

Channel Playbook Methodology “Channel/1”



Channel/ 1: Entry & exit management

1

Channel structure definition and sizing

- 1.1 Market/ customer segmentation
- 1.2 Market segment potential
- 1.3 Appropriate channel structure definition
- 1.4 Channel productivity & economics
- 1.5 Channel sizing

2

Channel partner identification & appointment

- 2.1 Channel partner profile and infrastructure
- 2.2 Channel partner selection criteria and risk profile
- 2.3 Territory mapping
- 2.4 Channel productivity & economics
- 2.5 Roles and responsibilities

3

Channel partner exit management

- 3.1 Exit initialization and approval
- 3.2 Communication to stakeholders
- 3.3 Collection of materials, goods
- 3.4 Accounts settlement

Channel/ 1: Strategic relationship management

4 Business planning & customer allocation

- 4.1 Customer/ key accounts allocation
- 4.2 Developing business plans
- 4.3 Setting targets

5 Channel partner classification & service levels

- 5.1 Strategic and operational parameter definition
- 5.2 Rating and evaluation of channel partners
- 5.3 Classifying channel partners
- 5.4 Service level definition

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Channel/ 1: Performance management

6 Performance management

- 6.1 Evaluating performance
- 6.2 Review mechanisms and action planning
- 6.3 Reward and recognition management

7 Channel partner training

- 7.1 Define type of trainings
- 7.2 Plan for regular trainings
- 7.3 Analyse training adherence metrics

Channel/ 1: Business development management

8 Lead & customer/ retailer management

- 8.1 Customer allocation
- 8.2 Lead generation
- 8.3 Lead follow-up and closure
- 8.4 After sales management

9 Retail intelligence

- 9.1 Consumer journey
- 9.2 Consumer behaviour
- 9.3 Identifying new business Opportunities

10 Visits and journey planning

- 10.1 Planning regular visits
- 10.2 Discussion on performance, issues faced and other administrative tasks

Channel/ 1: Transactions management

11 Trade promotions

- 11.1 Promotion scheme definition
- 11.2 Scheme management

12 Order management

- 12.1 Order taking
- 12.2 Credit verification
- 12.3 Price and discount verification
- 12.4 Order placing
- 12.5 Order fulfillment
- 12.6 Payment collection

13 Materials management

- 13.1 Carry optimum stock levels
- 13.2 Control returns of damage and expiry

14 Complaint management

- 14.1 Complaint assignment
- 14.2 Complaint resolution
- 14.3 Post resolution analysis

Channel/ 1: Reporting and risk management

15 MIS and reporting

15.1 Report definition

15.2 Regular reporting process definition

16 Risk & compliance management

16.1 SLA definition

16.2 Information compliance

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