

Building and Sustaining Share of Heart: The Path to Partner Excellence

Understanding the Share of Heart framework is one thing—implementing it successfully is another. While the three pillars of Goals, Roles, and Market Demand provide the strategic foundation, translating these principles into daily practice requires specific discovery techniques, sustained engagement strategies, and awareness of the pitfalls that undermine even well-intentioned partnerships.

This article explores the practical processes for building Share of Heart relationships from the ground up, the ongoing strategies that maintain partner influence over time, and the common mistakes that can derail your channel success. Whether you're launching a new channel program or revitalizing existing partnerships, these insights will help you create the kind of relationships where partners actively champion your solutions.

Building Influence Through Deep Discovery

The foundation of influence in channel relationships is deep understanding. You cannot align goals, define effective roles, or capture market demand without first discovering the realities of your partner's business. But effective discovery goes beyond gathering information—it positions you as a strategic advisor who helps partners think differently about their business, their customers, and their opportunities.

Understanding Product Evaluation Processes

Start by understanding how your partners make decisions. Ask questions like: How do your customers evaluate new products or processes for their practices? How do you evaluate the products you decide to introduce to your customers? What criteria matter most in your product selection process? These questions reveal not just what partners value, but how they make the critical decisions that determine whether your products get priority or get ignored.

Understanding Relationship Building

Partners succeed based on the strength of their customer relationships. Discover their relationship-building approach by asking: What are some things you do to stay relevant to your network of customers? What do your top accounts trust you to do for their practice? What sort of things do you do for your accounts to maintain their confidence and trust? Understanding how partners build and maintain customer trust shows you where you can add value to strengthen those relationships.

Understanding Introduction Strategy

Learn how partners introduce new products by asking: How do your accounts expect you to introduce new products that you believe will benefit their practices? How do you encourage your customers to review products that you believe will help them if they haven't heard about these products? What is the last successful new product introduction you brought into a practice? How did that go? What would you do differently

the next time? These questions reveal the practical realities of how partners sell and where your support can make the biggest difference.

Understanding Challenges and Current Environment

Uncover obstacles and opportunities by asking: What are some of the things that make introducing new products to your customers difficult? What are your top accounts concerned with when you introduce new products? What are your customers looking for in products or processes in the current business environment? How have customer priorities shifted in recent months? These questions help you identify where you can remove barriers and align your offerings with current market demand.

The Art of Active Listening

Asking great questions is only half of effective discovery—the other half is truly hearing and processing the answers. Active listening means listening without planning your next response, noticing what isn't said as much as what is said, asking follow-up questions to understand context and implications, validating your understanding by summarizing key points, and taking detailed notes for future reference and follow-up.

The real value of discovery comes from transforming information into insights. After each discovery conversation, identify patterns across multiple conversations with the same partner. Compare insights across different partners to spot market trends. Connect partner challenges to capabilities you can provide. Identify gaps where neither you nor your partner currently has a solution. Develop hypotheses about how to create more value together. These insights become the foundation for all your strategic decisions about the partnership.

Strategies for Sustained Influence

Building initial influence is important, but sustaining it over time requires ongoing commitment to specific behaviors and strategies that reinforce your value and strengthen the relationship.

Consistency and Reliability

Nothing builds influence faster than being consistently reliable. Follow through on every commitment, no matter how small. Respond promptly to partner requests and questions. Maintain consistent communication rhythms with weekly check-ins, monthly reviews, and quarterly planning sessions. Be honest when you don't know something rather than making up answers. Admit mistakes quickly and fix them thoroughly. Partners give their attention and mindshare to people they can count on. Be that person.

Providing Value Beyond Products

Strong channel relationships transcend product transactions. Find ways to add value that extend beyond your immediate product portfolio. Share market intelligence and competitive insights. Introduce partners to potential customers or other valuable contacts. Provide training on sales skills, not just product knowledge. Help partners solve problems even when your products aren't the solution. Connect partners with industry thought leaders or experts. This expanded value creation deepens

relationships and differentiates you from competitors who only show up when they need something.

Celebrating Wins Together

Recognition and celebration reinforce positive behaviors and strengthen relationships. When partners succeed with your products, acknowledge their contribution prominently and specifically. Share success stories within your organization with partner permission. Create opportunities for partners to showcase their expertise. Provide recognition that matters to them, whether it's awards, rankings, or executive visibility. Celebration creates positive associations with your partnership and motivates continued excellence.

Problem-Solving Partnership

How you handle challenges defines your relationship more than how you handle successes. When problems arise, own issues that are your responsibility without making excuses. Partner with them to solve problems rather than pointing fingers. Escalate quickly when necessary rather than letting problems fester. Follow up to ensure issues are fully resolved. Learn from challenges and implement process improvements. Your response to adversity either builds or erodes trust—choose to build it.

Strategic Business Reviews

Regular strategic business reviews keep partnerships aligned and productive. These reviews should review performance against goals and metrics, celebrate successes and analyze wins for replicability, identify challenges and develop action plans, adjust strategies based on market changes, set goals and priorities for the next period, and strengthen personal relationships across both organizations. Quarterly reviews provide the structure for continuous improvement and strategic alignment.

Continuous Learning and Adaptation

Markets change. Customers evolve. Competition intensifies. Partners who see you staying current and adapting respect your professionalism and want to stay connected. Demonstrate continuous improvement by staying informed about industry trends and emerging technologies, seeking feedback from partners and acting on it, experimenting with new approaches and sharing learnings, bringing fresh ideas and perspectives to conversations, and investing in your own professional development.

Common Pitfalls and How to Avoid Them

Even with the best intentions and strategies, channel relationships can falter. Understanding common mistakes helps you avoid them and maintain strong partnerships over time.

Pitfall 1: Treating Partners Like Employees

This manifests as making demands instead of requests, expecting partners to prioritize your products over others without earning that priority, or failing to recognize partners' autonomy and business interests. Avoid this by always framing asks as opportunities rather than obligations. Articulate clear benefits from the partner's perspective. Respect partners' other commitments and competing priorities. Seek input rather than dictate

approaches. Remember: partners are independent businesses, not extensions of your sales force.

Pitfall 2: Focusing Exclusively on Transactions

This appears as only contacting partners when you need something, measuring success solely by revenue numbers, or failing to invest in relationship building between transactions. Avoid this by maintaining regular contact regardless of immediate business needs. Share valuable insights and information proactively. Celebrate partner successes even when you're not directly involved. Invest time in understanding partners' broader business challenges. Build relationships, not just transactions.

Pitfall 3: Overpromising and Underdelivering

This happens when making commitments you can't keep to win deals, setting unrealistic expectations about support or results, or promising features or capabilities that don't exist. Avoid this by being transparent about what you can and cannot deliver. Set conservative timelines and beat them rather than miss aggressive ones. Clearly communicate limitations or constraints upfront. Follow through on every commitment, no matter how small. Your credibility is your currency—protect it fiercely.

Pitfall 4: Neglecting the Human Element

This shows up as treating relationships as purely professional exchanges, failing to understand partners' personal motivations and concerns, or ignoring the emotional aspects of partnership. Avoid this by taking genuine interest in partners as people, not just business contacts. Remember personal details and follow up on them. Celebrate milestones and achievements in partners' personal lives. Show empathy during challenging times. Business relationships are still human relationships.

Pitfall 5: Failing to Adapt to Change

This manifests as continuing strategies that are no longer working, ignoring market shifts or competitive threats, or maintaining rigid approaches despite changing partner needs. Avoid this by regularly reassessing your strategies and tactics. Stay informed about industry trends and market changes. Actively seek feedback from partners on what's working and what isn't. Be willing to experiment with new approaches. Adaptability is a competitive advantage.

Pitfall 6: Inconsistent Engagement

This appears as intensive engagement during onboarding or deals followed by radio silence, sporadic communication with long gaps, or varying levels of attention based on your internal pressures. Avoid this by establishing and maintaining predictable communication rhythms. Use calendar reminders to ensure regular touchpoints. Communicate proactively even during slow periods. Ensure partners never have to chase you for information or support. Consistency builds trust; inconsistency destroys it.

The Path Forward

Building Share of Heart relationships requires deliberate effort and sustained commitment. It means investing time in deep discovery to truly understand your partners. It demands consistency in how you show up, reliability in how you deliver, and

authenticity in how you engage. It requires you to add value beyond products, celebrate successes generously, solve problems collaboratively, and adapt continuously to changing circumstances.

Most importantly, it requires you to avoid the common pitfalls that undermine partnerships: treating partners like employees, focusing only on transactions, overpromising and underdelivering, neglecting the human element, failing to adapt to change, and engaging inconsistently. Each of these mistakes erodes influence and pushes partners toward competitors who get these fundamentals right.

The rewards for getting this right are substantial. Partners who trust you, believe in your mission, and see clear alignment between your success and theirs become your most powerful sales force. They proactively bring you opportunities, invest time in learning your solutions, prioritize your products over alternatives, and advocate for your success in ways that direct sales alone never could.

In our final article, we'll explore how to operationalize these principles through strategic account planning. You'll learn how to document your understanding, track progress, measure relationship health, and create actionable quarterly plans that transform good intentions into measurable results. The foundation is built—now it's time to create the systems that sustain it.