Sales channel management strategy

Tools to help advanced manufacturing organizations stay customer-focused and relevant

Building a better working world

Introduction

Within business-to-business (B2B) sales, customers' expectations for sales interactions are rapidly changing, and the channels through which companies serve their customers must evolve. Companies are under increased pressure to minimize selling, general and administrative costs, while remaining customer-focused and driving future growth. No longer is it sufficient to rely on the traditional and costly face-to-face sales representative channel model to serve customers; B2B companies must establish additional sales channels to stay relevant.

Advanced manufacturing (AM) companies, in particular, are lagging behind peers in other industries — such as B2B retail — in establishing new, effective sales channels. With technological advancements beginning to happen within the AM production line (such as 3D printing and artificial intelligence), AM companies must place the same increased focus on advancing channels to serve customers.

With competing business priorities and countless sales channel options available, how does a B2B company not only determine the most effective channels to establish, but also how to optimally align each customer to its ideal channel? This white paper seeks to preview proven methodologies that Ernst & Young LLP (EY US) has used to contribute value to its clients.

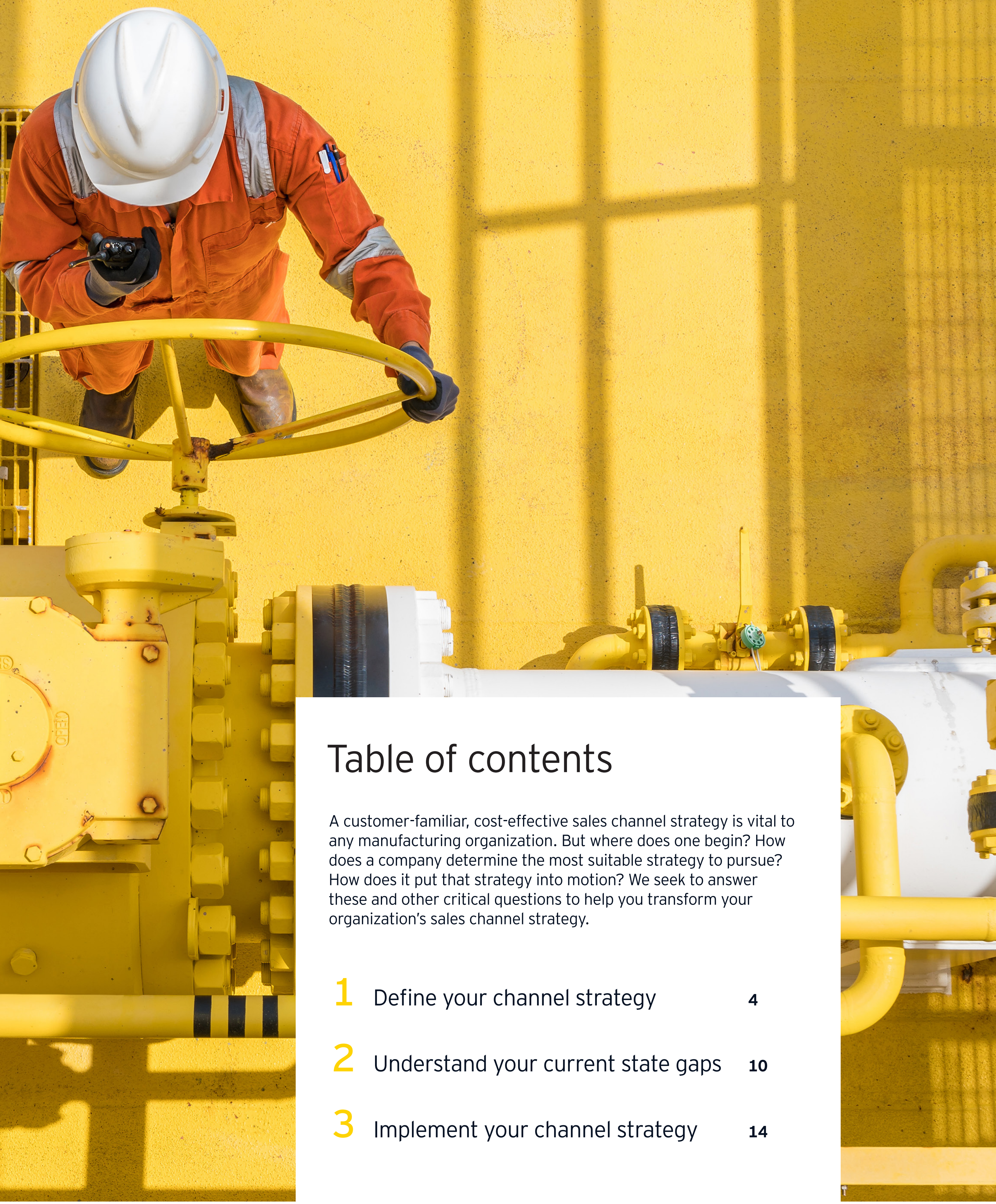


Table of contents

A customer-familiar, cost-effective sales channel strategy is vital to any manufacturing organization. But where does one begin? How does a company determine the most suitable strategy to pursue? How does it put that strategy into motion? We seek to answer these and other critical questions to help you transform your organization's sales channel strategy.

Current trends in channel management and leading AM examples

1. Increased customer focus

AM companies are increasingly seeing the value in becoming customer-familiar. While customer segmentation is not a new concept, companies are employing more rigorous, data-driven segmentation efforts to better understand customers and determine how best to serve their needs. The need to consciously utilize customer segmentation has never been greater.

Leading example: global chemical company

We helped a $6b global chemical manufacturer conduct a robust segmentation effort in 2019. By analyzing insights from an extensive customer preference survey, EY US helped the company establish three standard global customer segments, define customer treatment policies and select ideal sales channels to serve each segment.

2. E-commerce to complement sales teams

According to Forrester, US B2B e-commerce sales are expected to reach $1.8t by 2023. AM companies are rapidly joining the trend, primarily by building in-house e-commerce offerings or partnering with third-party marketplaces. Given the complex nature of B2B manufacturing transactions, companies are especially keen on providing e-commerce offerings that streamline the overall purchasing experience for buyers.

Leading example: global commercial aerospace and engineering conglomerate

The conglomerate's aerospace division launched its own platform in December 2018 as an online marketplace for third-party aviation parts suppliers. The platform's value proposition lies in its user-friendly experience — sellers can set up a custom storefront within minutes; in turn, they must provide transparent pricing and product information so buyers can make informed decisions.

3. Enable social selling

Establishing inside sales teams has enabled AM companies to leverage social media platforms like LinkedIn to generate sales leads and serve marketing content. When used effectively, social selling is less intrusive than traditional cold-calling and can be a powerful way to form meaningful relationships with B2B buyers.

Leading example: multinational chemical company

A large multinational chemical company successfully leverages LinkedIn by sharing content focused on its own people. This allows the company to engage readers through thought leadership while also building trust by tying a human face to its brand.

4. Robust channel partner programs

Like end-customers, channel partners (e.g., distributors) must be properly motivated and incentivized to do business with manufacturers. As such, AM companies are developing robust programs to better align partners to their strategic goals, manage partner performance and equip partners with the tools needed to successfully sell their products in the market.

Leading example: cloud computing company

EY US was engaged by a $2b US cloud computing company to deliver an end-to-end transformation of its partner program, from partner selection to performance measurement and management. Key program features include digital partner portals, performance-based incentives, product training and marketing support.

1

Define your channel strategy

AM organizations, more than organizations in other industries, rely on a multichannel strategy to reach and serve their customers. Today's AM organizations deploy a number of channels, including field sales, inside sales, e-commerce marketplaces, distributors, retailers, dealers and others, to get solutions to end users. But how does a company optimally determine its future state channel strategy to support both top-line growth and bottom-line savings?

- First, understand customers' needs and preferences, and what they most value by conducting a voice-of-customer (VOC) analysis to cluster customers with similar values into groups
- Second, combine your organization's business priorities with the customer value groups by utilizing a methodology that considers the product value, cost to serve and financial value of each customer
- Finally, determine what channels to leverage by utilizing a "3C" framework of cost, control and customer insights, compared against a multitude of strategic considerations

What do my customers value most and how do they prefer to buy?

Before choosing channels to leverage and aligning customers to each channel, it's important to gain a holistic understanding of what your customers value, including channel preferences. The concept of being customer-centric is likely not new, but successfully following through can be challenging. How do you accurately understand customer channel value preferences? While many methods exist, defining a customer value matrix and launching a customer analysis to collect VOC data is a leading practice method to identify customer values. For some AM companies that utilize third-party partners to sell products directly to end customers, it may be necessary to engage the help of these partners to reach end customers.

Define customer channel value matrix

As the name implies, a customer value matrix is a set of questions and criteria to which customers respond; aggregated results provide insights on what aspects are most important to customers.

Consider the following example of a customer value matrix asking customers to rate the degree to which they value various aspects of the channel experience:

Analyze customer value matrix results and begin to group customers

If customer segmentation exists at your company, the VOC insights for value preferences will augment the existing segmentation. If segmentation has yet to be completed, the VOC value preferences are a great way to initially define the segments. After your company receives results of the customer value matrix, it's important to group customers based on similar values.

Sample customer channel value matrix

1. Digital capabilities available across the entire order placement process
2. A differentiated buying experience
3. Online digital interactive support (e.g., chat)
4. Single point of contact to jointly develop strategic plan
5. Access to online engineer discussion forums/community
6. Easy, effective and enjoyable product ordering
7. Field sales understanding of my business, industry and industry trends
8. Ease of doing business with field sales of supplier or supplier's channel partners

Sample customer value groupings

High touch, strategic input

Customers desire a single point of contact and a trusted professional to help with their purchase decisions and answer their questions.

Medium touch, flexibility

Customers don't necessarily need a dedicated sales rep, though they do want the option when needed. They are moderately self-sufficient.

Low touch, transactional

Customers want to be self-sufficient and make purchases on their own (e.g., through self-service digital channels).

How do I align my customers' channel preferences to my own business priorities?

Once you've identified groups of customers with similar values and preferences, then consider what the customer prefers may not always be aligned with what makes sense for your business. Ultimately, you should aim to strike a balance between serving your customers' preferences and addressing your business priorities.

So how do companies strike this balance? Consider the following two-step process:

Step 1: Determine the strategic priority of each customer to your business

One way to determine the strategic priority of your customers is to assess them based on three key factors — the products they buy, the financial value they deliver and the cost to serve them. Some potential criteria you may consider for each factor include the following:

Exhibit A: Strategic point criteria

	Product	Value	Cost
What to consider	Is the customer buying the products I'm most keen on selling?	What is the financial benefit for my business to serve this customer?	What is the total cost to my business to serve the customer?
Potential criteria	‣ Sales of high-margin products ‣ Sales of strategic product offerings (e.g., new, advanced, environmentally friendly)	‣ Sales revenue ‣ Sales margin ‣ Sales quantity ‣ Sales compound annual growth rate ‣ Compound annual growth rate (CAGR)	‣ Percentage of sales representative or customer service representative's time spent on serving the customer ‣ Total freight costs

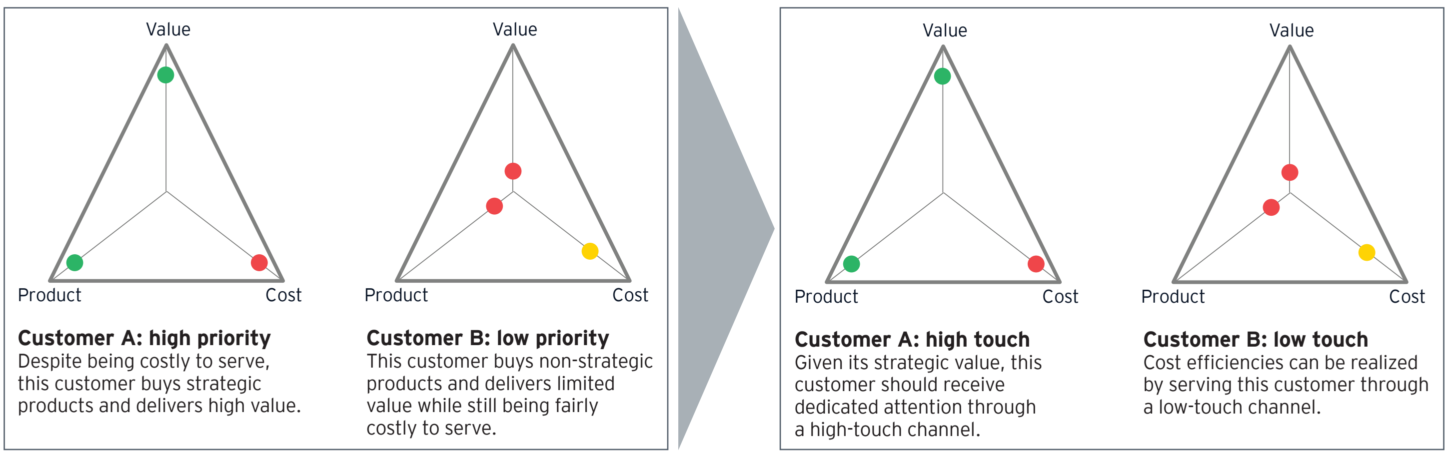
Based on each customer's relative performance across these three drivers (high, medium or low), you will begin to glean insights into their level of priority to your business. For example, high-performing customers may be considered high priority, and vice versa. The exhibits on the following page provides a helpful way to visualize this prioritization process.

Step 2: Determine each customer's degree of interaction

By aligning the strategic priority of each customer with their buying value preferences, your organization can optimally select the appropriate level of touch they should receive.

Exhibit B: Strategic Priority

Exhibit C: Degree of Interaction



What channels do I choose to play in?

Channel evaluation framework

Leveraging a consistent framework to evaluate each channel will inform your organization's future state channel strategy based on the corresponding degree of interaction for each customer account. Consider the cost, control and customer insights framework introduced in the overview section of this miniseries to choose the best channel(s) that align to your customers' buying values and your internal business priorities.

Exhibit D: Example channel evaluation framework

Channel	Cost	Control	Customer insights
Face-to-face salesforce	★★★	★★★	★★★
Inside salesforce	★★☆	★★★	★★☆
Manufacturers' sales reps	★★☆	★☆☆	★☆☆
Distributors and wholesalers	★☆☆	★☆☆	★☆☆
Company-owned e-commerce platform	★☆☆	★★★	★★★
E-commerce marketplaces	★☆☆	★★☆	★★☆
Dealers	★☆☆	★☆☆	★☆☆
Value-added resellers	★☆☆	★★☆	★☆☆

When evaluating the trade-offs of each channel, consider the types of products or services your company sells through the channel. For example, the extent of customization will play a role in channel determinations. For products that are more customized, choose a channel that involves higher direct contact, such as face-to-face sales or dealers, to describe and answer questions on the specific customization aspects for the customer to consider. Alternatively, a product that is relatively standardized is better suited for other lower-touch channels.

Channel purpose

Another aspect to consider for your channel strategy is the primary strategic purpose each channel serves. Common aspects to consider regarding the channel purpose include the following:

- **Coverage vs. focus:** Is your goal to reach the highest number of people (coverage) or to target a specific type of customer (focus)?
- **Customer buying journey:** Where does the channel fall in your customer's buying journey (e.g., research, evaluate, order, service), and what purpose does it fulfill for the customer?
- **Partner capabilities:** Do certain capabilities make sense (either strategically or financially) to purposely be outsourced to a channel partner to fulfill? For example, value-added resellers are an important channel for some AM companies, and these channel partners provide services, in addition to sales, such as product reformulation/configuration, installation, integration and solution design.
- **Initial vs. ongoing:** Is there an alternative channel needed to fulfill the purpose of servicing ongoing maintenance after initial purchase?
- **Future purchases:** Does the channel build relationships with customers to drive preference to your brand and set up repeat purchases?

Channel conflict

Finally, considering potential channel conflicts is another key aspect of establishing a channel strategy. Channel conflict occurs when one channel competes against another channel. For example, if you have face-to-face sales representatives as a channel and distributors as another channel, and both target the same customer, a conflict occurs. Establishing a channel strategy that has clear target accounts (such as size or specific markets) assigned to each channel is helpful to avoid conflict. However, conflict inherently happens, and having a defined path to resolution is necessary.

2

Understand your current state gaps

Now that your organization's channel strategy is defined, how do you identify and bridge the gaps between your existing channels and the newly defined strategy? What key considerations must your organization address when establishing new channels?

To answer these questions, we focus on the channel partners with which an organization works. By applying specific methods and considerations to evaluate the partners of a channel strategy, advanced manufacturing organizations are better equipped to understand current gaps to their channel strategies.

How can I evaluate the performance and value of partners?

Most AM organizations work with channel partners, commonly in the form of distributors and wholesalers, manufacturing representative agents, value-added resellers, dealerships and even other original equipment manufacturers. For larger, mature AM companies, channel partnerships are typically built on legacy relationships formed over several years of doing business. Whether an organization is seeking to optimize its existing channel partner base or exploring new partnerships, the following questions are important to consider:

- Will this partner fulfill a short-term need, or can it drive longer-term strategic value?
- Will this partner provide services or capabilities that the organization cannot (or chooses not to) offer currently or in the future?
- Will this partner provide strategic market insights and customer data to help the organization grow, or will the partnership be primarily transactional?
- Are the business goals and culture of this partner aligned with the organization?
- Is this the best partner to help fulfill the organization’s future state channel strategy?

To address these questions and thoroughly evaluate current and prospective channel partners, it is leading practice to conduct a **partner capability assessment**. The assessment measures each partner against a common set of criteria, evaluating each partner’s performance and value delivered to the organization relative to one another.

Exhibit E: List of common capabilities used to assess channel partners

Capability	Description
Customer relationship management	Provides rich insight into customer needs and preferences; clear understanding of customer’s product and application needs
Local/regional market insight	Has strong local presence with proven relationships; well-established with the ability to provide a one-stop-shop experience for customers
Technical service and support	Has the ability to provide robust technical product and manufacturing support to a customer, including technical and safety training, troubleshooting and ongoing support
Value-added services	Performs essential value-added services, including product configuration, installation, integration and solution design

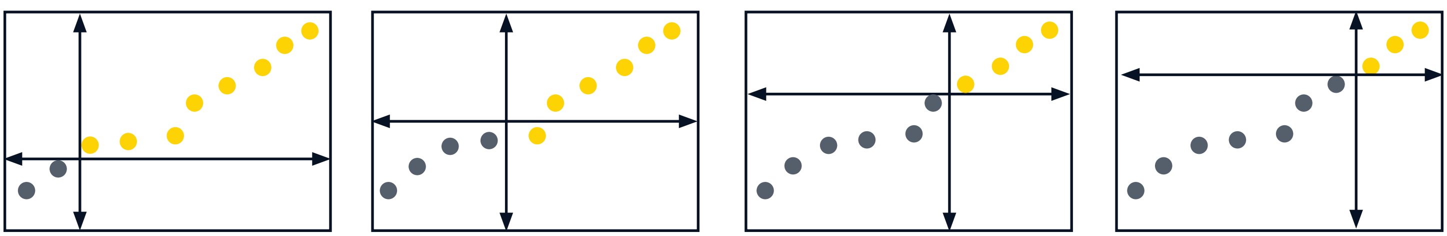
While strong performance across all capabilities is desirable, it is not critical; there is value in working with channel partners that excel in specific capability areas. For example, an organization may choose to have one partner that handles selling activities, while a different partner manages back-end order fulfillment. Ultimately, each partner’s capabilities must be closely aligned with the organization’s broader channel strategy.

How can I validate that my partners are adding value?

As an organization uncovers performance gaps in its current channel partner base, the need to eliminate low-performing partners arises. This can be achieved through **channel partner rationalization**, an effort that identifies and eliminates low performers to reduce, or "rationalize," the partner base. Conducting a channel partner rationalization effort on an annual basis helps an organization validate it is working with high-value partners, and streamlines its operations by reducing shipping, order processing and other administrative costs incurred by managing too many channel partners.

Leading practice recommends leveraging an agile, sprint-based approach to channel partner rationalization. Using the capability assessment metrics mentioned earlier as the foundation, determine a set of both qualitative and quantitative criteria to analyze partner performance. In each successive sprint, apply these criteria with increasing rigor to identify candidates for elimination; any partners who fail to meet the more stringent criteria in each sprint are considered for elimination. Exhibit F provides a visual demonstration of how this rationalization analysis may be conducted.

Exhibit F: Sample sprint-based channel partner rationalization methodology



Sprint 1

Identify "low-hanging fruit" candidates for immediate elimination based on:

- Minimal sales volume
- Previous considerations to cease partnership

Sprint 2

Utilize quantitative scoring model to assess partners across key financial and operational metrics:

- Sales revenue
- Sales margin
- Sales CAGR
- Sales volume

Sprint 3

Supplement quantitative analysis with key qualitative capability criteria, e.g.:

- Customer relationship management
- Regional market insights
- Stock keeping

Sprint 4

Finalize partners by assessing alignment to organization's strategic goals, e.g.:

- Value-added services
- Technological innovation
- Ease of doing business
- Relationship strength

As this example shows, each successive sprint introduces new criteria that become increasingly difficult to meet. By the final sprint, an organization will uncover a consolidated list of its highest value-driving partners, who are best-equipped to continue serving its channel strategy.

It is important to note that this exercise can be fully customized for any organization's specific needs. For example, one may start by setting a target final number of partners to avoid rationalizing too many or too few. Additionally, there may be situations where a partner must be retained for strategic reasons, despite failing to meet certain sprint criteria. These individual cases should be carefully considered to determine if overriding the analysis is appropriate. Ultimately, organizations should tailor the rationalization approach to ensure it serves their best interests.

Consider the following key characteristics when embarking on a channel partner rationalization effort:

1. **Contract and inventory:** Contractual implications of ending a relationship with a channel partner must be thoroughly evaluated to avoid any undesired consequences. Some contract terms may require an organization to buy back unsold inventory when terminating the partner; in these cases, the financial impact should be carefully assessed.
2. **Replacement plan:** Prior to rationalizing any partners, organizations must have a well-defined plan to replace the business and minimize risk, such as moving the business to a non-rationalized partner or taking it direct via a different sales channel.
3. **Customer impact:** Consider the impact on the end-customer experience when customers are assigned to a new channel partner or sales channel; minimizing disruption is key to maintaining the business. Changing lead times, payment terms and order frequency are a few aspects to keep in mind.

3

Implement your channel strategy

To implement your organization’s transformed sales channel strategy, we consider key focus areas of partners and technology and data to answer the following critical questions:

- Which steps must an organization take to activate new sales channels?
- Once its channels are established, how does an organization manage on an ongoing basis?

This chapter will introduce proven methodologies that Ernst & Young LLP has utilized to help numerous AM clients achieve their channel strategy goals.

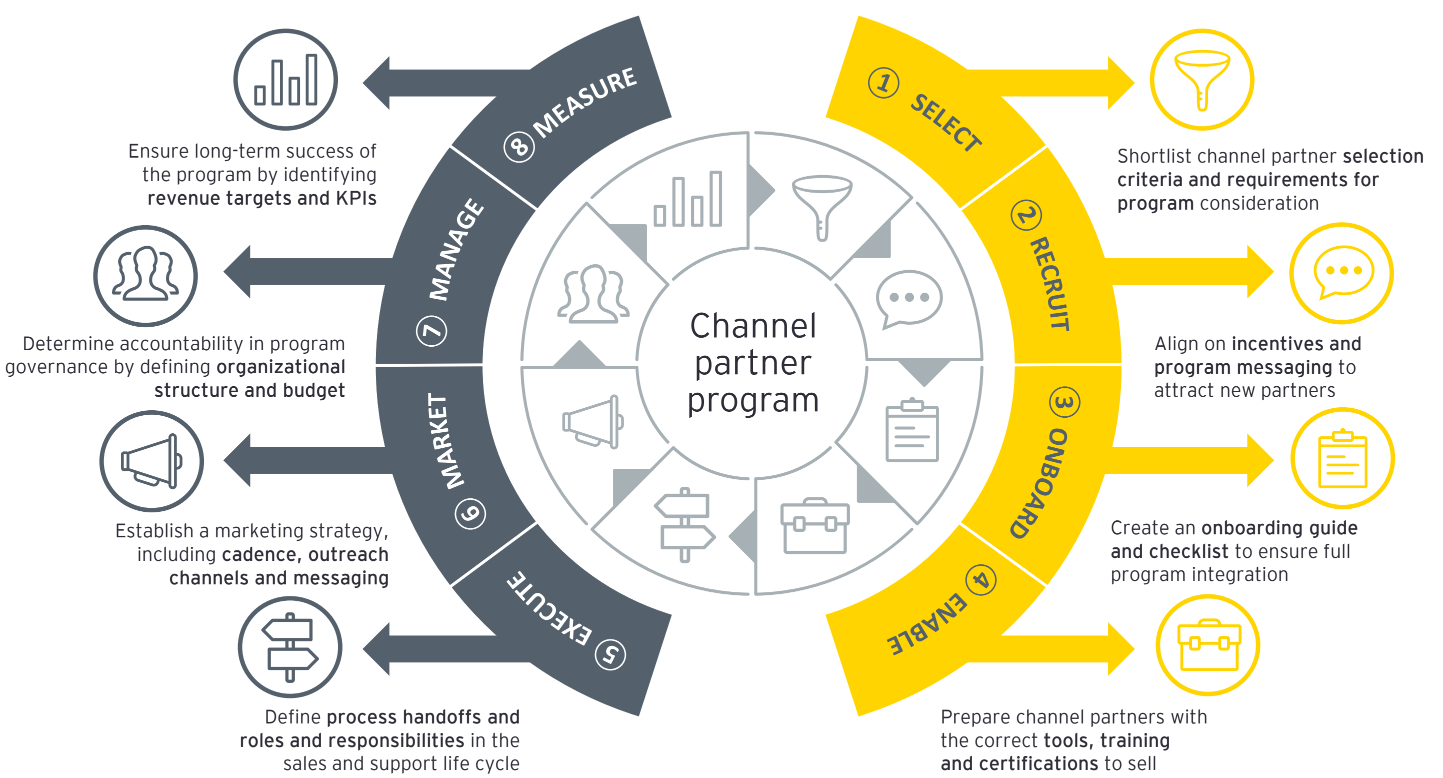
How can I define processes for the partner relationship life cycle?

Activate new partner channels

As Chapter 2 discussed, using sales channel partners is a common practice for AM organizations, as many companies have decades of experience working with long-standing partners. Whether an organization is establishing a channel partner business for the first time or seeking to accelerate its existing partner network, it is important to develop a **systematic, end-to-end partner program**. This program should define clear and standardized processes for managing the entire partner relationship life cycle, from selecting and onboarding the channel partner to effectively managing and measuring partner performance.

Exhibit G shows the eight stages a channel partner program should encompass: Select, Recruit, Onboard, Enable, Execute, Market, Manage and Measure.

Exhibit G: Eight-stage channel partner program



When a partner program is launched, it is typical to begin the "Select" stage by conducting a formal **request for proposal (RFP)** process to identify new partner candidates. An organization may consider using the partner capability assessment discussed in Chapter 2 to define the key criteria prospective channel partners must satisfy to fulfill its strategic sales goals. Organizations may also ask that candidates address specific criteria in their response to the RFP.

How can I measure partner performance?

Manage partner channels

Stage 8 in the channel partner program — ongoing management and measurement — is key to gain visibility into partner performance and alignment to the organization's channel strategy objectives. Using a channel partner performance scorecard is a leading practice to regularly measure performance, provide incentives for the right partner behaviors and identify potential issues. Consider the following elements to develop a channel partner performance scorecard:

- **Choosing metrics:** develop metrics that support and drive the organization's strategic priorities
- **Number of metrics:** limit the scorecard to five to seven key metrics to minimize administrative burden
- **Measurability:** develop quantitative metrics with clearly defined performance tier thresholds for each metric
- **Cadence:** track scorecard performance on a quarterly basis; for key strategic partners, consider more frequent, monthly tracking
- **Standardization:** implement the scorecard as a global standard, with minor regional nuances only if required

Exhibit H: Sample channel partner performance scorecard

Metric category	Metric	Definition	Measurement unit
Financial performance	Revenue dollars ($)	Partner generates sales revenue growth (measured by applicable fiscal quarter, year-over-year (YoY)).	Growth YoY
	Payment behavior/ credit management	Partner makes payments on time and aligns to standard payment terms.	On-time payment
Growth initiatives	Business development	Partner has strong business development pipeline of new projects that generates growth.	Qualitative ranking of quality and growth potential of business development pipeline
Supply chain capabilities	Stock keeping	Partner carries sufficient inventory to avoid stockouts.	Order lead time
	Demand forecast accuracy	Partner provides accurate monthly demand forecast.	Percentage of forecast accuracy with one- or two-month lag

After implementing a standard performance scorecard, results may be aggregated and analyzed centrally to support ongoing performance tracking and comparison across all channel partners. Additionally, individual scorecard results can be shared externally with the respective channel partner to facilitate open communication and discussion of improvement areas. Persistent performance issues may warrant discussions with the partner to renegotiate contract terms, or potentially result in contract nonrenewal. Alternatively, performance incentives, such as rebates or discounts, can be offered to reward desirable partner behavior.

Should I build, buy or partner for an e-commerce platform?

Activate new channel technologies and data

As today's customer highly values a digital buying experience, having an e-commerce sales presence is a top channel strategy priority for many AM organizations. An e-commerce sales channel can also provide AM organizations an opportunity to complement other channels (e.g., face-to-face sales) and gain new customers by expanding their reach. Additionally, e-commerce provides AM organizations the opportunity to present their industry knowledge to prospective buyers and clearly convey the product's value proposition.

However, implementing a new e-commerce platform is a complicated decision-making process. Organizations must first decide on the technology platform to support this initiative by considering the issue of build, buy or partner:

- **Build:** build a custom digital platform, either from the ground up or through a licensed technology solution
- **Buy:** acquire an existing third-party platform
- **Partner:** establish a storefront on an existing third-party platform

It is important to carefully assess the benefits and drawbacks of each option. For example, while a technology build provides significant control and the ability to gather deep customer insights, it also requires significant investment to launch and drive customer awareness and adoption. Conversely, setting up a storefront on a well-known third-party marketplace is a quick and inexpensive way to get to market, though digital shelf space must often be shared with direct competitors. Ultimately, thoughtfully weighing each factor will allow AM organizations to select the path that best aligns with their objectives and customer expectations. Exhibit I evaluates key pros and cons of building, buying or partnering for an e-commerce platform.

Exhibit I: Pros and cons of build/buy/partner for e-commerce platforms

Decision	Setup cost	Setup effort	Operational cost	Operational effort	Control	Customer insights	Initial awareness
Build	★★★	★★★	★★★	★★★	★★★	★★★	★☆☆
Buy	★★★	★★☆	★★★	★★★	★★★	★★★	★★☆
Partner	★☆☆	★☆☆	★☆☆	★☆☆	★☆☆	★★☆	★★★

Setup cost/effort: cost and level of effort to establish the platform
Operational cost/effort: cost and level of effort to operate and manage the platform
Control: degree to which the business has control over the platform
Customer insights: degree to which the platform offers insights into the end-buying customers
Initial awareness: degree to which customers are already aware of the platform at the time of setup

Once this decision is made, the next step is to evaluate candidates, either technology vendors to support a custom build or third-party platform targets to acquire or partner with. This can be achieved by conducting an **in-depth fit assessment** to identify the most suitable candidate. Build, buy and partner targets may all be evaluated using a similar set of criteria. Top areas to assess include how well each option delivers the necessary functionalities to support the desired digital customer experience, as well as the level of effort required to integrate with existing systems, processes and ways of working. Consider the following framework:

Exhibit J: Sample fit assessment framework to evaluate e-commerce platform build/buy/partner candidates

Fit criteria	Candidate A	Candidate B	Candidate C
User experience/ease of use *Is the platform user-friendly? Does it allow customers to easily perform all buying activities?*	◕	◕	●
Back-end functionality *Can my personnel interface with customers and perform other back-end activities? (e.g., reporting)?*	◕	◑	◔
Ease of implementation *Can the platform be easily deployed and integrated with my existing sales processes and systems?*	◔	◑	◑
Change management *Can my personnel be easily trained to support and manage the platform?*	◔	◕	◑
Strategic fit *How will the platform disrupt my business? Does it align with my channel strategy goals?*	◕	◑	◑
Cybersecurity *Does the platform offer robust cybersecurity? Does it have a proven record?*	◔	◔	◕
Personalization *Does the platform allow for personalization to my brand and product?*	●	◕	◑
Capability to embed external content *Can I embed content from my organization or distributor's sites?*	◑	◕	◕

Conclusion

Advanced manufacturing companies are at a pivotal point to transform their sales channel strategies. By optimizing channels with varying degrees of interaction to meet internal company and external customer needs, your company can be well-positioned to sustain growth. Understanding the potential gap areas in the partner component of an organization's channel strategy is an essential step in making the strategy a reality. Partners can be optimized by conducting a channel partner capability assessment and rationalization effort. With a comprehensive understanding, your organization will be better prepared to implement its future state channel strategy.

Three critical steps to achieving success:

1	Define your channel strategy	Uncover your customers' values and align them with your business priorities to select the ideal channel mix for your future state strategy
2	Understand your current state gaps	Consider the partner component of your strategy to identify key issues that must be addressed as you establish new channels
3	Implement your channel strategy	Apply methods to activate new channels and manage them effectively

To learn more, reach out to one of our thought leaders today to see how we can help your organization advance its sales channel strategy.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