

Choosing a Managed Sales Partner: The Definitive Guide for Consumer Brand Companies

This guide will help you evaluate whether a prospective partner truly understands the consumer brands landscape and what to look for when identifying an outperforming partner.

MARKETSOURCE®

Consumer brand companies today face margin pressure, intense retailer influence, and rapidly shifting consumer preferences. At the same time, selling across fragmented channels (including regional and independent grocery, drug, hardware, value, and wholesale/distribution partners) requires a highly coordinated and disciplined approach. Compressed promotion cycles, evolving shopper expectations, and the complexity of omnichannel execution make strategic account management critical.

A managed sales partner works as an extension of your brand. From strategic account planning and customer relationship management, to retail execution, product promotion, merchandising support, and trade optimization, the right partner helps drive sustainable growth across every channel and customer touchpoint.

Selecting an **Outperforming** Managed Sales Partner

There are *high-performing* sales teams, and there are *outperforming* sales teams.

You want to work with outperformers.

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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.

- **Do they understand the consumer brands ecosystem and buyer behavior?**

  Expect experience with major banners, regional grocers, independent drug establishments and pure-play marketplaces.

- **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 buyers and sales? A lot has changed in how consumer brands sell, and consumers buy in the past few years. Are they fluent in omni-merchandising and shelf realities?**

  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.

- **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.

- **Can they demonstrate success with consumer brand companies like yours (size, sub-category, growth stage)?**

  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, + 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 sales professionals, managed—and held accountable—as a key part of the client's program, immersed in the consumer brands industry, and as dedicated to overall program performance as the sellers they recruit

- **What is their fill rate (the percentage of roles they've filled)?**

  It's reasonable to expect rates as high as 92 to 95%.

- **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.

RECRUITING, ONBOARDING, + COACHING

- **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.

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.

- **Does the partner contract or hire their 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 receive benefits are more likely 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 industry average, which falls between 35 and 40%.

- **How do they evaluate selling skills and consumer brands acumen? How do they determine suitability for inside versus outside sales?**

  Top selling organizations assess their sellers, identify areas for specific skills development, and have ongoing training, development and coaching programs in place to ensure their sellers always have the knowledge and skills needed for peak performance.

- **How do they address sales territories and account planning?**

  Consumer brands require thoughtful coverage by banner, region, and store cluster, not simply geographic splits.

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

Source: McKinsey

TECH STACK

Behind every outperforming 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 the following indicators.

- **How do they integrate sales technology into their sales workflow? Do they customize it so that it mirrors the optimal flow 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 tech 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 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 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 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.

- **Do they have an intentional process for reviewing and assessing technology from a sales perspective? Who's involved?**

  A strong partner will evaluate all potential tech through a lens of sales workflows, process optimization, and continuous improvement. A provider that takes a collaborative implementation approach and pulls in the right stakeholders who understand your goals is taking the best approach to gaining a tech stack that's optimized to deliver your results. Moving too far forward without the right people engaged could put your entire program at risk.

- **Do they have a strategy to balance the risks and rewards of AI?**

  AI's ability to drive efficiencies through huge chunks of the sales process makes it powerful, but incorporating AI into business and workflows to realize the promise of AI responsibly is no small task. Given the volume and rapid evolution of AI and other sales tech tools, your ideal partner will have a team dedicated to vetting emerging tech like AI and have an approach that maximizes the efficiencies of AI without putting your business at risk.

SALES PROCESS

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

Source: InsideSales

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.

- **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 an omnichannel approach to connect with buyers?**

  Research shows that **68%** of outperformers combine traditional channels in the customer journey, and that sellers that use an omnichannel 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.

RESOURCES

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

- **Do they have client-dedicated resources who understand the consumer brands environment?**

  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. Consistency with key buyers and store operations drives trust and speed.

- **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 because of your engagement.

CONTINUOUS IMPROVEMENT + 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.

- **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.

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. Ask the following questions.

- **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—especially with other consumer goods companies. Look for upward trends in revenue and stronger channel performance.

- **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 + COMMITMENT

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, who can demonstrate a commitment to those values, and is dedicated to the longevity of your relationship. Look for the following indicators.

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

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

- **Do they value relationship longevity?**

  Not performatively but as a sign of their deep investment in your company and your long-term success. A strong partner will have multiple long-term clients.

- **Can they share client testimonials?**

  Even if they're anonymous, statements by actual consumer brands clients give you a sense of what it's like to work with them.

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 consumer brands 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. Find out the following.

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 yours 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.

- **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. Find out if named individuals are dedicated to your program and what role each one plays.

- **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, how will your 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

- ❑ Do they understand the consumer brands ecosystem and buyer behaviors?
- ❑ 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 consumer brands 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, + 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 and suitability for inside versus outside sales?
- ❑ How do they address sales territories?

TECH STACK

- ❑ How do they integrate sales technology into their sales workflow?
- ❑ 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—and how do they use them— to increase the skill and acumen of their sellers?
- ❑ What technologies are used to automate sales processes and what processes do they automate?
- ❑ What types of information do they provide?
- ❑ What technologies are used to eliminate wasteful steps in the process?
- ❑ Do they have an intentional process for reviewing and assessing technology from a sales perspective?
- ❑ Do they have a strategy to balance the risks and rewards of AI?

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 BPEs and if so, what role do they play in evaluating and optimizing your sales processes? How do they design processes for each client engagement?
- ❑ Do their sales teams use an omnichannel 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 + 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?

THE COMPLETE CHECKLIST

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 + COMMITMENT

- ❑ What kind of culture do they have?
- ❑ Do they value relationship longevity?
- ❑ Can they share client testimonials?

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?

When you compare managed sales partners in consumer brands, we're confident that you'll find MarketSource comes out on top. We unify headquarter selling, field execution, and more so you win distribution, grow velocity, and protect trade ROI. Contact us to learn how we can accelerate your revenue across every shelf.

Contact us to learn how.

MarketSource, an Allegis Group company, is a sales acceleration company focused on delivering better outcomes for many of the world's most iconic brands. We design and operationalize sales and customer experience solutions for consumer brands in B2B and B2C environments. Our solutions are purpose-built and tech-enabled to deliver measurable improvements in business outcomes.

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