platform fees, creative development, program management, and analytics. Reward budgets cover prizes and fulfillment. Conflating these creates confusion and under-funds critical operational elements.

Duration Drives Results

Programs with a longer timeframe (3 months+) typically perform better than isolated, short-term incentives. Extended programs allow participants to plan, adjust strategies, and build momentum. They also enable multiple touchpoints and course corrections based on interim results.

> "The ROI of a well-executed channel incentive consistently exceeds 5:1. The question isn't whether you can afford to invest. It's whether you can afford not to."

Remember: your competitors are investing in their partner programs. To win in the channel, you need programs that stand out, deliver value, and demonstrate your commitment to partner success.

Incentivizer

What is it?

Incentivizer® is a B2B SaaS platform for designing, running and rewarding channel incentive programs. Configure deal registration, sales accelerator and task-based incentives, verify claims against your data, and deliver digital rewards worldwide.

Why it Matters

Channel performance is critical: Incentives are one of the most effective levers for driving partner behavior.

Current challenges: Manual tracking, fragmented systems, and lack of visibility lead to inefficiencies and missed opportunities.

Incentivizer solves this by providing a single, intelligent platform for creating, executing, and analyzing incentive programs.

Two Ways to Run It

1. Self-serve: Your team runs the program on the platform. Start a free trial and go live in as little as 24 hours.
2. Managed program: Our dedicated team designs, launches and runs it for you, to the scope you choose. Start with a discovery call.
3. Automation: Automate tracking, validation, and payouts. Reduce admin overhead and eliminate errors.
4. Real-Time Visibility: Dashboards for performance insights. Track ROI and channel participation instantly.

Key Benefits



Efficiency: Save time and resources with streamlined workflow and processes



Transparency: Give partners clear visibility into their progress and get access to real-time reporting.



Impact: Drive measurable growth and loyalty.



Compliance: Ensure accurate, auditable processes and data.

Start a trial or talk to us at incentivizer.ai