The Definitive Guide to Choosing a Managed Sales Partner

You've decided to engage a managed sales partner to expand your sales channels, but how do you know which one is the best fit for you? This guide is your roadmap to evaluating your prospective partner.

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You've decided to engage a managed sales partner to expand your sales channels, but how do you know which one is the best fit for you? Is it possible for one revenue generation partner to meet all your needs? What can you realistically expect the ideal partner to help you achieve?

This guide is your roadmap to evaluating your prospective partner. It is informed by insights we've gained through years of working with some of the world's most iconic brands, learning what they look for in a managed sales partner and the criteria they use when selecting one. Through this experience, we have identified the core capabilities to look for not just in a rev gen partner, but an outperforming one—qualities that signal a fruitful partnership and successful sales initiatives.

You want to work with outperformers. Outperformers will embody business practices that mirror how they'll work with you. How can you identify them?

Selecting an Outperforming Managed Sales Partner

There are *high-performing* sales teams, and there are *outperforming* sales teams. You want to work with *outperformers*.

CONTENTS

CORE CAPABILITIES

It starts with core capabilities. To determine whether your prospective partner has the sales sophistication and capacity you need to accelerate your sales and elevate your customers' experience, look at these core factors.

CORE CAPABILITIES

- [ ] **Is B2B sales the essence of the organization, or is it one of the many things they do?**

  Understanding whether they are highly focused on sales will give you a good sense of the level of focus, knowledge, and experience the organization will bring to your engagement.

- [ ] **What is the organization's commitment to the highest levels of performance? How do they track and demonstrate performance?**

  You're hiring a managed sales partner to deliver results, so understanding their commitment to and method of reporting on performance is essential.

- [ ] **Is the organization current in the way it thinks about B2B buyers and sales?**

  A lot has changed in B2B buying and selling in the past few years. Assure yourself that your partner understands these shifts and has adapted to meet buyers where they want to be met.

- [ ] **How does the organization view technology? Is it simply an enabler, or is it a means of driving effectiveness, efficiency, and optimization?**

  Companies that understand the true value of technology and exploit its use to drive improved performance are often more innovative and have greater vision. Verify whether their technology increases sales activities, and if so, how.

CORE CAPABILITIES

- ☐ **Do their business practices and culture align with your goals and values? Are they going to take steps to protect your brand? If so, how?**

  A managed sales partner becomes an extension of your organization, so you will want to choose one that is well-aligned and with which you can see yourself working for the long term.

- ☐ **Do they have a track record of results with successful brands?**

  Past performance is a strong indicator of future performance. Partners that can demonstrate consistent success have a strong likelihood of success working with you.

RECRUITING, ONBOARDING, AND COACHING

Your sales goals are only within reach when backed by a talented, trained team that's positioned for continual growth. Beyond an internal recruiting team, look for a partner who has specialized, skilled sales recruiters in-house. Sales recruiting professionals understand the nuances associated with your product, your industry, and the unique skills and capabilities required to move customers through your sales pipeline. Use these criteria to assess your prospective partner's recruiting, onboarding, and coaching capabilities.

- [ ] **How big is their internal recruiting team?**

  They should have a sufficiently large team to support an always-on recruiting engine that ensures a ready, steady talent pool.

- [ ] **Are their recruiters all in-house, or do they rely on outsourced recruiters?**

  In-house recruiters have the advantage of being part of the full team of B2B sales professionals, managed–and held accountable–as a key part of the client's program, immersed in the corporate culture, and as dedicated to overall program performance as the sellers they recruit.

- [ ] **What are their standard SLAs for hiring speed?**

  If they lack SLAs, or their SLAs don't reflect a sense of urgency, that could be a red flag. Pay close attention to this issue.

- [ ] **Do they have an always-on recruitment strategy to maintain a steady pipeline of qualified candidates?**

  In today's war for talent, being intentional, relentless, and proactive is essential.

- [ ] **Do they have an always-on recruitment strategy to maintain a steady pipeline of qualified candidates?**

  In today's war for talent, being intentional, relentless, and proactive is essential.

- [ ] **Do they have a robust onboarding/training program?**

  Recruiting is only half the battle. Engaging onboarding and ongoing mentorship empower sellers for long-term success.

- [ ] **Is coaching core to their talent development strategy?**

  Behind all outperforming sales teams are leaders who prioritize coaching.

- [ ] **What are their standard SLAs for hiring speed?**

  If they lack SLAs, or their SLAs don't reflect a sense of urgency, that could be a red flag. Pay close attention to this issue.

For more information, read the blog, ***Tips for Hiring a High Performing B2B Sales Team***.

SELLERS

A rev gen partner's sellers become an extension of your organization. While augmenting your sales team with a provider removes you from the hiring front lines, you need to know your prospective partner has sound retention practices. Ask these best practice questions.

SELLERS

☐ **Does the partner contract or hire its sellers?**

Naturally, employees have a greater vested interest in the partner's success, and therefore, in the client's success, than contracted sellers will. As part of the corporate team, employees know their organization wants them to succeed and will support and invest in their success.

☐ **Do they offer employee benefits?**

Sellers who do not receive the same benefits as others in the organization are bound not to think of themselves as fully part of the team—something that is certain to impact performance.

☐ **What is the turnover rate of their sellers?**

Look for a partner who significantly beats the B2B average, which falls between 35 – 40%.

☐ **How are selling skills evaluated? How do they determine suitability for inside vs. outside sales?**

Top selling organizations assess their sellers, identify areas for skills development, and have ongoing training, development, and coaching programs in place to ensure their sellers operate at peak performance.

☐ **How do they address sales territories?**

Ask your partner if they have a methodology for determining and optimizing territory assignments.

Outperformers are 62% more effective in using digital tools than slow growers.

Source: McKinsey

TECH STACK

Behind every outperforming sales team is a tech stack empowering them to operate at peak productivity and efficiency. The ideal partner will approach sales technology as more than an enabler, but as a foundation, integral to sales effectiveness, efficiency, and optimization. Look for these indicators.

TECK STACK

☐ **How do they integrate sales technology into their sales workflow? Do they customize the technology so that it mirrors the optimal flow they identify that the salespeople should follow, or do they use out-of-the-box settings that their sellers have to adapt to?**

The sales process should determine how their sellers use the technology, not the other way around. Look for a partner who streamlines the technology and puts the tech to work for your sellers, rather than leaving the sellers working for the technology.

☐ **What is the rate of adoption of sales technology by their sellers? If it's low, what are the reasons for non-adoption? Insufficient training?**

Adoption is as important as the promise of the tool itself. If you have sales technology, your sellers should be using it 100% of the time. If they're not, it's not useful to them, and neither they nor your organization will benefit.

☐ **What technologies do they use to increase the skill and acumen of their sellers? How do they use those technologies to increase skill and acumen?**

Look for a partner who has adopted coaching technologies that make it easier for managers to consistently assess, coach, and train their team. There are many technologies that enable this. Software that allows managers to listen to sales calls and document one-on-ones helps them become better leaders. Tools like voice analytics look for key phrases and provide feedback to the manager and the seller. Make sure your prospective partner uses them proficiently and effectively to improve their ability to manage and upskill their sales team.

☐ **What technologies do they use to automate sales processes?**

What processes do those technologies automate (including those as simple as hand-offs)? Sales technologies can now automate more than 30% of sales activities. Look for a partner who optimizes automation opportunities and ties their technology to proven processes.

- [ ] **What technologies do they use to arm sellers with information that aids them in their selling?**

  What types of information do those technologies provide? Your partner should know how to interact with and maximize everything about your data, from sources, to access to firmographics and demographics, to scoring accounts, to cleansing, to territory planning, helping sellers prioritize both their day and which accounts to contact first.

- [ ] **What technologies do they use to eliminate wasteful steps in the sales process? How do they use those technologies to eliminate wasteful steps?**

  Do they use auto-dialers and similar tools that take easily automated steps out of the seller's hands? A partner who uses process mapping will be able to pinpoint where there are wasteful steps.

- [ ] **What level of involvement do your instructional designers (IDs) have in evaluating the skills and acumen sellers need to perform each process at its highest level? How much training do they provide to your sellers on each piece of technology?**

  The IDs should understand the skills and acumen of each seller so they can build a path and a plan to get them where they need to be. Training should be ongoing to ensure they know how to use the technology and have ways to keep their skills and knowledge fresh

- [ ] **Who has responsibility for discovering, evaluating, implementing, and adopting sales technology? Is it IT or sales?**

  If it's IT, be careful. Their priority may be to deploy and manage mission-critical technology (such as security or infrastructure) that can make it challenging for them to keep their eye on the sales technology ball. Sales is in the best position to determine the priority and suitability of the technology the sales team needs to excel. Sales technologists will be best able to quickly and easily assess whether it meets their team's needs and fits into the existing sales tech stack.

| For more information on this topic, read our blogs, ***How to Build a Kick-A$$ Tech Stack*** and ***Cracking the Sales Tech Stack Code***.

Most salespeople typically spend 65% of their time on non-selling tasks.

Source: InsideSales

SALES PROCESS

Out-of-tune sales processes render the best sellers and technology inefficient at best, and at worst, ineffective. Finely tuned processes underpin the other core aspects—people and technologies—that keep a sales engine operating at peak performance. They can help you not only avoid sales-stunting pitfalls but can accelerate your revenue growth. Ask your future rev gen partner the following questions.

SALES PROCESS

- [ ] **Do they design a sales process?**

Documenting the sales process creates a record and establishes a reference point for identifying the need for any adjustments and improvements.

- [ ] **If they do, is it custom-crafted and finely tuned to your business, markets, personas, buyers, customers, partners and how you go to market?**

Sales processes should reflect the unique sales environment, buyers, sales objectives and more.

- [ ] **Do they have Business Process Engineers (BPEs)? What role do their BPEs play in evaluating and optimizing your sales processes? How do they design processes for each client engagement?**

BPEs use engineering principles to apply discipline to creating and optimizing sales processes. Look for a vendor who has expert BPEs that can assess your processes (including where handoffs happen), looking for gaps, redundancies, and opportunities where streamlining and tech solutions could have an impact. A strong partner will be able to configure your sales environment in a way that guides your sellers.

- [ ] **Do their sales teams use a multichannel approach to connect with buyers?**

  Research shows that 68% of outperformers combine traditional channels in the customer journey, and that sellers that use a multichannel approach—beyond just email and phone—achieve greater results. Your partner should be able to set sellers up for omnichannel selling motions.

- [ ] **How much time do their sellers spend on administrative activities?**

  While some administrative tasks are to be expected, your prospective partner should optimize the time reps spend selling to ensure you are receiving the greatest benefit.

- [ ] **What is their sales methodology? Do they have their own proprietary sales methodology or use one from a sales training company?**

  Ask to see their sales methodology to determine if it meets modern sales approaches to meeting the buyer where they want to be found.

For more information on this topic, read ***Building a Bespoke Sales Practice***.

RESOURCES

From people, to process, to technology, you want a partner who has deep expertise across the sales ecosystem. Find out whether they're resourced to support you, even as you scale and your needs change.

RESOURCES

- [ ] **Do they have client-dedicated resources?**

Some vendors divide up client resources, relegating you to share resources with other clients and interact with a support team that is required to have expert knowledge in multiple industries and products and shift gears throughout the day.

- [ ] **Do they enable their sellers with training and coaching? Are their managers charged with and skilled at coaching?**

You want a partner that's quickly able to identify training gaps and provide what's needed, as well as managers who are responsible for coaching, and have access to the technology to support it.

- [ ] **Do they have a dedicated implementation team?**

You should know the names of the staff resources that are part of your team and know whom to contact, how, when, and for what.

- [ ] **Do they have business analysts and a reporting team to research and share market intelligence?**

You want to ensure that you have a team looking at reports, building dashboards, measuring and reporting on results—the things you're learning together as a result of your engagement.

CONTINUOUS IMPROVEMENT AND OPTIMIZATION

Over time, your needs will likely change. It's best to look for a partner who is not only agile enough to grow with you but has an always-on innovation cycle to surface potential problems and help you reach your goals faster. Ask these questions to understand their optimization methodology.

CONTINUOUS IMPROVEMENT AND OPTIMIZATION

- [ ] **Do they have a continuous improvement program and cadence?**

  Look for a partner that is dedicated to ongoing improvements, where they are consistently looking to refine and improve to achieve maximum results.

- [ ] **Do they have a sales operations team to monitor reports, dashboards, KPIs, and tech stack performance?**

  Be sure that your partner is monitoring and reporting on sales performance, builds dashboards that provide a consistent period-over-period view of KPIs, and regularly evaluates whether sellers are using technologies appropriately, or require additional training.

To explore how a commitment to continuous improvement can impact sales, read our blog ***Innovating at the Speed of Sales***.

RESULTS

You should expect your partner to deliver measurable improvements in your business outcomes. It’s why you sought help in the first place. By injecting your efforts with sales-immersed people, processes, and technologies, you can fast-track your sales and exceed your goals.

RESULTS

- [ ] **What KPIs do they use to measure results?**

  You and your partner must agree upon the critical metrics that they will measure and report upon to ensure that your sales are tracking against goals.

- [ ] **What is their goal attainment percentage?**

  Ask what percentage of their goals your partner has achieved for other clients. It will give you a sense of what you can expect for your program.

- [ ] **When and how do they ascertain and assimilate your goals? Is it during the contract or the implementation phase? Does your partner seek to understand your goals before you enter into an agreement or only when they begin to implement the program?**

  Partners that fully engage in acknowledging and incorporating your goals are more apt to build a sales program that will achieve them.

- [ ] **Is the goal-setting process collaborative?**

  Collaboration makes it a true partnership and ensures that your partner is fully on board with the stated goals.

COMPANY CULTURE AND DIVERSITY

Don't overlook cultural compatibility between you and your partner. It can make or break a successful relationship. You want a partner whose core values align with your own and who can demonstrate a commitment to those values.

- [ ] **What kind of culture do they have?**

  A partner whose culture is aligned with yours will likely be a better, lasting fit.

- [ ] **Do they have a Diversity and Inclusion (D&I) strategy and/or initiative?**

  Ask potential partners about their D&I initiatives and assess their level of intentionality in hiring and developing talent.

- [ ] **Do you notice gender bias in senior leadership roles? At any level?**

  These and similar questions will help you to determine whether everyone within the organization is valued and has a voice, and whether the company creates space for those voices to be heard.

CUSTOMERS

Your success is your partner’s success. A strong partner will recognize this and be structured to drive your sales initiatives, whether it’s increasing revenue from new customers or markets, or maximizing profitability from existing customers. You should assess the following key areas.

CUSTOMERS

- [ ] **Do they have other clients in your industry?**

  This will demonstrate industry experience and expertise.

- [ ] **What is their average client tenure?**

  Client tenure can reflect the health of the relationship, as well as satisfaction with achieving results.

- [ ] **What are their current customer and program churn rates?**

  High turnover in either of these areas may be a symptom of poor client relationships, lack of program success, and more.

- [ ] **Do they offer customer references?**

  You might be surprised at how many companies either skip this step or don't follow through and contact references. Customer references can paint a fuller picture of what it's like to work with your prospective partner.

EXPERIENCE

To earn your confidence that they can serve as an extension of your brand, your partner needs to demonstrate they’re immersed in sales solutions and have relevant experience that can empower you to achieve things you couldn’t on your own.

EXPERIENCE

- [ ] **Do they have channel experience?**

If you work with channel partners, it's important to understand what experience your potential partner has. If they're new to working in the channel ecosystem, it may be wise to move on to someone with proven experience.

- [ ] **What experience do they have in your industry?**

Industry experience suggests that your vendor will be able to get up to speed more quickly and will bring knowledge and prior learnings to your engagement.

- [ ] **Can they point to case studies relevant to your industry, needs, and goals?**

Seeing how the partner has worked with other companies like you can be a good bellwether of what kind of engagement you can expect.

A FEW MORE IMPORTANT THINGS

What happens once you've selected your partner is just as important as during your process to select them. You need to understand and have unconditional confidence in how they'll serve you once you've signed on the dotted line. Here are some factors you might not have thought to ask until now.

A FEW MORE IMPORTANT THINGS

- ☐ **Do they have an implementation/start-up fee?**

  Some companies charge a fee to get your program set up and before they begin selling. It's good to know this up front.

- ☐ **Who will be part of your implementation team?**

  Learn which team members you will engage with as your program is set up. Are named individuals dedicated to your program? What role does each one play?

- ☐ **Do they have implementation SLAs? What are they?**

  SLAs suggest that the organization values and adheres to timelines and other metrics and demonstrates that they hold themselves—and you—accountable.

- ☐ **Once you're up and running, will a support team be accessible to you and your team?**

  Knowing the channels of communication, who your contacts are and their areas of responsibility, the frequency of meetings, reporting and other communication channels, and more, will give you a good sense of how the partner is organized to manage and ensure the health of your relationship.

THE COMPLETE CHECKLIST

CORE CAPABILITIES

- [ ] Is B2B sales the essence of the organization, or is it one of the many things they do?
- [ ] What is the organization's commitment to the highest levels of performance? How do they track and demonstrate performance?
- [ ] Is the organization current in the way it thinks about B2B buyers and sales?
- [ ] How does the organization view technology?
- [ ] Do their business practices and culture align with your goals and values? Are they going to take steps to protect your brand? If so, how?
- [ ] Do they have a track record of results with successful brands?

RECRUITING, ONBOARDING, AND COACHING

- [ ] How big is their internal recruiting team?
- [ ] Are their recruiters all in-house, or do they rely on outsourced recruiters?
- [ ] What is their fill rate (the percentage of roles they've filled)?
- [ ] What are their standard SLAs for hiring speed?
- [ ] Do they have an always-on recruitment strategy to maintain a steady pipeline of qualified candidates?
- [ ] Do they have a robust onboarding/training program?
- [ ] Is coaching core to their talent development strategy?

SELLERS

- ☐ Does the partner contract or hire their sellers?
- ☐ Do they offer employee benefits?
- ☐ What is the turnover rate of their sellers?
- ☐ How do they evaluate selling skills? How do they determine suitability for inside versus outside sales?
- ☐ How do they address sales territories?

TECH STACK

- ☐ How do they integrate sales technology into their sales workflow? Do they customize the technology so that it mirrors the optimal flow they identify that the salespeople should follow, or do they use out-of-the-box settings that their sellers have to adapt to?
- ☐ What is the rate of adoption of sales technology by their sellers? If it's low, what are the reasons for non-adoption? Insufficient training?
- ☐ What technologies do they use to increase the skill and acumen of their sellers? How do they use those technologies to increase skill and acumen?
- ☐ What technologies do they use to automate sales processes? What processes do those technologies automate (including those as simple as hand-offs)?
- ☐ What technologies do they use to arm sellers with information that aids them in their selling? What types of information do those technologies provide?

TECH STACK, CONTINUED

- [ ] What technologies do they use to eliminate wasteful steps in the sales process? How do they use those technologies to eliminate wasteful steps? Do they use auto-dialers and similar tools that take easily automated steps out of the seller's hands?
- [ ] What level of involvement do your instructional designers (IDs) have in evaluating the skills and acumen sellers need to perform each process at its highest level? How much training do they provide to your sellers on each piece of technology?
- [ ] Who has responsibility for discovering, evaluating, implementing, and adopting sales technology? Is it IT or sales?

SALES PROCESS

- [ ] Do they design a sales process?
- [ ] If they do, is it custom-crafted and finely tuned to your business, markets, personas, buyers, customers, partners and how you go to market?
- [ ] Do they have Business Process Engineers (BPEs)? What role do their BPEs play in evaluating and optimizing your sales processes? How do they design processes for each client engagement?
- [ ] Do their sales teams use a multichannel approach to connect with buyers?
- [ ] How much time do their sellers spend on administrative activities?
- [ ] What is their sales methodology?

RESOURCES

- ☐ Do they have client-dedicated resources?
- ☐ Do they enable their sellers with training and coaching?
- ☐ Do they have a dedicated implementation team?
- ☐ Do they have business analysts and a reporting team to research and share market intelligence?

CONTINUOUS IMPROVEMENT AND OPTIMIZATION

- ☐ Do they have a continuous improvement program and cadence?
- ☐ Do they have a sales operations team to monitor reports, dashboards, KPIs, and tech stack performance?

RESULTS

- ☐ What KPIs do they use to measure results?
- ☐ What is their goal attainment percentage?
- ☐ When and how do they ascertain and assimilate your goals?
- ☐ Is the goal-setting process collaborative?

COMPANY CULTURE AND DIVERSITY

- ☐ What kind of culture do they have?
- ☐ Do they have a Diversity and Inclusion (D&I) strategy and/or initiative?
- ☐ Do you notice gender bias in senior leadership roles? At any level?

CUSTOMERS

- [ ] Do they have other clients in your industry?
- [ ] What is their average client tenure?
- [ ] What are their current customer and program churn rates?
- [ ] Do they offer customer references?

EXPERIENCE

- [ ] Do they have channel experience?
- [ ] What experience do they have in your industry?
- [ ] Can they point to case studies relevant to your industry, needs, and goals?

A FEW MORE IMPORTANT THINGS

- [ ] Do they have an implementation / start-up fee?
- [ ] Who will be part of your implementation team?
- [ ] Do they have implementation SLAs? What are they?
- [ ] Once you're up and running, how will your support team be accessible to you and your team?

When you compare managed sales partners, we're confident you'll find that MarketSource comes out on top. We can begin accelerating your sales right away. **Contact us to learn how.**