Channel Guide

Part of: Habit 2: Sales Process

Why you need it: This channel guide will help you to assess and validate the channels you use to reach your customers

Project time	Level	Audience	Benefit
1 day	**Intermediate**	**Sales Leader**	**Practical Advice**

About this guide

This guide will help you to define your customers buying preferences and map them to their preferred sales channel.

Tips for success

Role: does the channel serve your priority customers and the types of deals you want to make?

Offer: does the channel provide the right customer experience?

Avoid overlap: make sure you don't have multiple channels competing for the same customer

Collaboration: ensure cross-channel collaboration

Sales Channel Output

A clear matrix of customers and their aligned sales channels

Useful links

- Sales process overview
- Process Overview
- Sales Excellence
- Sales Excellence toolkit

Channel Guide

1. **Examples of sales channels**
   - Outside/External Sales (mix of virtual interaction and visiting customers)
   - Inside Sales (phone, email, online chat)
   - Customer Service (phone, email, online chat reactive)
   - Service (application engineers)
   - Technical department (technical support)
   - Tender teams (for complex tenders)
   - E-commerce (customer self-service)
   - Channel partners (distributors, resellers, agents)
   - Other Diploma businesses
   - EDI / API integrations (automated order flows)

2. **Map customer to buying preference and allocate channel**

Customer Segment	Customer Persona	Buying Preference	Aligned Sales Channel
Large OEMs	Procurement Manager	Customer solution, high touch	Field sales + Technical Support
Small repair shop	Owner/Operator	Quick ordering, price transparency	E-commerce + Inside Sales
Resellers	Buyer	Volume orders, EDI preferred	EDI + Inside Sales