

Onboarding a New Distributor and/or Manufacturers' Rep

- Establishing the Foundation for Success



Plethora of P's that will lead to Prosperity



- Plan



- People



- Policy & Procedures



- Products



- Pitfalls



- Parting Thoughts



Plan – From Pre-Launch to Press Release

- Before you launch, lots of things to do in preparation.
- First, assign a Launch Leader for both parties
- Pre-Authorization Prep
 - Both parties agree on: NDAs, T&Cs, Distribution Policy, Credit Limits, Account setup, Contracts are Signed, etc.
- Notifications
 - Communicate the partnership with all involved within both parties.
 - Sell the advantages of the relationship.
 - Notify your current partners (Disti Channel, Suppliers, Reps, etc.)
 - Don't tell customers yet.
 - Don't make posts to Social Media yet.



Plan – From Pre-Launch to Press Release

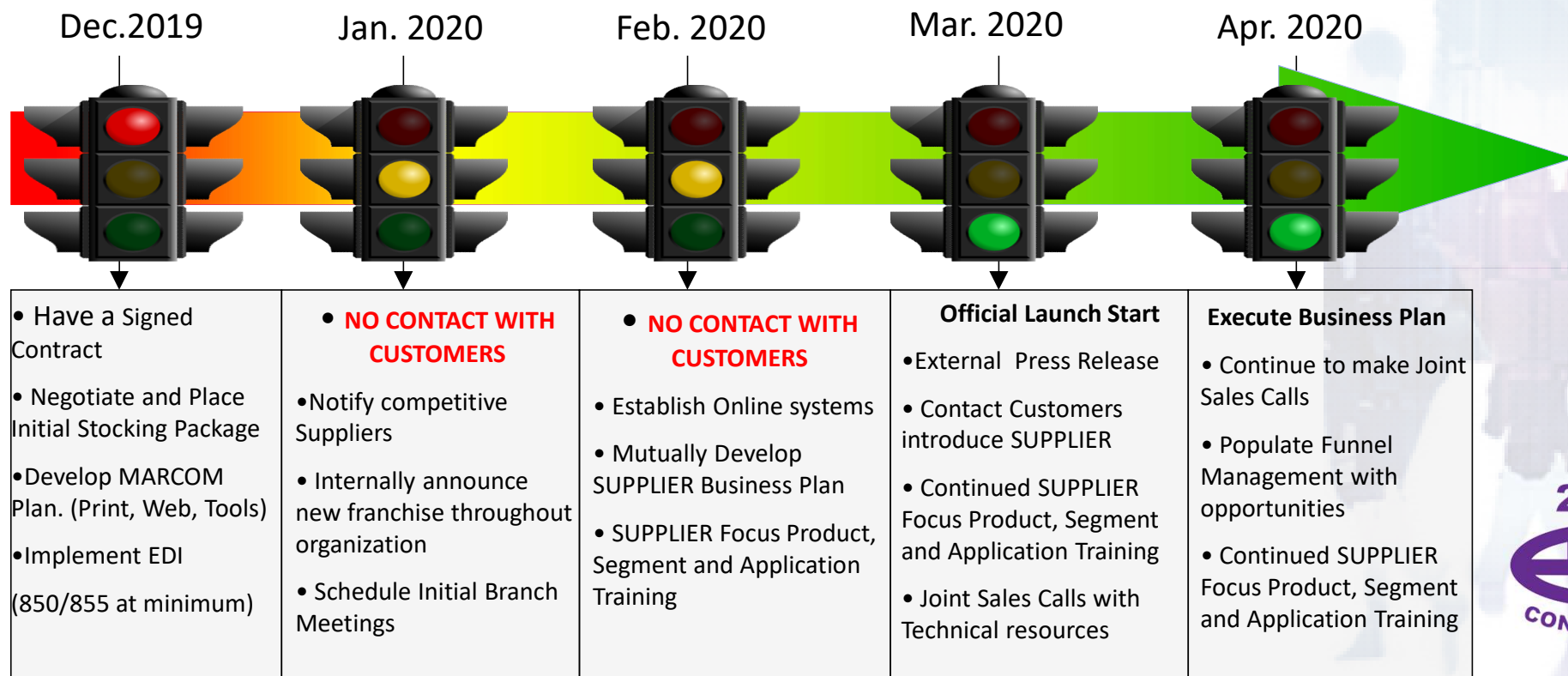
- Define Initial Targets and Goals
 - Determine areas to focus as you begin the relationship.
 - Build your plan and be specific on: the focus products, markets, branches
 - Build marketing materials - highlight company strengths and focus products
 - Establish reward programs to incentive the sales team
 - Develop initial list of target customers
- Bottom Line....Build your **Mutual Business Plan**





Plan – Detailed action plan with timelines

If you Fail to Plan, You Plan to Fail.





People - Preparing the Internal Teams

Who for what?

- Exchange Contact Lists and Facilitate Introductions
 - Provide org charts and coverage maps
 - Identify the decision makers and ensure they're part of the process
 - Be clear on the escalation path for everyone to get answers and/or resolve issue and conflicts quickly
 - Introduce field sales leaders and marketing teams
 - Introduce contacts in functional areas like finance, quality, engineering, operations, etc.
 - Usually the branch and manufacturer's rep already have some level of relationship due to other line engagements --- leverage this history to better understand the best path to the target customers





Policies & Procedures – Business Practices

How do we get things done?

- Become proficient in the utilization of the various on-line systems, websites and administrative portals
 - What are the business guidelines and rules?
 - Pricing – check pricing, request special pricing/debits
 - DREG - How to enter, registration mins, protection %
 - Orders - How to place orders and check open order status
 - Where to find:
 - literature
 - white papers
 - forms (SPA, DREG, etc)





Products – Be prescriptive product focus

What Products and Applications are best fits for wins

- Product Focus – ensure you are aligned on the focus products for the supplier. Where are they REALLY competitive.
- If products or applications are not clear, then sales brings opportunities that may not be supported. A real turn-off.
- Are there products that are in Harvest mode? Again, be clear.
- Product Training - Provide training to the sales teams on the initial focus products
 - Focus on application selling....stay away from heavy technical details
 - Build a schedule for local training in the field, at the branch
 - If possible, utilize online tools to keep track of training progress



Now It's Time to Launch

- Ok, everyone is trained, our focus is identified, the stock is in place, the website shows stock, we know who to call for help, and goals are established.
- Agree on Press Announcements and release to the public
- Conduct Social Media posts
- Notify customers
- Execute buddy calls to initial customer targets
- Fill the funnel



Pitfalls - Lessons from a HOT STOVE

- Lessons from a failed launch --- It burns...and it's supposed to
- What did we learn from it?





Parting Thoughts

- Place emphasis on building sustainable business
 - Little to NO emphasis on revenue targets for short term
 - Focus on the activity that will build your foundation
- Establish checkpoints to review your progress
 - It will help you understand what is going right and what is going wrong
 - Adjust as needed and address issues quickly
- Success will not happen by accident. “If you don’t have time to DO IT RIGHT, when will you have time to DO IT OVER?”
- Keep the momentum going.....forever!

Thank You

