Building Share of Heart Relationships in Channel Sales

John C Fernandez a-2-mp.com

Winning Through Influence

A Strategic Guide to Maximizing Indirect Sales Through Goals, Roles, and Market Demand Alignment

Introduction: The Power of Influence Over Authority

In the world of indirect and channel sales, a fundamental truth shapes every interaction: you have no formal authority over your partners. Unlike direct sales teams where managers can direct their reports, channel sales professionals must build their success on something far more powerful and enduring—influence.

"I wish I didn't have so many people selling WITH me." - said no sales rep ever

This guide is built on a simple but profound principle: Share of Heart relationships—where partners actively champion your products and solutions—are created through influence, not authority. And influence is built by aligning three critical elements: Goals, Roles, and Market Demand.

As Simon Sinek famously said, "People don't buy WHAT you do, they buy WHY you do it." This same principle applies to channel relationships. Partners don't sell your products because you tell them to; they sell your products when they understand and believe in your mission, when their goals align with yours, when their role in the market is strengthened by your partnership, and when together you can capture market demand.

Who This Guide Is For

This ebook and accompanying account planning document are designed for:

- Channel sales managers and directors building partner networks
- Strategic relationship managers working with key partners
- Business development professionals in indirect sales channels
- Anyone seeking to transform transactional partnerships into strategic, high-value relationships

Whether you're managing dental distributors, technology resellers, or any other channel partner network, the principles in this guide will help you build the kind of relationships where partners actively promote and sell your solutions.

Chapter 1: Understanding the Channel Sales Challenge

The Unique Complexity of Indirect Sales

Channel sales presents unique challenges that distinguish it from direct sales. Understanding these challenges is the first step toward mastering influence-based relationships.

You're Selling to Salespeople

Your primary customer is a sales professional who understands every technique, strategy, and tactic in your playbook. They've heard every pitch, seen every demonstration, and evaluated countless solutions. This means:

- You cannot rely on traditional sales techniques alone
- Authenticity and substance matter more than polish
- Your partners evaluate you as critically as they evaluate your products
- Building credibility requires consistent demonstration of value

No Formal Authority

Unlike managing a direct sales team, you cannot simply direct your partners to prioritize your products. You have no formal authority over their time, focus, or selling activities. This constraint forces you to develop influence—a far more powerful and sustainable approach.

"People work harder for their reasons than yours." - David Mattson

This quote captures the essence of channel sales success. You must help partners discover their own compelling reasons to prioritize your solutions. When partners work from their own motivation rather than external pressure, their commitment and results multiply.

Relationships Are Complex

Channel partnerships involve multiple stakeholders, conflicting priorities, and competing vendor relationships. Your partners:

- Represent dozens or hundreds of brands and products
- Face competing demands from multiple vendors seeking mindshare
- Balance short-term quotas with long-term customer relationships
- Must justify every recommendation to their own customers

Strategic and Tactical Demands

Successful channel relationships require excellence at both strategic and tactical levels. You must:

- Think strategically about market positioning, partner capabilities, and competitive landscape
- Execute tactically with responsive support, training, and deal assistance
- Balance long-term relationship building with quarterly revenue targets
- Adapt quickly to market changes and competitive threats

You Must Always Be On Your Game

In direct sales, one mediocre interaction rarely destroys a customer relationship. In channel sales, your credibility with partners is constantly being evaluated. Every interaction—whether it's a joint customer call, a product training, or a casual conversation—either builds or erodes your influence.

Partners watch how you handle challenges, respond to questions, support deals, and represent your company. They notice when you're prepared versus when you're winging it. They evaluate whether you understand their business and respect their expertise. Consistency in professionalism and value delivery is essential.

Chapter 2: The Share of Heart Framework

Share of Heart goes beyond Share of Wallet. It represents the level of partnership where your channel partners actively champion your solutions, proactively bring you opportunities, and advocate for your products even when easier alternatives exist. This chapter introduces the three-pillar framework that creates these transformational relationships.

The Three Pillars: Goals, Roles, and Market Demand

Share of Heart relationships are built on the alignment of three fundamental elements. When these three elements align, partners naturally prioritize your solutions because doing so advances their own success.

Winning Through Influence

Pillar 1: Goals Alignment

Goals alignment means understanding what your partners are trying to achieve and showing them how your partnership helps them get there. This goes far beyond revenue targets.

Understanding Partner Goals:

- Business growth objectives (revenue, market share, profitability)
- Strategic priorities (new market segments, service expansion, competitive positioning)
- Operational goals (efficiency, customer satisfaction, retention rates)
- Individual motivations of key stakeholders (career advancement, recognition, expertise development)

Creating Goal Alignment:

- Articulate how your products help partners achieve their specific objectives
- Provide data and case studies that demonstrate outcome achievement
- Design programs and incentives that support partner priorities
- Regularly review and adjust strategies as partner goals evolve

Pillar 2: Roles Definition

Roles definition clarifies what each party contributes to the partnership and how these contributions create mutual value. Clear roles eliminate confusion, reduce friction, and maximize efficiency.

Defining Your Role:

- Product expertise and technical support
- Marketing resources and lead generation support
- Training and enablement programs
- Deal support and competitive intelligence
- Strategic planning and market insights

Clarifying Partner Roles:

- Customer relationship management and local market presence
- Solution selling and needs assessment
- Implementation and ongoing customer support
- Market feedback and competitive intelligence sharing
- Portfolio management across multiple vendor relationships

The key is ensuring that roles are complementary, not competitive. When roles are clearly defined, both parties can excel in their respective areas while supporting each other's success.

Pillar 3: Market Demand Capture

Market demand alignment ensures that your joint efforts target real, addressable opportunities. Even with perfect goal and role alignment, partnerships fail if they pursue non-existent markets or miss emerging opportunities.

Understanding Market Demand:

- Current customer pain points and unmet needs
- Emerging market trends and technology shifts
- Competitive landscape and differentiation opportunities
- Economic and regulatory factors affecting purchase decisions
- Geographic and vertical market variations

Collaborating on Demand Capture:

- Share market intelligence and customer insights
- Co-develop go-to-market strategies for specific segments
- Align messaging and positioning for maximum market impact
- Create joint value propositions that resonate with target customers
- Monitor and adjust strategies based on market response

The Virtuous Cycle

When Goals, Roles, and Market Demand align, they create a self-reinforcing cycle. Success in capturing market demand helps partners achieve their goals, which validates the effectiveness of your defined roles, which motivates both parties to pursue even more market opportunities. This virtuous cycle is the hallmark of Share of Heart relationships.

Partners in this cycle don't need to be convinced to prioritize your products. They do so naturally because every success reinforces the value of the partnership and creates momentum for more success.

Chapter 3: Building Influence Through 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. This chapter provides a framework for conducting discovery that builds both knowledge and relationship.

The Influence Approach to Partner Discovery

Traditional discovery focuses on gathering information. Challenger-style discovery goes further—it challenges partners to think differently about their business, their customers, and their opportunities. This approach positions you as a strategic advisor, not just another vendor.

Essential Discovery Questions

Understanding Product Evaluation Process:

- 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?

Understanding Relationship Building:

- 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 Introduction Strategy:

- 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?

Understanding Challenges:

- 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?

Understanding Current Environment:

- What are your customers looking for in products or processes in the current business environment?
- How have customer priorities shifted in recent months?

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 in channel partnerships 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
- Taking detailed notes for future reference and follow-up

From Discovery to Insight

The real value of discovery comes from transforming information into insights. After each discovery conversation, take time to:

- 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

Document these insights in your account planning process, which we'll explore in detail later in this guide.

Chapter 4: Strategies for Sustained Influence

Building influence is one thing; sustaining it over time is another. This chapter explores the ongoing strategies and behaviors that maintain and deepen your influence with channel partners.

Consistency and Reliability

Nothing builds influence faster than being consistently reliable. In channel partnerships, this means:

- Following through on every commitment, no matter how small
- Responding promptly to partner requests and questions
- Maintaining consistent communication rhythms (weekly check-ins, monthly reviews, quarterly planning)
- Being honest when you don't know something rather than making up answers
- Admitting mistakes quickly and fixing 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 to your partners' businesses 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

Winning Through Influence

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 (awards, rankings, executive visibility)

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

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
- Strengthen personal relationships across both organizations

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
- Investing in your own professional development

Chapter 5: The Account Planning Process

Strategic account planning transforms good intentions into disciplined execution. This chapter introduces the account planning framework that accompanies this ebook, showing you how to systematically apply the Share of Heart principles to each partner relationship.

Purpose of Account Planning

Effective account planning serves multiple critical functions:

- Documents your understanding of each partner's business, goals, and situation
- Creates a strategic roadmap for building and deepening the relationship
- Identifies specific actions and initiatives to drive results
- Provides a framework for measuring progress and adapting strategies
- Enables knowledge transfer within your organization
- Facilitates strategic discussions with your leadership

Key Components of the Account Plan

The accompanying account planning template includes the following sections, each designed to capture critical information and drive strategic thinking:

Winning Through Influence

1. Partner Profile and Overview

This section captures fundamental information about the partner:

- Company name, locations, and size
- Key stakeholders and decision makers
- Current partnership status and tenure
- Market segments and customer base
- Competitive positioning and market share

2. Goals Analysis

Document the partner's goals at multiple levels:

- Corporate strategic objectives
- Business unit or division goals
- Individual stakeholder motivations
- How your partnership can help achieve these goals
- Metrics for measuring goal achievement

3. Roles and Responsibilities Matrix

Create clear delineation of roles:

- What you will provide and deliver
- What the partner will provide and deliver
- Joint activities and shared responsibilities
- Communication protocols and escalation paths
- Review and optimization mechanisms

4. Market Demand Assessment

Analyze the market opportunity:

- Target customer segments and their needs
- Market size and growth trends
- Competitive landscape and positioning
- Barriers to adoption and strategies to overcome them
- Emerging opportunities and threats

5. Opportunity Pipeline

Track specific opportunities:

- Active deals and their status
- Qualified prospects in various stages
- Strategic initiatives with long-term potential
- Resources required and support provided
- Projected close dates and revenue

6. Relationship Health Score

Assess the current state of influence:

- Strength of relationships with key stakeholders
- Partner satisfaction and engagement level
- Share of mindshare relative to competitors
- Recent wins and challenges
- Trajectory (improving, stable, declining)

7. Strategic Initiatives and Action Plan

Define specific actions:

- Key initiatives for the next quarter
- Specific actions with owners and deadlines
- Resource requirements and budget
- Success metrics and tracking mechanisms
- Risk assessment and mitigation strategies

Using the Account Plan Effectively

An account plan is a living document, not a one-time exercise. To maximize its value:

- Review and update it monthly or after significant events
- Share relevant sections with partners to validate your understanding
- Use it to prepare for strategic business reviews
- Reference it when requesting internal resources or support
- Track patterns across multiple account plans to identify systemic opportunities

Chapter 6: Common Pitfalls and How to Avoid Them

Even with the best intentions and strategies, channel relationships can falter. This chapter identifies common mistakes and provides guidance for avoiding them.

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.

How to avoid it:

- Always frame asks as opportunities, not obligations
- Articulate clear benefits from the partner's perspective
- Respect partners' other commitments and competing priorities
- Seek input rather than dictate approaches

Pitfall 2: Focusing Exclusively on Transactions

This manifests as: Only contacting partners when you need something, measuring success solely by revenue numbers, or failing to invest in relationship building between transactions.

How to avoid it:

- Maintain 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

Pitfall 3: Overpromising and Underdelivering

This manifests as: 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.

How to avoid it:

- Be 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

Pitfall 4: Neglecting the Human Element

This manifests as: Treating relationships as purely professional exchanges, failing to understand partners' personal motivations and concerns, or ignoring the emotional aspects of partnership.

How to avoid it:

- Take 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

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.

How to avoid it:

- Regularly reassess 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

Pitfall 6: Inconsistent Engagement

This manifests 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.

How to avoid it:

- Establish and maintain 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

Conclusion: The Journey to Share of Heart

Building Share of Heart relationships in channel sales is not a destination but a continuous journey. It requires commitment, consistency, and genuine care for your partners' success. The principles and practices outlined in this guide provide a roadmap, but the real work happens in daily interactions and sustained effort over time.

Key Takeaways

- Influence, not authority, is the foundation of successful channel relationships
- Goals, Roles, and Market Demand must align to create self-reinforcing partnerships
- Deep discovery and active listening build understanding and trust
- Consistency and reliability are essential for sustained influence
- Strategic account planning transforms principles into disciplined action
- Value creation extends beyond immediate product transactions
- Continuous adaptation keeps partnerships relevant and productive

Moving Forward

As you apply these principles to your channel partnerships:

1. Start with your most strategic partners. Apply the account planning framework thoroughly to understand their goals, define clear roles, and assess market opportunities.
2. Invest time in discovery conversations. Use the Influence questions to deepen your understanding and position yourself as a strategic advisor.
3. Create consistent engagement rhythms. Establish regular touchpoints, strategic reviews, and celebration moments.
4. Focus on value beyond products. Look for opportunities to help partners succeed in ways that transcend your immediate commercial interests.
5. Measure what matters. Track not just revenue but relationship health, partner engagement, and share of mindshare.
6. Learn continuously. Regularly seek feedback, assess what's working, and adapt your approaches.

Final Thoughts

"People don't buy WHAT you do, they buy WHY you do it." - Simon Sinek

This principle that opened this guide deserves repeating at its close. Your partners will champion your products when they believe in your mission, when they see how your partnership advances their goals, and when together you capture market opportunities that benefit their customers.

Share of Heart relationships are not built through manipulation or transaction-focused tactics. They emerge from genuine alignment of interests, consistent demonstration of value, and authentic care for partner success. When you get this right, you create partnerships that weather challenges, adapt to change, and generate sustained mutual success.

The journey requires patience, discipline, and commitment. But the results—partners who actively sell your solutions, bring you into opportunities, and advocate for your success—make the investment worthwhile.

Use this guide and the accompanying account planning document as your roadmap. Apply the principles consistently, adapt them to your specific situation, and measure your progress over time. Most importantly, remember that you're building relationships with people who have their own goals, challenges, and motivations. When you help them succeed, they'll help you succeed.

Here's to your success in building Share of Heart relationships.

Recommended Resources

To deepen your understanding of channel sales and relationship building, consider these valuable resources:

Books

- Power Relationships by Andrew Sobel & Jerold Panas - Essential reading on building strategic business relationships
- Making Channel Sales Work by Marcus Cauchi & David Davies - Comprehensive guide to channel partnership success
- Start with Why by Simon Sinek - Understanding the power of purpose in business relationships

Next Steps

Refer to the accompanying Account Planning Document to begin applying these principles to your strategic partner relationships. The planning document provides a structured framework for:

- Documenting partner profiles and situations
- Analyzing goals, roles, and market demand
- Tracking opportunities and initiatives
- Measuring relationship health
- Creating actionable quarterly plans

Use the planning document as a living tool that evolves with your partnerships and guides your strategic decisions.