The Distributor/Marketing Channel Partner Evaluation & Selection Rating Matrix is an Excel-based spreadsheet that evaluates up to 10 actual or potential partners. Up to 28 factors or criteria can be used in the evaluation process. A Partner Comparison Chart is calculated for each factor/criteria. A drop down list allows any individual factor/criteria to be readily selected for the chart. A Partner Profile Chart is calculated for each Partner.
MARKETING DISTRIBUTION CHANNEL PARTNERS EVALUATION & SELECTION MATRIX USER GUIDE

Excel spreadsheet

INTRODUCTION

In all sales and customer interaction situations there is a list of operational activities that must be carried out, either by you or your partner. Analysis of these activities, to identify the ones that you look to your partner to execute, helps to profile the type of partner best suited to your needs, e.g. if you only wish to have the partner identify new sales opportunities, a sales agent is probably the most appropriate type of partner, while if you wish to have the partner provide services throughout the full sales cycle and also provide in-market after sales customer support, a suitable partner is more likely to have a Value Added Reseller (VAR) type profile.

Other more strategic factors, such as Market Knowledge, Access to a Partner's customer base, technical skills, after sales support infrastructure and financial resources may also form part of the evaluation. The Partner Evaluation & Selection Rating Matrix allows one to specify a range of criteria and their relative importance and to compare upto 10 Partners on this basis.

The Partner Selection Rating Matrix can be used to evaluation and compare existing channel partners or alternatively to select a new partner for a list of potential partners.
**USER INSTRUCTIONS**

The EXCEL model has a simple Push Button Menu system at the top of the Workbook in cell B2 to C2.

The following general guidelines should be followed.

- Cells in Green are intended for User Input.
- Cells in Black are calculated and should not be altered by the user.

On first use it is recommended that the Menu Options be used in the sequence in which they are numbered, 1, 2, 3, etc. On subsequent use the options can be selected as required to make amendments to the data originally entered. It may be useful to print out, for reference, the various input forms.

Enter the **Partners' Names**. These are the Actual or Potential Partners for which rating data is to be entered. (see chart above)
Enter the **Partner Selection Evaluation Criteria** and **Importance**. (see chart above)

These are the factors/service components on which potential partners will be rated and evaluated. The relative Importance of each Factor should be entered on a scale of 1 to 5.

A 1 indicates that the Factor is on little importance in the evaluation, while a 5 indicates a Factor that is considered to be extremely important in evaluating/selecting a Partner.

Where a Factor is not applicable a zero may be entered. The data can be entered with one decimal, thus one can have a Relative Importance of, say, 3.5

Enter **Partners' Rating** Data. For each factor/service component to be used in the evaluation the perceived strength/competence of each Actual or Potential Partner should be entered on a scale of 1 to 5.

**Rating** of the Actual/Potential Partner for each attribute:

1. *Very Weak*
2. *Less than Average*
3. *Average*
4. *Somewhat better that average*
5. *Significantly better than average*

When the data is entered, an **Adjusted Rating** is calculated by multiplying the **Rating** of a factor by the **Importance** of that factor. The maximum Adjusted Rating is 25, i.e. 5 by 5.

The different charts are automatically created. The **Partner Profile Chart** has a dropdown list on the top left-hand corner of the chart to select the Partner to be displayed in the chart. The **Partner Name** is automatically displayed in the Title Area of the chart.
The **Partner Comparison Chart** has a dropdown list on the top left-hand corner of the chart to select the **Factor** to be displayed in the chart.

The **Adjusted Ratings** for each of the 10 Potential Partners for the chosen factor is displayed in the chart.
Partner Comparison Chart