

# ***Partner Selection Rating Matrix User Guide***

## ***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 up to 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 cells B2 & C2. (see page 4) 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.

Enter the **Partners' Names**. (see page 4) These are the Actual or Potential Partners for which rating data is to be entered

Enter the Partner **Selection Evaluation Criteria and Importance**. (see page 5) 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**. (see page 6) 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. A 1 indicates extremely weak, while a 5 indicates extremely strong for that particular factor. The data can be entered with one decimal, thus one can have a rating of, say, 3.5.

**Importance of Evaluation Criteria** in the selection process

0 Not applicable

1 Not important

2 Minor importance

3 Important

4 Very important

5 Essential

Rating of the Actual/Potential Partner for each attribute:

1 Very Weak

2 Less than Average

3 Average

4 Somewhat better than 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** (see page 8) 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** (see page 7) 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 Selection Rating Matrix

1. Enter Potential Partners' Names

2. Enter Evaluation Criteria & Importance

3. Enter Potential Partners' Ratings

4. Go to Potential Partner Profile Chart

5. Go to Partner Comparison Chart

6. Print Potential Partner Ratings

© Copyright MarketWare International 2001-2005

### Partners Names

**Big Co. Ltd**

**Fast Growth Inc**

**ABC plc.**

**XYZ plc**

**Another XYZ Ltd**

**Faster Growth SA**

**Vertical Specialist Ltd**

**Big Multinational plc**

**ABC Again plc.**

**ABC High Street plc.**

## Selection Evaluation Criteria

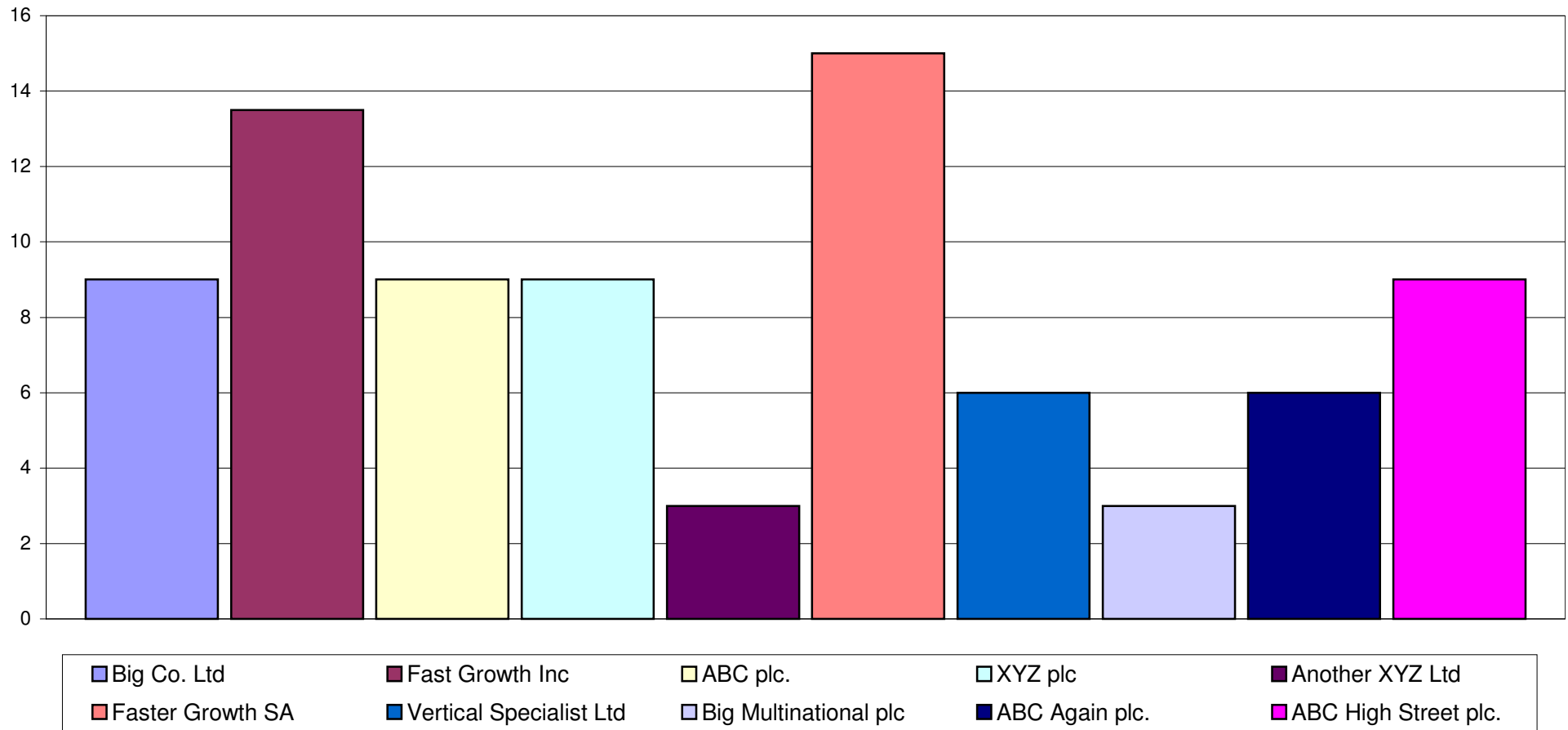
	Importance	Big Co. Ltd		Fast Growth Inc		ABC plc		XYZ plc	
		Rating	Adjusted Rating	Rating	Adjusted Rating	Rating	Adjusted Rating	Rating	Adjusted Rating
Local Market Presence	3.5	1.0	3.5	1.5	5.3	2.0	7.0	2.5	8.8
Localise Marketing Materials & Campaigns	0	4.0	0.0	3.0	0.0	4.0	0.0	2.0	0.0
Create Awareness	3	3.0	9.0	4.5	13.5	3.0	9.0	3.0	9.0
Generating Demand	4	4.0	16.0	3.0	12.0	4.0	16.0	1.5	6.0
Prospecting	4	5.0	20.0	3.0	12.0	4.5	18.0	2.0	8.0
Lead Qualification	5	5.0	22.5	4.0	18.0	3.0	13.5	2.5	11.3
Respond to RFP	4	3.0	12.0	4.0	16.0	3.0	12.0	3.0	12.0
Product Demonstration	3	5.0	15.0	4.5	13.5	3.0	9.0	3.0	9.0
Closing Sale	4	3.0	12.0	4.0	16.0	4.0	16.0	2.5	10.0
Customer Training	2	4.0	8.0	3.0	6.0	4.0	8.0	2.0	4.0
Project Management	2	4.5	9.0	4.0	8.0	3.0	6.0	2.5	5.0
Customisation	2	4.5	9.0	4.0	8.0	3.0	6.0	2.5	5.0
Installation & Commissioning	2	5.0	10.0	4.0	8.0	4.0	8.0	1.0	2.0
Systems Integration	2	4.5	9.0	4.0	8.0	3.0	6.0	2.5	5.0
Invoicing & Debt Collection	2	3.0	6.0	4.5	9.0	3.0	6.0	3.0	6.0

After Sales Support	2	4.5	9.0	3.0	6.0	4.5	9.0	2.0	4.0
Warranty Support	2	2.0	4.0	3.0	6.0	4.0	8.0	1.5	3.0
Maintenance Services	2	2.0	4.0	3.0	6.0	4.0	8.0	1.5	3.0
Upgrade & Reference Selling	2	2.0	4.0	3.0	6.0	4.0	8.0	1.5	3.0
Market Knowledge	2	5.0	10.0	3.0	6.0	3.0	6.0	3.0	6.0
Technical Expertise	2	4.0	8.0	3.0	6.0	4.0	8.0	2.0	4.0
Sales & Marketing Skills	2	4.0	8.0	3.0	6.0	4.0	8.0	2.0	4.0
Access to Large Customer Base	2	4.0	8.0	3.0	6.0	4.0	8.0	2.0	4.0
Scale of Operation & Infrastructure	2	2.0	4.0	3.0	6.0	4.0	8.0	1.5	3.0
Supplier of Complementary Products	2	4.0	8.0	4.5	9.0	3.0	6.0	4.0	8.0
Inventory Holding and Distribution Logistics	2	4.5	9.0	3.0	6.0	4.5	9.0	2.0	4.0
Other 1	2	4.5	9.0	3.0	6.0	4.5	9.0	2.0	4.0
Other 2	5	5.0	25.0	4.5	22.5	3.0	15.0	3.0	15.0

# Partner Comparison Chart

Create Awareness ▼

Create Awareness





Rating  
Adjusted Rating

