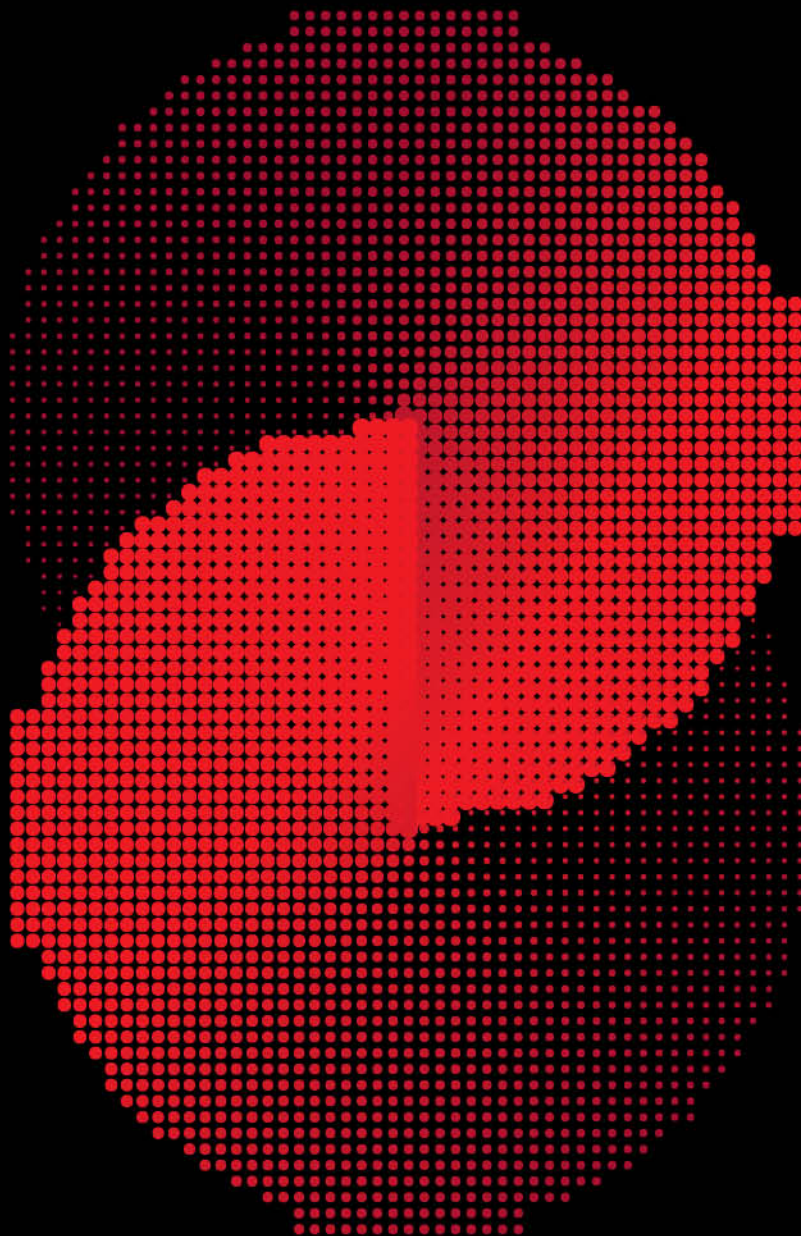


CRN **ESSENTIAL**

VENDOR REPORT 2019 **Executive Summary**



Winning the hearts and minds of tech providers

Welcome to the Executive Summary of the 2019 *CRN Vendor Report*.

Resellers, MSPs and other breeds of channel partner wield enormous influence over which technologies their clients adopt. But as this research demonstrates, the very firms that need to win their approval are doing a decidedly mixed job of impressing them.

Although some vendors shone, others were heavily marked down over perceptions their technology is outdated or buggy, their staff are unfriendly or invisible, or the associated margin opportunity is non-existent.

Across all categories, the average mark out of 10 awarded in this report was just 6.3.

Some vendors will draw encouragement from the glowing written feedback they received from the near-300 respondents in this report – and rightly so.

Sadly, just as many respondents felt they were being let down.

This includes the procurement executive who referred to one of their vendors as the “big brother you never wanted” and an IT solutions boss who accused one of his vendors of having “the worst channel strategy I have ever seen for a major corporation”.

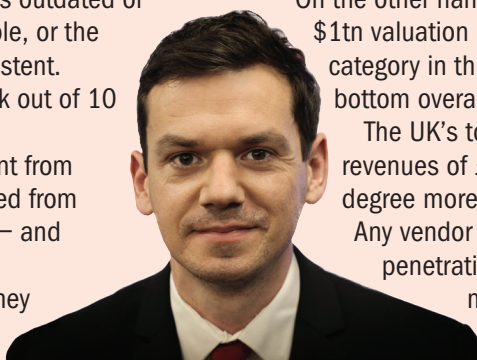
Some of the tech industry’s biggest names have fared well in this research, with HPE, Microsoft and Cisco, for instance, all finishing in the top half.

On the other hand, the first ever tech brand to reach \$1tn valuation registered the lowest mark in any category in this report, and finished third from bottom overall.

The UK’s top 300 VARs alone generate annual revenues of £19bn, and influence a good degree more.

Any vendor looking to increase their market penetration must first win over the hearts and minds of these front-line tech providers.

■ Doug Woodburn – editor, *CRN*



Overview and methodology

Resellers and MSPs rarely get an opportunity to give their vendors no-holds-barred, anonymous feedback on where they are going right and wrong.

But they were provided with a forum to do exactly this in the shape of the 2019 *CRN Vendor Report*.

Conducted between April and August 2019, the research invited resellers, MSPs and other front-line tech providers to rate up to five of their vendors on four core service categories, and back this up with written feedback.

We received nearly 300 verified responses from channel partners (see figure 1, right) large and small (see figure 2, p3). Job functions of the respondents ranged from CEOs and MDs to sales directors, COOs, CMOs and rank-and-file sales, marketing and tech staff (see figure 3, p3).

Of the *CRN* VAR 300, eight of the top 10, 33 of the top 100 and 56 of the top 300 players are represented in this research.

This is a UK-centric report, with 238 of the 289 respondents domestically based. Those from the US (45), Canada, Jersey, Ireland, Greece, Spain and India (one each) made up the balance (see figure 4, p4).

The majority of responses were generated via marketing to the *CRN* readership database. The survey was also promoted on channelweb.co.uk and social media.

Each response was carefully checked and verified. As a small token for their efforts, all verified respondents have

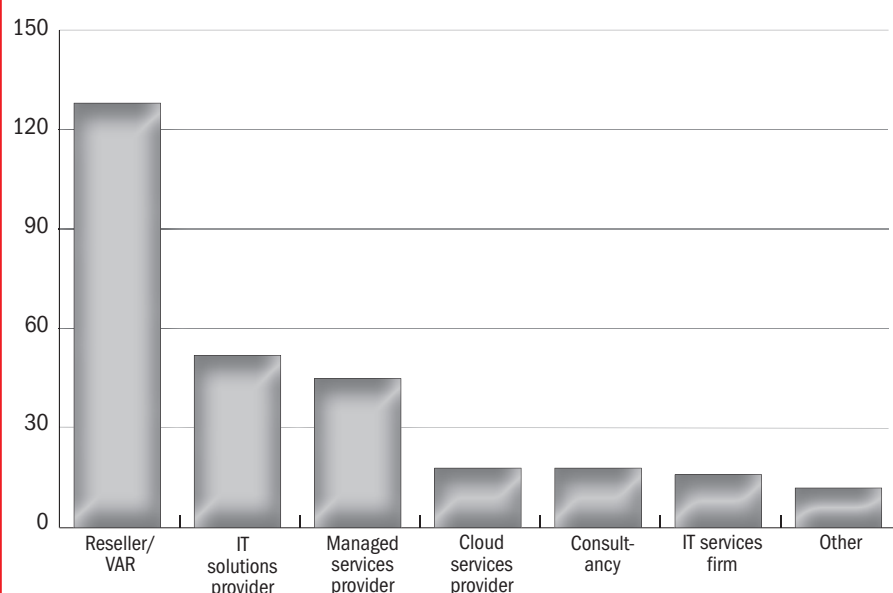
been, or will be, awarded a £3 Amazon gift voucher along with this Executive Summary of the report.

Respondents gave their answers with the assurance of complete anonymity.

The survey

Respondents were asked to select up to

1. What is the primary function of your business?



five vendors with which they had done the most business over the last year.

They were then invited to score each across four core service categories, on a scale of zero to 10.

Scores on each of these categories were combined to form an overall 'core services average'.

For instance, if Vendor A scored an average of 8.0 in Category One, 7.0 for Category Two, 6.0 for Category Three and 5.0 for Category Four, its core services average would be 6.5.

The 42 vendors included in this report are those that received the highest number of responses. With big names such as Oracle, Mitel and Pure Storage not making the cut, it is an achievement of sorts just to be included at all.

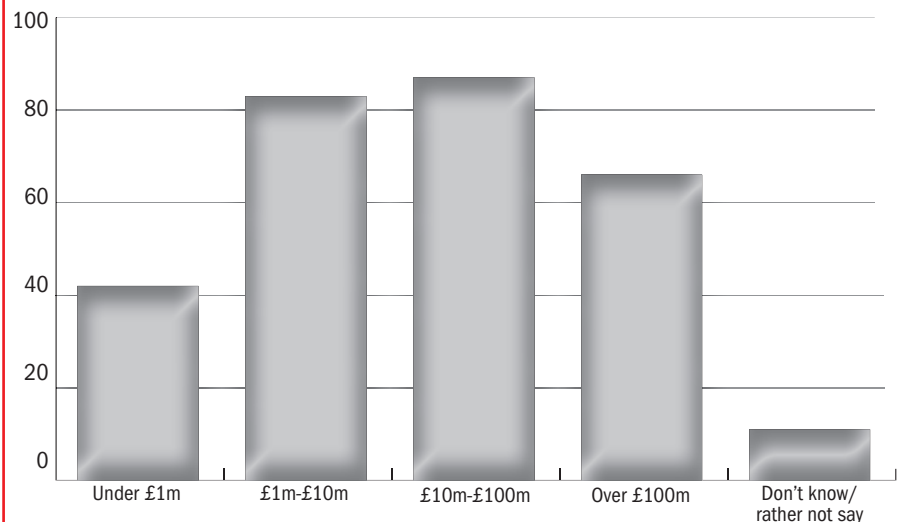
Core services categories

The four core service categories were as follows:

- Technology Leadership
 - Channel Strategy and Account Management
 - Margins, Leads and Incentives
 - Training and Accreditation
- Each category reflects a fundamental aspect of the vendor-partner relationship, namely:

- Do partners rate the vendor's products and believe in its technology vision?
- Do they have faith in its channel strategy and staff?
- Are they able to make a living selling and servicing its technology?
- Can they quickly and cheaply skill up on its technology?

2. How large is your business in annual revenues?



If the answer to any of these questions is 'no', it is a sure sign of a dysfunctional relationship.

It sounds obvious to say, but if a reseller or MSP harbours reservations about a vendor's technology vision, cannot reach its staff to resolve support issues, finds scant financial reward in evangelising its technology, or has no means of quickly and cheaply training its employees on its wares, they will find it hard to fully invest.

Indeed, this research contains numerous examples of where a failure to impress in these four categories is costing vendors hard sales.

In practice, very few vendors aced all four core services categories. This

means that even the top-performing vendors can use this research to identify areas where they can improve.

Written feedback

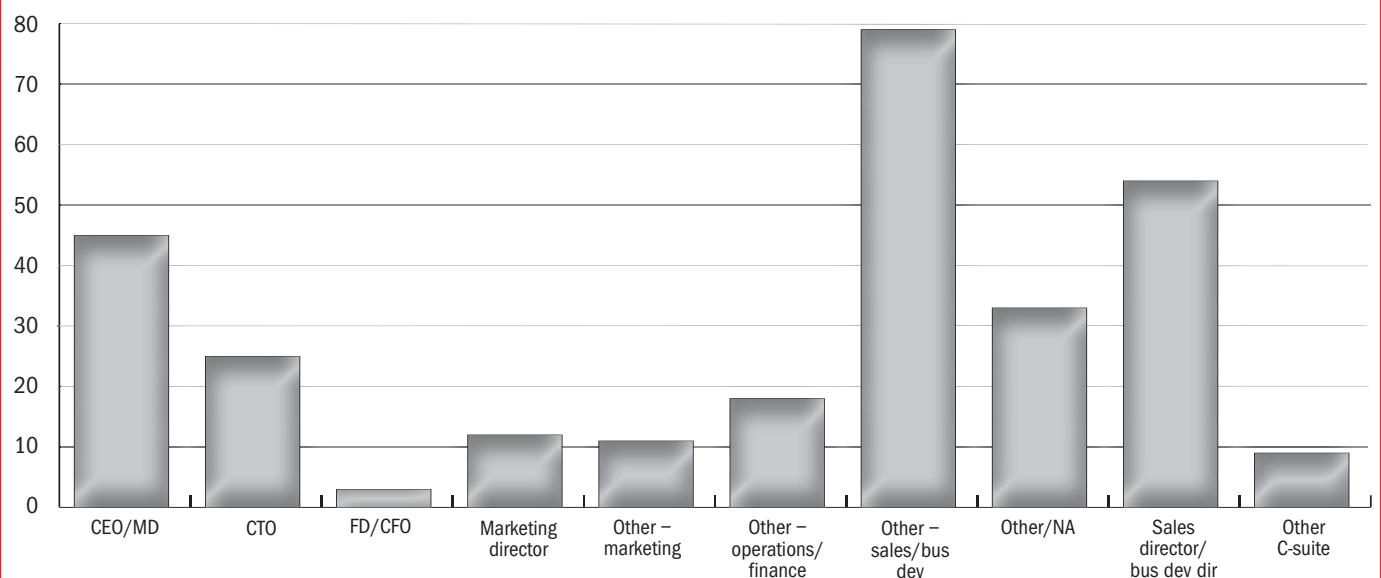
If these scores provided the bones of our study, the related comments provide the muscles and sinews.

Respondents were invited to leave detailed written feedback to justify their scores.

For the full vendor profiles (which are included only in the full report), we were only able to include a flavour of the comments submitted.

To add extra context, we have in many cases displayed how many positive, negative and mixed/neutral

3. What is your job?



comments vendors received for each category.

We encouraged respondents to be as candid as possible in their praise or opprobrium, and they duly did not pull their punches.

Some vendors were variously branded as “appalling”, “elitist” and “anti-channel”.

But respondents were just as likely to give glowing testimonials as they were to sling insults.

“They couldn’t be nicer – attentive, responsive and helpful,” read one rapturous review in the Channel Strategy and Account Management section.

“We’ve only recently started working with them again, and my God their technology is impressive,” another respondent said of a tech giant’s performance in the Technology Leadership category.

In many cases, comments were thoughtful and considered. Taken together, the written feedback adds vital context to the scores.

Additional Indices

In an addition to previous Vendor Reports, this time around we invited respondents to score their vendor partners out of 100 in three ‘bonus’ indices.

Unlike the four core services

categories, scores here did not count towards the core services average (*see p7 for all average indices scores*).

The Loyalty Index asked respondents about how much brand loyalty they feel towards their vendors.

The Durability Index tested how likely they felt the vendor in question will be a thriving, independent company in 10 years’ time.

Finally, the Satisfaction Index asked how satisfied respondents are with the relationship overall.

Although there was a strong correlation between the scores in each, and between the index scores and those in the core services categories, some interesting anomalies emerged.

These scores may not be the be-all and end-all, but important bragging rights come with topping these indices nevertheless.

Vendor performance

The full report breaks down how the 42 vendors performed in various ways, but two intriguing themes emerge when considering them as a group.

Firstly, at just 6.3, the core services average is lower than some might have expected (*see p5 for all average category scores*).

The averages were particularly low for Margins, Leads and Incentives (5.8), and Channel Strategy and

Account Management (6.0).

Clearly, many respondents felt their vendors should be giving more.

Across the 42 vendors, the core services average ranged from 7.7 to 4.7.

The highest score in any category was 8.3, and the lowest 3.4.

Although that’s a sizeable range, even the top-performing vendors evidentially have room for significant improvement across all categories.

Secondly, some breeds of vendors have clearly fared better than others.

As a rule, big, mass-market brands, antivirus vendors, and enterprise-focused, direct-selling software vendors have been marked down.

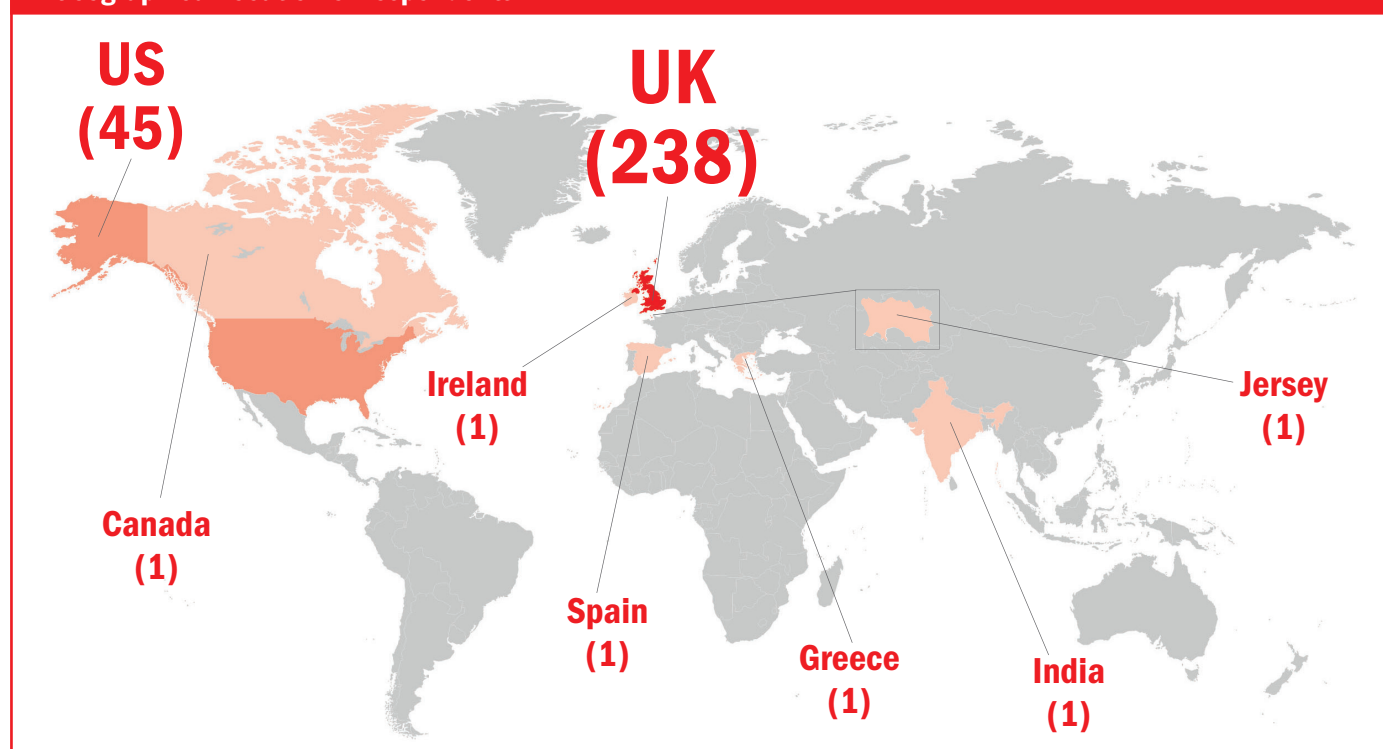
There are several exceptions to this, most notably public cloud behemoth AWS, which defied the odds to rank well inside the top half overall.

Vendors are obsessed with customer satisfaction these days – and rightly so.

But it is curious that many do not pay the same attention to how they are viewed by the tech solution providers that hold the key to the vast majority of B2B tech budgets.

We hope that this research will help redress the balance by providing a comparative guide to where vendors are failing and succeeding in the eyes of these enormously influential firms on the front line of B2B tech provision.

4. Geographical location of respondents



Vendor round-up

■ Adobe

Adobe ranked a respectable 16th overall and finished in the top half in six of the seven core categories and indices.

The creativity software giant sat in eighth place for Technology Leadership, where it was generally painted as an innovator and leader.

But written feedback was decidedly mixed elsewhere, where respondents complained about its direct sales activities and a lack of engagement with staff. Some also felt they received scant rewards for evangelising Adobe's wares.

Adobe performed well in the additional indices, however, ranking sixth for Durability and ninth for Loyalty.

■ Apple

Apple's woeful performance will only reinforce its reputation as a direct-selling behemoth that tolerates rather than embraces the channel.

The \$1tn tech brand ranked 40th overall, finishing in the bottom four in three of the four core services categories.

Respondents saw Apple as "over-priced" "very unapproachable" and "greedy", with one saying "I don't feel that Apple 'gets it' when it comes to VARs or MSPs". Despite its reputation for creating iconic products, Apple even failed to shine in the Technology Leadership category, where it ranked a mid-table 25th.

■ Avaya

Avaya had a Vendor Report to forget, finishing fourth from bottom overall and receiving a barrage of negative comments along the way.

Respondents generally characterised the comms giant as a fading force that has been blown off course by its corporate travails.

It was marked down badly on Technology Leadership and Channel Strategy and Account Management, where some respondents saw it as behind the curve and distant, respectively.

■ AWS

Amazon Web Services belied its direct-

sales heritage to come a respectable eighth in this report.

The public cloud giant finished second in the Technology Leadership category, where it was variously branded as a "clear leader", a "visionary" and "the innovator of the industry".

Scores and written feedback were more mixed elsewhere, however, with some respondents complaining that AWS remains indifferent to the channel.

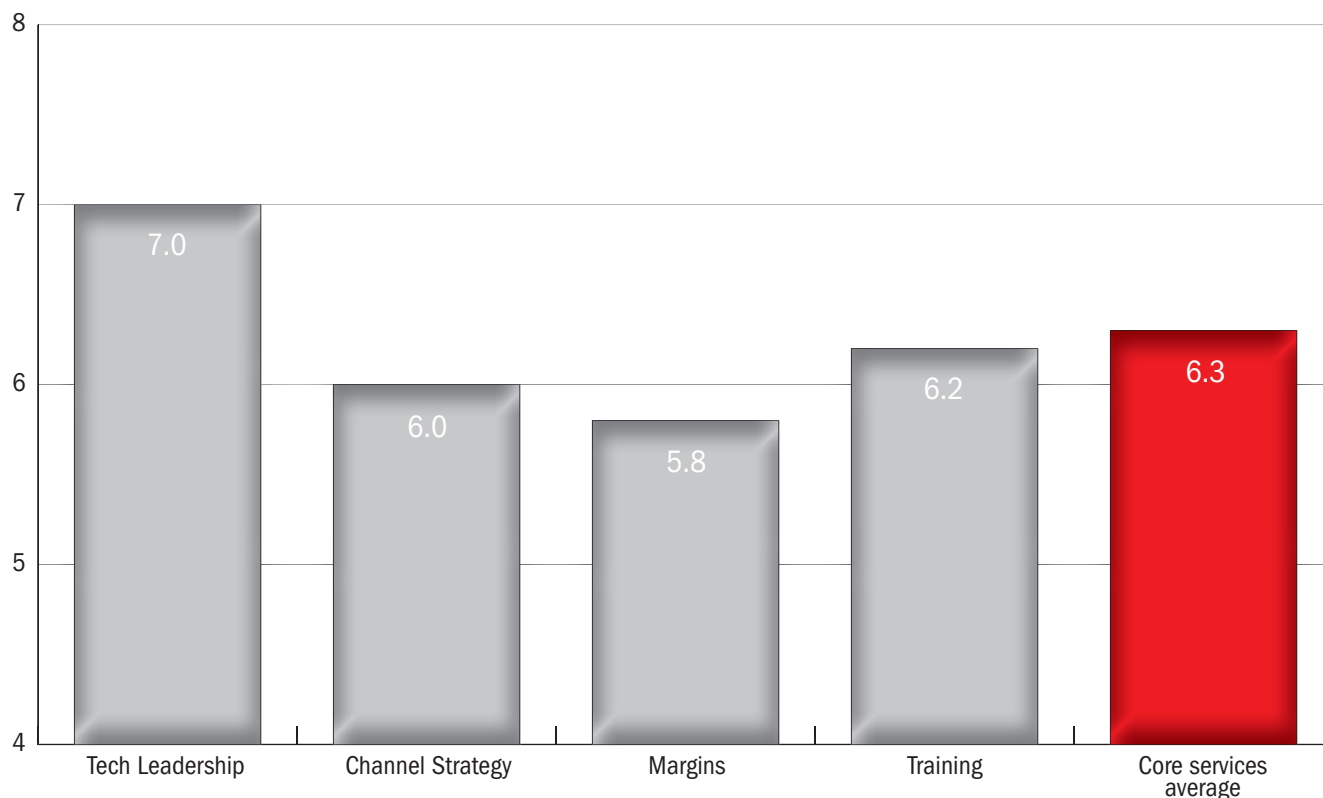
"[They are] very channel agnostic, which makes sustained investment and effort in building their brand and our sales very challenging," said one.

■ Barracuda Networks

In a barnstorming performance, Barracuda Networks ranked fifth overall and finished in the top 10 in all but one of the seven categories and indices.

With a couple of exceptions, partners were sold on the email security specialist's affordable and easy-to-use technology vision and found it easy to deal with. Some respondents felt Barracuda has room to step up its training and accreditation regime.

Average category scores (out of 10) across all 42 vendors



"Pricing is good, reseller engagement and support is outstanding, and [it has a] solid product roadmap with products that clients want to buy," said the CTO of a mid-sized partner.

■ Check Point

While not without its fans, a barrage of low scores and negative feedback for Check Point ensured it ranked 38th overall.

Several respondents felt it is overpricing its products, while not feeding enough margin to its partners.

"They continue to insist on pricing three-plus times their competitors and wonder why they are losing big customers and market share," said the sales director of a small reseller.

The network security specialist finished in the lower echelons in three of the four core categories, ranking a dismal 40th out of 42 in Margins, Leads and Incentives.

■ Citrix

Citrix ranked ninth overall, finishing in the top 10 in two of the four core services categories, namely Margins, Leads and Incentives and Training and Accreditation.

Many regarded the digital workspace specialist as a channel-friendly market leader with decent associated margins.

Its account managers drew particular praise, with one respondent saying they are "eager to work with partners to help win and develop clients".

■ Cisco

Ranking a solid 14th overall, Cisco garnered some of this report's most glowing feedback.

The networking giant's legion of loyal fans characterised it as a channel-centric market leader and industry standard bearer for training and accreditation.

"Cisco is the gold standard for training," said one respondent.

Elite partners who know their way around its systems seem to be making a decent living selling Cisco, but some smaller partners felt they are being overlooked.

The most common gripe was that Cisco is – in the words of one respondent – "vastly overpriced". The fact it was outscored by HPE in every core category barring Technology Leadership will also rankle.

■ ConnectWise

ConnectWise ranked first overall, in the process nearly pulling off a clean sweep of the four core services categories.

The RMM and PSA specialist outscored all 41 other vendors on four of the seven measures, garnering some glowing written feedback along the way. It was lauded for its "brilliant" technology, "outstanding" training and high levels of engagement with MSPs from senior level down.

Respondents used a range of superlatives to praise its ConnectWise University.

"Access to ConnectWise University means that all staff are trained to a high level and that there is consistency," said one.

■ Datto

Datto ranked 18th overall, finishing in the top half for both Technology Leadership and Margins, Leads and Incentives.

The disaster recovery and RMM player was marked down in the two other core services categories, and failed to finish in the top half in any of the three additional indices, however.

Written feedback ranged from one respondent who praised Datto for managing "80 per cent of what you want with 20 per cent of the other RMM provider faff" to another who is considering moving their business to a competitor based on the antics of Datto's sales staff.

Of its rivals, Datto marginally outscored SolarWinds MSP but finished behind ConnectWise.

■ Dell Technologies

It has been more than a decade since Dell launched into the channel, but unfortunately the vendor's direct sales legacy weighed heavily on the minds of respondents in this report.

The hardware juggernaut ranked 30th overall and finished 35th and 38th in the Satisfaction and Loyalty Indices, respectively.

Although some now view Dell Technologies as a solid, affordable alternative to HP and HPE with decent margins, an alarming number of respondents felt it is not only undercutting them but also abusing their trust. The perception that Dell's direct teams rule the roost was a widely held one.

■ ESET

Antivirus vendors have tended to fare poorly in this report, with Symantec, Trend Micro, McAfee and Sophos all finishing in the bottom half overall.

ESET emerges as an exception to this rule, ranking third overall and receiving

some glowing comments right across the board.

Despite topping Margins, Leads and Incentives and ranking in the top six in two other categories, bubbling tensions emerged over its direct sales tactics and a botched partner portal rollout.

"Their products are good, their promises for future development over-egged somewhat and their new partner portal has been an utter disaster," said one respondent at a small reseller.

■ F5 Networks

F5 Networks doesn't appear to have upped its game since finishing in the lower echelons of the 2017 *Vendor Report*.

The application delivery ace ranked 35th overall this time around.

Although respondents generally felt they can make a good living selling and servicing F5's technology, some characterised it as an arrogant partner with expensive technology and an antiquated approach to channel management. Its deal registration scheme emerged as a particular source of annoyance.

■ Forcepoint

Back in 2014, Forcepoint's reputation for competing against partners, low-quality products and shambolic tech support saw the firm – then still named Websense – finish a woeful 46th out of 50 in that year's *Vendor Report*.

This time around, the 'human-centric security' vendor finished a mid-table 22nd overall, garnering some positive comments about its technology strategy and "warmer and friendlier" attitude towards the channel along the way. The Austin-based outfit has also outperformed most of its peers this time around, including Symantec, Sophos and Juniper.

"I think Forcepoint have a good handle on the direction they need to go in from here," said the vendor alliance manager of a small VAR/reseller.

■ Fujitsu

Fujitsu is on a mission to push more of its product business through the channel, and that shows in the solid scores and feedback it achieved in this report.

The Japanese vendor was a consistent, mid-table performer, ranking 23rd overall but finishing in the top 10 for Channel Strategy and Account Management, as well as in the Satisfaction Index.

Although not all partners are convinced it has a clear technology

strategy, the warm written feedback it received shows it is generally well thought of among its partner base.

■ Google

Google endured a mixed Vendor Report, acing the Technology Leadership category, but garnering tepid marks and comments elsewhere.

Ranking 32nd overall, the cloud giant scored some rave reviews for its tech wizardry, with one IT solutions provider dubbing its product roadmap “second to none”.

Another respondent, who described its account managers as “ghosts”, summed up the mood elsewhere, where Google’s scores and written feedback was largely lukewarm.

■ HP Inc

HP Inc ranked 14th overall, finishing inside the top 15 in three of the core services categories.

The PC and printer goliath won widespread plaudits for its affordable, comprehensive and stylish products, channel-friendly outlook, above-average margins and accessible training schemes.

Some respondents marked the vendor down over concerns it is undercutting them with HP Store, however.

Despite this, HP bested arch rivals Lenovo and Dell across the board.

■ HPE

HPE was a consistently strong performer, ranking sixth overall and finishing in the top 10 in six of the seven categories and indices.

Running a direct sales operation often leads to conflict, but in HPE’s case the majority of respondents felt the enterprise tech vendor is juggling the two activities with aplomb.

Although some respondents felt its tech is overpriced and its systems unwieldy, it was generally portrayed as a proactive, fair and generous ally. It also outscored Dell and Cisco, as well as former stablemate HP Inc.

■ IBM

IBM ranked 26th overall, garnering consistently average scores across the board.

The numbers only told half the story, however, with the written feedback at times reading like respondents were rating two different vendors.

While some painted Big Blue as a legacy player with labyrinthine channel schemes and a penchant for competing against partners, others lauded its Watson AI technology and channel-

focused ethos. IBM did at least outscore enterprise software rivals SAP and Salesforce.

■ Intel

Intel ranked a mid-table 21st overall, but respondents generally characterised it as a slightly arrogant market leader with overpriced technology.

Several expressed concerns that the chip giant’s supply issues are leaving the door open to a rejuvenated AMD.

“Market leader – yes – but supply has been poor this past year,” said one.

On the plus side, Intel finished 11th for Channel Strategy and Account Management, and placed fifth and seventh in the Durability and Satisfaction Indices, respectively.

■ Juniper Networks

Juniper Networks was a mediocre performer across the board, ranking 33rd overall.

Respondents generally revered the networking outfit’s engineering prowess, but – perhaps unsurprisingly given Cisco’s dominance in the field – few regarded it as a leader or visionary, with one insisting that it is ripe for acquisition.

That said, Juniper didn’t perform too badly in some of the other categories, particularly Margins, Leads and

Incentives, where it sat pretty in 23rd place thanks to its reputation for being moderately generous.

■ Kaspersky Lab

Kaspersky Lab ranked 15th overall, outscoring the majority of its rivals including Trend Micro, Symantec, Sophos and McAfee.

Finishing 19th for Channel Strategy and Account Management and ninth for Margins, Leads and Incentives, the antivirus vendor was generally viewed as a channel-friendly outfit with approachable staff.

When it comes to its tech, respondents portrayed Kaspersky as a slightly wayward genius. Products are sometimes rushed out or don’t quite hit the spot, but when Kaspersky nails it rivals can’t touch it, was the general sentiment.

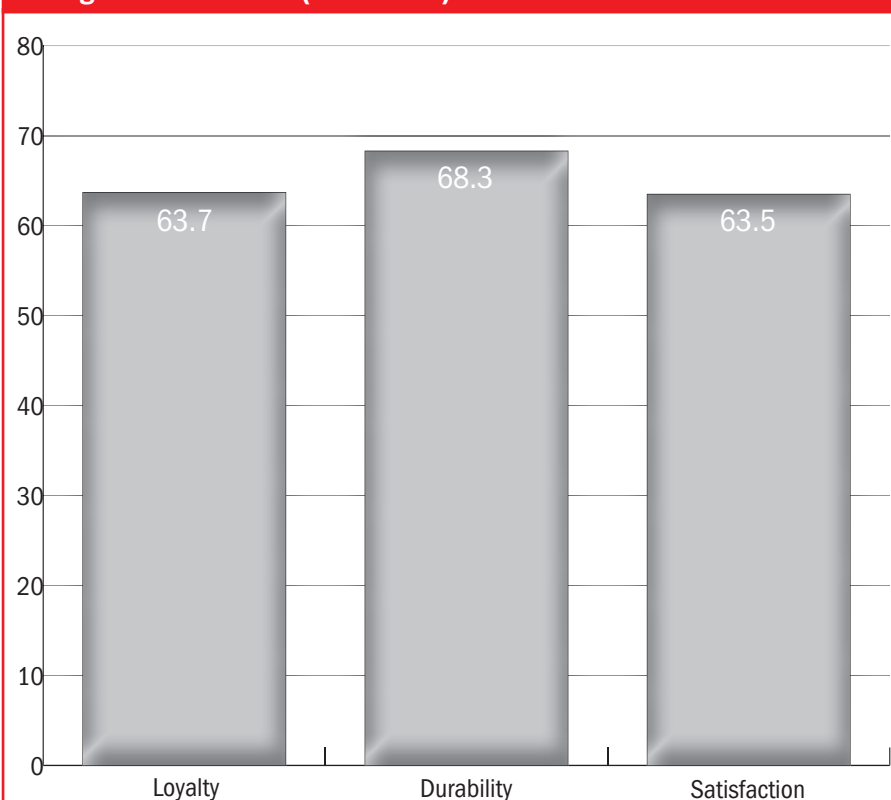
“Where to start with Kaspersky... their technology is incredible... when it works,” said the marketing director of a large IT services firm.

■ Lenovo

Lenovo was a consistently average performer, ranking 24th overall.

The Chinese PC and server vendor’s strongest showing came in Margins, Leads and Incentives, where it sat 14th and received some rapturous feedback.

Average indices scores (out of 100) across all 42 vendors



It finished just 27th for Technology Leadership, where some viewed it more as a follower than a leader and felt it had gone backwards.

"We hear very little regarding their innovations," complained one.

On the plus side, Lenovo ranked in the top half in all three of the additional indices, including 16th in the Loyalty Index.

■ McAfee

McAfee ranked second from bottom overall, ahead of only SAP and behind all its peers including Symantec, Sophos and Trend Micro.

The cybersecurity vendor continues to reshape its portfolio through acquisition, and the addition of recent purchases such as Skyhigh appears to be going down well with partners. But by and large, the respondents in this study felt this industry pioneer has not kept up with the pace of innovation in the cybersecurity market.

It finished no better than 39th on any measure, with respondents slamming its margins as "terrible" and accreditation regime as a "shambles".

■ Microsoft

Microsoft ranked a creditable 12th overall. The software giant was held up as an industry standard bearer in the Technology Leadership and Training and Accreditation categories, ranking sixth in each.

But elsewhere it registered mediocre scores along with some brutally honest written feedback about its channel ethos, account management and margins.

It is perhaps fortunate for Microsoft that the bulk of this research was conducted ahead of the Internal Use Rights debacle in July, an episode that encapsulates the feeling in some quarters that Microsoft sometimes fails to recognise the value its partner community provides.

■ Mimecast

A consistently high performer in the *CRN Vendor Report* down the years, Mimecast shone again this time around, finishing seventh overall.

Respondents talked up its "brilliant" technology, but a few felt it could be more generous or complained that it favours larger, incumbent partners at the expensive of smaller, energetic ones.

The email security specialist aced the three additional Indices, ranking top for Loyalty and second for Satisfaction.

■ NetApp

NetApp's overall ranking of 14th also

ensures it has bragging rights over rivals Nutanix and Dell, which placed 19th and 30th, respectively. It finished in the top half in three of the four core services categories.

The storage vendor earned plaudits for regaining relevance in the hybrid cloud era, and was praised for its useful and accessible training and accreditation schemes.

The CTO of a large IT solutions provider said the vendor has a "very clear focus now after a couple of years in the doldrums".

■ Netgear

Netgear ranked 29th overall, but finished a respectable 13th for Margins, Leads and Incentives, where it beat Cisco.

The written feedback suggests that the SMB networking specialist has a largely contented, if not highly engaged, channel.

Though its technology was viewed as "cheap and cheerful" in some quarters, there is near universal agreement that its offering is a good match for the cost-conscious SMB market. Respondents had very few qualms and – most importantly – felt there is a good opportunity to make some decent money selling its wares.

■ Nutanix

The report's youngest firm finished 19th overall, ranking second for Channel Strategy and Account Management but finishing in the bottom half in the other three core services categories.

With a few notable exceptions, respondents portrayed the hyperconverged infrastructure vendor as a market leader with smooth technology and friendly staff who – in the words of one partner – "always buy lunch".

It also finished a respectable 15th in the Loyalty Index.

■ Palo Alto Networks

Palo Alto Networks was this report's most consistent high performer, finishing in the top three in all four core services categories, and second overall.

Respondents generally felt that the NYSE-listed vendor has used M&A wisely to bolster its core next-generation firewall business.

While a few questioned its technology and channel credentials, most viewed as a trusted market leader with decent associate margins.

"[It is] the leader in the security market and continues to add great tech," said one VAR respondent.

■ Salesforce

Salesforce had a mixed Vendor Report, finishing 27th overall but ranking as high as third for Training and Accreditation, where it garnered near universal praise.

Although some respondents viewed it as distant and even a little arrogant, the CRM giant drew widespread acclaim for its relevant, reasonably priced and accessible training regime.

It also finished in the top 12 in both the Satisfaction and Loyalty Indices.

■ Samsung

Samsung ranked 34th overall but placed a creditable 14th in the Technology Leadership category where it outscored Apple.

Although Samsung placed in the bottom 10 in the other three core services categories, some respondents were fond of the vendor, with one remarking that it is a "shame they don't do laptops any more".

This positive sentiment translated into Samsung's scores on the three additional indices, particularly the Loyalty Index, where it ranked third. Partners would like to see a little more of the South Korean vendor, but the fact remains that it significantly outranked its nemesis Apple in every category.

■ SAP

SAP finished dead last out of the 42 vendors profiled. It ranked 41st or 42nd in each of the four core services categories, and no better than 40th in the three additional indices.

One respondent dubbed it "the big brother that you never wanted" while others slated its complex and outdated technology.

"[It has] good penetration with enterprise customers, but SAP's tech is expensive and not user friendly even now," said the FD of a small IT solutions provider.

■ SolarWinds MSP

SolarWinds MSP ranked 23rd overall, finishing as high as ninth for Channel Strategy and Account Management.

The RMM vendor evidently has a strong following among MSPs, with one respondent branding it an "outstanding company to deal with".

But while some couldn't rate it more highly, its dealings with others left a bitter taste. A minority had almost nothing good to say and grumbled about uncommunicative staff, roadmap delays and support woes.

Rivals ConnectWise and Datto also both outscored it.

■ SonicWall

SonicWall emerged as a solid all-round performer, ranking 11th overall and placing in the top 15 in all four core service categories. It also finished in the top five in the Loyalty Index.

Although one or two respondents viewed the firewall vendor as a follower rather than leader and found its staff unresponsive, most saw it as a strong brand with reliable tech, fair margins and a sound channel ethos. Some were genuinely excited as to what lies around the corner for SonicWall now it is free of Dell's shackles.

It "seems to be fighting back," the CTO of a small reseller remarked.

■ Sophos

Sophos emerged as the Marmite of this report, ranking 37th overall.

The cybersecurity powerhouse failed to finish higher than 28th in any of the seven categories or indices, and ranked a dismal 38th for Technology Leadership.

Its weak marks don't tell the whole story, with the written feedback clearly indicating that Sophos has pockets of loyal followers in the channel. But while some characterised it as an also-ran that fails to invest in its partners, others hailed its market-leading technology and channel-friendly philosophy.

■ Symantec

Impending new owner Broadcom has a fair amount of work to do to restore confidence in Symantec's enterprise channel, judging by its performance in this report.

The soon-to-be-cleaved vendor ranked 36th overall on the back of some polarised scores and savage written feedback.

It did, however, finish 26th in Margins, Leads and Incentives, where it was viewed largely as a fair and

reasonable – if not overly generous – ally.

■ Trend Micro

Ranking 31st overall, Trend Micro sat slap bang in the middle of its peer group, beating Symantec, Sophos and McAfee but finishing below ESET and Kaspersky.

Despite some concern that it is not the force it once was, the Japanese cybersecurity outfit finished in the top half for Technology Leadership, where many viewed it as best in class.

Feedback was mixed in the other core categories, where some respondents grumbled about the level of service they are receiving and others praised its helpful staff, decent margins and generous MDF.

■ Veeam

Veeam ranked 25th overall, failing to finish in the top half in any of the four core services categories or three additional indices.

Despite receiving consistent praise for its technology vision, the data management outfit was marked down for its perceived lack of channel personnel and mean-spirited approach to margins and leads.

"Account management is light touch unless deals are in the mid six figures-plus," one said.

■ VMware

VMware was a consistently strong performer, ranking 10th overall.

It finished 10th for Technology Leadership, where respondents variously billed it as the "gold standard for virtualisation" "a complete innovator", and the "leader in its field".

It also sat pretty in 10th for Training and Accreditation, but garnered lower scores in the other two core services categories. Some respondents were

less than impressed by the margins and leads VMware dishes out, with one billing it as "dreadful" and another "a shower of greedy thieves".

■ WatchGuard

Star performer WatchGuard ranked fourth overall.

With a couple of notable exceptions, respondents had nothing but good things to say about the SMB network security specialist. Partners variously praised its inexpensive technology, helpful and well-informed staff and generous margins and incentives.

Although one or two felt the Seattle-based vendor could throw more leads its way, WatchGuard was a consistently high performer, ranking 17th in Technology Leadership, seventh in Channel Strategy and Account Management, third for Margins, Leads and Incentives, and fourth for Training and Accreditation.

■ Webroot

Webroot finished 28th overall, ranking as high as sixth in Margins, Leads and Incentives but garnering tepid scores elsewhere.

The end-point security and network protection vendor was widely lauded in the comments sections, with its Luminaries programme singled out for particular praise.

This research was conducted in the wake of Webroot's acquisition by cloud backup vendor Carbonite, and one MSP boss expressed concerns that the vendor's channel focus has wavered under its new owner.

"Contact has dropped off, but the excellent Webroot Luminaries programme makes the product really alive and kicking. It's the only channel/user programme most of our company employees have contact with daily," they said.

For more information on the full 120-page 2019 CRN Vendor Report, please contact matthew.dalton@incisivemedia.com