INSIGHT MARKETING TECH

Sales Channel Strategy Toolkit

Decide which routes to market deserve investment, model their economics side by side, set rules that prevent channel conflict, and launch a new channel with a plan you can measure.

STRATEGY GUIDE + SPREADSHEET TOOLKIT

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1. The channel options

Channel	Best when	Watch out for
Field / direct sales	High deal values, complex buying groups, long cycles	High cost per rep; ramp time; dependence on individuals
Inside sales	Mid-size deals, buyers comfortable buying remotely	Lead volume must keep reps busy; quality of handoff from marketing
Self-serve e-commerce	Low to mid price, simple products, clear value	Needs strong site conversion and support content; price transparency
Partners / resellers	Partners already own the customer relationship or a needed service	Margin cost, less control over message and experience, enablement effort
Marketplaces	Customers already search there; you can compete on the platform terms	Fees, platform rules, limited customer data, price comparison
Affiliates and referrals	A clear, trackable offer and a strong conversion page	Attribution disputes, brand safety, fraud controls

2. Channel-customer fit

Map each customer segment against the channels they actually prefer to buy through. Mark: **P** = preferred, **A** = acceptable, **X** = does not fit.

Segment	Direct	Inside	Self-serve	Partner	Marketplace	Affiliate

Where a segment has a single P, that channel is strategic for that segment. Where a segment has no P, you may be selling to it the wrong way.

3. Channel economics

Compare channels on contribution per customer after channel costs, not on revenue. The **Channel Economics** tab in the spreadsheet calculates these from your inputs.

Input per channel	Meaning
Average order or contract value	Revenue per new customer in year one
Gross margin %	Before channel costs
Channel cost %	Partner margin, marketplace fees, affiliate commission, payment fees
Acquisition cost per customer	Marketing and sales cost to win one customer through this channel
Retention / renewal rate	Share of customers who buy again or renew
Cost to serve per customer	Support, onboarding and account management

Year-one contribution = value x (margin % - channel cost %) - acquisition cost - cost to serve. **Payback** = acquisition cost / monthly contribution. The spreadsheet adds a three-year view using the retention rate.

4. Rules of engagement (channel conflict)

Conflict appears when two channels chase the same customer. Write the rules down before launching a second channel.

- [ ] Account ownership: which channel owns which segments, regions or deal sizes
- [ ] Deal registration: how a partner registers a deal and how long protection lasts
- [ ] Pricing: whether direct and partner prices are aligned, and how discounts are approved
- [ ] Online price policy for resellers and marketplaces
- [ ] Compensation: whether direct reps are paid on partner-sourced deals (neutral compensation reduces conflict)
- [ ] Lead routing: how inbound leads from partner territories are passed on
- [ ] Escalation: who decides disputes and within what time

Rule	Our decision	Owner	Review date

5. Partner program design

Element	Decide	Notes

Partner types	Referral, reseller, service/implementation, technology	Each has different economics and needs
Tiers	Entry, and one or two higher tiers	Tie tiers to measurable criteria (revenue, certified staff, customer satisfaction)
Economics	Referral fee or reseller margin by tier	Model it in the spreadsheet; margin must leave you a positive contribution
Enablement	Training, sales kit, demo access, co-marketing	Budget time for it; unsupported partners rarely sell
Requirements	Minimum activity, customer experience standards	Written in the partner agreement
Reporting	Registered deals, pipeline, won revenue per partner	Reviewed quarterly

6. Launching a new channel

Phase	Weeks	Actions	Evidence to proceed
Hypothesis	1-2	Write who it is for, why this channel, expected economics	Economics positive in the model at realistic assumptions
Pilot	3-10	Limited launch: one region, segment or 2-3 partners; capped budget	Conversion and cost in range of the model
Scale decision	11-12	Compare pilot vs. model; decide scale, adjust or stop	Written decision with numbers
Scale	13+	Expand gradually, add enablement and reporting	Contribution holds as volume grows

Channel scorecard (quarterly)

Channel	Revenue	New customers	Contribution	Payback (months)	Conflict issues	Decision

> The spreadsheet includes the Channel Economics model, the Fit Matrix and the Quarterly Scorecard as editable tabs.

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