PARTNER OPERATIONS · CHANNEL PERFORMANCE REVIEW

# Solink Reseller Channel — 12-Month Performance & Recommendations

June 2024 – May 2025 · 10 reseller partners · 104 partner-sourced opportunities · Prepared for the VP of Channel Sales

Prepared by Dico Angelo · Methodology: SUMIFS/pivot aggregation on the raw opportunity ledger; win rate computed on **closed** deals only (Won ÷ [Won+Lost]); tier attainment measured as won new-business ARR per quarter against the Tier Definitions thresholds.

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**$1.35M**
WON ARR (12 MO)
64 closed-won deals

**74%**
OVERALL WIN RATE
64 W / 23 L closed

**$242K**
OPEN PIPELINE ARR
17 live opportunities

**71 days**
AVG SALES CYCLE
on closed deals

**$21.2K**
BLENDED AVG ACV
won deals

## 1 Tier-Level Performance

How each tier performs on win rate, average ACV, and total ARR closed — and where the pattern breaks.

| TIER | OPPS | WON / LOST / OPEN | WIN RATE | AVG ACV (WON) | TOTAL ARR CLOSED | % OF A |
|---|---|---|---|---|---|---|
| Gold | 48 | 35 / 9 / 4 | 80% | $31,341 | $1,096,944 | 81. |
| Silver | 24 | 13 / 8 / 3 | 62% | $10,746 | $139,692 | 10. |
| Bronze | 32 | 16 / 6 / 10 | 73% | $7,375 | $117,996 | 8. |
| **All tiers** | **104** | **64 / 23 / 17** | **74%** | **$21,166** | **$1,354,632** | **10** |

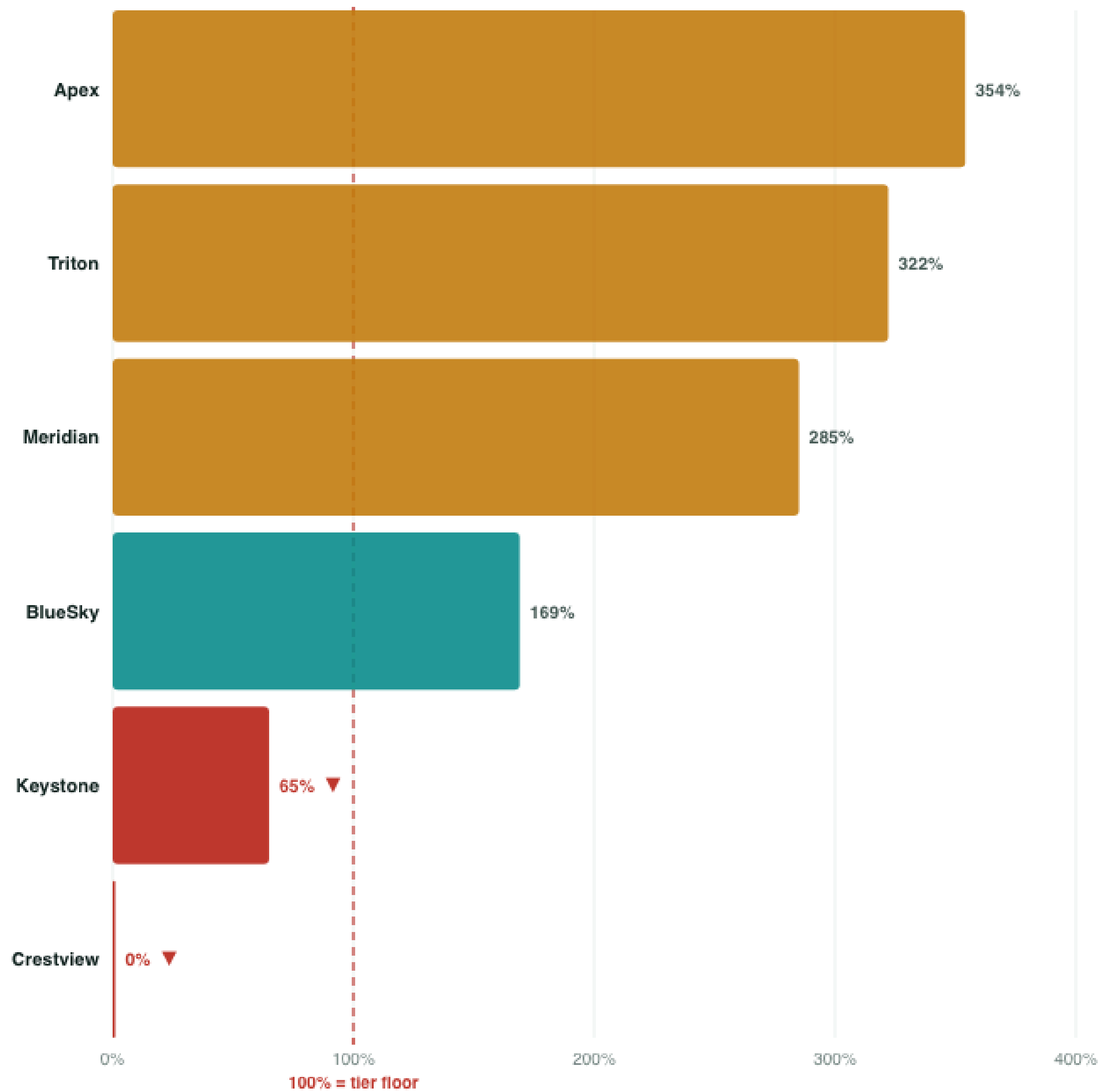
**The anomaly — the "Silver squeeze":** Silver has the **lowest win rate of any tier (62%), below even Bronze (73%)**. ACV scales cleanly with tier ($31K → $11K → $7K) and Gold drives 81% of all ARR, both expected. But the middle tier converting *worse* than the bottom tier is the surprise — Silver partners are getting Gold-scale deal complexity with Bronze-scale support (no dedicated rep), and losing deals they should win.

## 2 Partner-Level Standouts & Tier Risk

Over- and under-performers relative to tier, and the partners whose tier standing is about to move.

| PARTNER | TIER | WIN RATE | WON ARR (12MO) | Q1'25 (LAST FULL QTR) | |
|---|---|---|---|---|---|
| Apex Security Solutions | Gold | **86%** | $382,896 | $88,524 | |
| Triton Systems Group | Gold | 72% | $391,896 | $80,544 | |
| Meridian Tech Partners | Gold | **83%** | $322,152 | $71,292 | |
| Crestview Integration | Silver | 67% | $52,116 | **$0** | ⚠ r |
| BlueSky Networks | Silver | **57%** | $47,664 | $16,896 | ◆ |
| **Keystone Security Inc.** | Silver | 62% | $39,912 | **$6,480** | |
| Pinnacle AV & Security | Bronze | 71% | $38,292 | $8,556 | |
| Clearview Systems | Bronze | 67% | $31,488 | $6,228 | |
| TrueNorth IT Services | Bronze | **80%** | $31,008 | $8,376 | |
| Horizon Tech Resellers | Bronze | 75% | $17,208 | $14,712 | ◆ pip |

**Q1'25 attainment vs. tier floor** — last full quarter; bars below the 100% line are trending toward downgrade




AT RISK — DOWNGRADE (ACT THIS QUARTER)

### Keystone Security (Silver → Bronze)

Three straight quarters of decline in won new-business ARR: **$22.2K (Q3'24) → $11.2K (Q4'24) → $6.5K (Q1'25)**, with nothing closed in the partial Q2'25. Last full quarter fell **below the $10K Silver floor**. Partner note ("reliable but inconsistent pipeline") corroborates. Left alone, Keystone drops to Bronze next tier review — losing MDF and its 15% deal-reg discount, which typically accelerates the decline.

EXPECTATION GAP — VALIDATE BEFORE THE QBR

### Crestview Integration (Silver, flagged "on track for Gold")

The partner reference note says **"on track for Gold Q3 2025,"** but the data disagrees: Crestview won **$0 in Q1'25** and averages **~$13K/quarter** — well short of Gold's **$25K/quarter** threshold. This is an internal-narrative-vs.-data mismatch worth flagging, so the VP isn't forecasting a promotion the numbers don't support.

## 3 Pipeline Health

$242K of open ARR across 17 opportunities — but the shape of it carries two concentration risks.

### OPEN ARR BY STAGE

| STAGE | OPPS | ARR |
|---|---|---|
| Discovery | 7 | $157,296 |
| Negotiation | 7 | $60,576 |
| Demo Scheduled | 2 | $16,440 |
| Proposal Sent | 1 | $7,656 |

### CONCENTRATION FLAGS

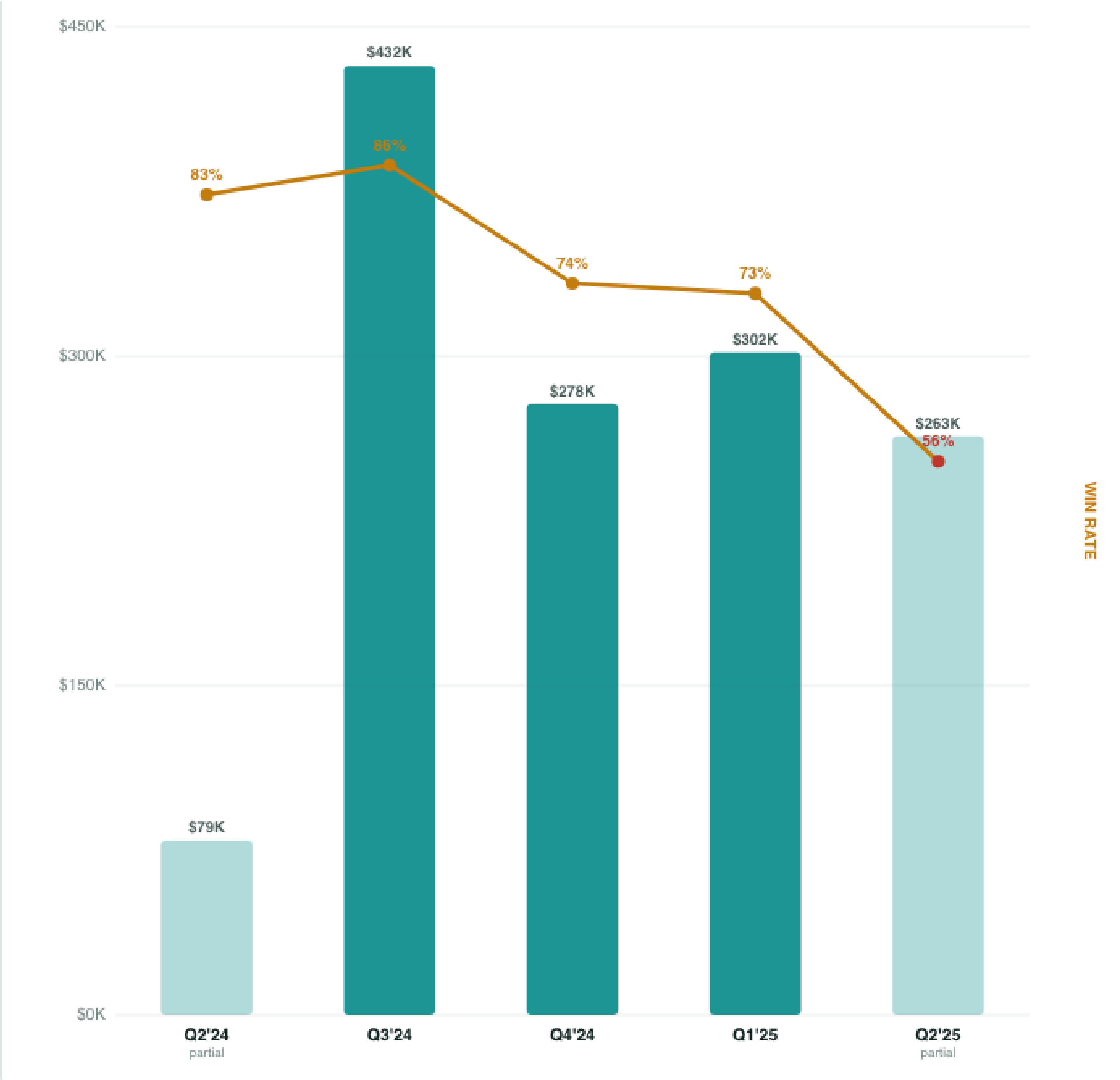
- **Early-stage heavy:** 65% of open ARR ($157K) sits in **Discovery** — the lowest-probability stage. Only $61K (25%) is in Negotiation. Weighted for stage, realistic near-term ARR is well under half the headline.
- **Geographic concentration: US Northeast ($82.8K) + Western Canada ($58.9K) = 59%** of open pipeline in two regions — both anchored by single Gold partners (Meridian, Triton).
- **Single-deal risk:** Meridian's **$82.8K** open (US Northeast) is 34% of the entire pipeline resting on one partner's deals.
- **Horizon (Bronze):** 5 of its 9 opps are open ($25.3K) yet unconverted — pipeline is building but stalling; "low engagement" note suggests an enablement gap.

## 4 Trend Over Time

Is the channel gaining or losing momentum? ARR looks healthy — but efficiency is quietly slipping.

| QUARTER | WON ARR | WON DEALS | WIN RATE | MOMENTUM |
| --- | ---: | ---: | ---: | ---: |
| 2024-Q2 (Jun only) | $79,428 | 5 | 83% | partial qtr |
| 2024-Q3 | $432,084 | 19 | **86%** | **peak** |
| 2024-Q4 | $278,172 | 14 | 74% | **▼ WR softening** |
| 2025-Q1 | $301,608 | 16 | 73% | **flat** |
| 2025-Q2 (Apr–May) | $263,340 | 10 | **56%** | partial qtr |

**Won ARR & win rate by quarter** — ARR holds while win rate slides; partial quarters shown faded




**The real signal is win-rate erosion, not ARR.** Booked ARR stays healthy ($278K–$302K across full quarters), so a revenue dashboard would show "all green." But win rate has fallen **86% → 74% → 73% → 56%** — the channel is **working harder to close the same dollars**. That's a leading indicator of softening momentum that trails ARR by a quarter or two. *Caveat: Q2'24 (June only) and Q2'25 (Apr–May only) are partial windows and are excluded from the trend read.*

## 5 Use of AI in This Analysis

Would an AI tool speed up or improve this work over time?

Yes — as a force-multiplier on the **repeatable, structural** layer, with a human owning the judgment layer. AI accelerates data cleaning, pivot/aggregation generation, first-pass anomaly detection (e.g. surfacing the Silver win-rate inversion), and drafting the narrative. The value **compounds over time**: once the tier logic, partial-quarter handling, and output template are encoded as a prompt/pipeline, every future quarter is a re-run, not a rebuild — turning a 2-hour analysis into a 10-minute refresh.

Where I keep a human in the loop: **methodology decisions** (how to treat partial quarters, whether tier is rolling or point-in-time) and **any partner-facing conclusion**. A wrong downgrade call — like acting on a naive read of Keystone without checking pipeline context — damages a real partner relationship. So: AI for speed and coverage, human for the decision and the tone.

## B Recommendations — Actionable in 30–60 Days

Three moves the Channel team can execute this quarter, ordered by impact.

**RECOMMENDATION 1 · HIGHEST LEVERAGE**

### Close the Silver win-rate gap with a shared-SE motion

**PROBLEM** Silver converts at **62%** vs Bronze's 73% and Gold's 80% — the middle tier is leaking winnable deals. Silver gets no dedicated rep today (Gold-only benefit), yet handles mid-complexity deals.

**ACTION** Pilot a **pooled/fractional SE + rep touch for Silver** on any deal >$10K ACV; add a light deal-review gate at Proposal stage.

**IMPACT** Lifting Silver to Bronze-parity (73%) on its closed volume is **~2 extra wins/quarter ≈ $30–45K incremental ARR/yr**, before any halo on retention.

**VALIDATE** The dataset has **no loss-reason field** — confirm the losses are support-driven (not price/product) before committing headcount.

**RECOMMENDATION 2 · RETENTION**

### Intervene on Keystone before the quarter-end tier review

**PROBLEM** Keystone (Silver) has declined 3 quarters straight and is below the $10K floor — a silent downgrade is queued. There's no mid-quarter alert to catch it.

**ACTION** Trigger a **QBR + targeted MDF/co-marketing push** now; give the rep a "path back to Silver" plan with the exact ARR gap and deadline.

**IMPACT** Retains a Silver partner and its benefits; avoids the downgrade→demotivation→churn spiral that removing MDF and the 15% discount tends to accelerate.

**VALIDATE** Confirm whether tier is measured on a **rolling trailing quarter** vs. calendar quarter — it changes how many days are left to act.

**RECOMMENDATION 3 · PIPELINE CONVERSION**

### Unstick the Discovery-stage backlog

**PROBLEM** **65% of open ARR ($157K) is stuck in Discovery**, the lowest-probability stage — inflating the pipeline while true near-term ARR is far lower.

**ACTION** Set a **stage-aging SLA** (auto-flag Discovery deals aging past N days) and SE-assist the top 3 by value, starting with Meridian's $82.8K.

**IMPACT** Converting even **30% of Discovery ARR ≈ $47K** pulled forward, and a cleaner, stage-weighted forecast the VP can trust.

**VALIDATE** No **opportunity-created date** in the data — stage-aging needs that field wired from Salesforce to compute precisely.

## C Process & Tooling — Automated Tier-Downgrade Alerts

Replacing the manual Salesforce-reports + Google-Sheets + email patchwork with a mid-quarter early-warning system.

### 1 · DEFINITION — WHAT "AT RISK OF DOWNGRADE" MEANS

A partner is **At-Risk** when their **quarter-to-date won new-business ARR, projected to end of quarter at current run-rate, falls below their tier floor** — or when they post two consecutive quarters of >25% QoQ decline. Three states drive everything downstream:

**HEALTHY**

**≥ 100% of floor**

Projected to hold or exceed tier threshold.

**WATCH**

**70–99% of floor**

Pace-to-date trailing; recoverable with action.

**AT-RISK**

**< 70% of floor**

Projected downgrade; auto-escalate to rep.

### 2 · WHERE THE DATA LIVES & HOW IT'S PULLED

- **Salesforce = system of record** for closed/won ARR, stage, close date, partner, region. **MindMatrix PRM** for deal registrations (leading indicator).
- A nightly **SOQL/Reports export** lands both into one flat **partner_performance** table (BigQuery, or a governed Google Sheet for a v1) — a single source of truth, no more email updates.

### 3 · HOW THE ALERT IS AUTOMATED

**PULL**

**Nightly sync**

Scheduled Salesforce Flow or Apps Script / Python cron pulls QTD won ARR per partner.

**COMPUTE**

**Attainment + projection**

QTD ÷ floor, then linear run-rate to quarter-end → assigns Healthy / Watch / At-Risk.

**ALERT**

**Push on threshold cross**

Slack alert to #channel-ops + auto-created Salesforce task on the partner's rep.

**SURFACE**

**Live dashboard**

A single tile per partner, RAG-colored — the manual sheet becomes a self-updating view.

**Lightweight v1 I can stand up quickly:** a Google Sheet fed by the SF export, with `attainment = SUMIFS(wonARR, partner, thisQuarter) / tierFloor`, a status via nested `IF`, and a time-driven Apps Script trigger that fires an email/Slack when a partner crosses <70% with 3+ weeks left in the quarter.

**I've built this exact pattern in production — it's the core of my Cloud Alliances work at Contentsquare.** On the Global Cloud Alliances team I owned the partner-ops systems this question describes:

- **PRM ↔ CRM deal-registration sync — I know MindMatrix from the buyer's seat.** Suger and Solink's **MindMatrix are the same class of partner/co-sell PRM**. At Contentsquare I ran the platform evaluation that **selected Suger over MindMatrix** — so I've assessed Solink's exact tool

directly — then operated the **Suger ↔ Salesforce** deal-registration two-way sync in production: partner registers a co-sell opp (against AWS Partner Central / ACE) → it syncs to Salesforce → stages map back → ACV/TCV and close-won propagate, partner-owned deals flagged. I've both **evaluated your PRM and run its direct equivalent day-to-day.**
- **Score-then-alert engine** — in the "Cloud Intelligence" workstream I built **pipeline-scoring / propensity frameworks and executive dashboards** off that CRM data — exactly the compute-a-status-then-surface-it pattern a tier-downgrade alert needs.
- **Partner health, generalized** — I ran a **weighted Partner Health Scoring Matrix** (~11 dimensions: mutual pipeline, account mapping, joint value prop, enablement, co-marketing, KPIs) into a single RAG score, plus per-partner **Mutual Success Plans**. Tier-downgrade is one automated signal inside that broader model.
- **Stack fluency** — hands-on admin of **Salesforce, Suger, Reveal** (account mapping / co-sell overlays) and **AWS Partner Central (ACE)** — the CRM-plus-PRM-plus-cloud-marketplace world this role lives in.

For Solink this isn't a build from zero — it's re-pointing systems I've already run: a working tier-attainment prototype for the Channel team **inside a week**, full weighted health scoring soon after.

## 4 · HOW THE CHANGE GETS COMMUNICATED

- **Internal first:** the rep gets the auto-task + Slack ping and owns the outreach — no partner ever hears "downgrade" from a system.
- **Partner-facing:** a structured **"path back to tier"** note — the exact ARR gap, days remaining, and the specific MDF/co-marketing levers to close it — framed as help, not penalty.
- **Governance:** a downgrade is only finalized at the scheduled tier review, giving partners a fair, transparent window to respond.

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Solink Partner Operations · Channel Performance Review · Data window Jun 2024 – May 2025 · Prepared by Dico Angelo. Figures computed directly from Solink_Partner_Data_Assignment.xlsx (104 opportunities). Dataset is fictional, provided for assessment. Win rate on closed deals; ARR = MRR × 12.