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可以预言，21世纪前10年后半部分的主旋律将是：不向美国和欧洲企业出口，直接买下它们！

——约翰·卡斯林

# 成功地玩转分销网络

## Well Managing Distribution Channels

今天,企业必须面对各种严峻的现实和挑战,供应商经常发现:企业通过分销商将产品推向市场的过程实在太差强人意,不但浪费不少,而且效率低下  
*Enterprises must be ready to embrace harsh challenges. Suppliers often find that it costs much and has low efficiency to sell goods through distribution channels.*

**我**们不通过分销商来做营销,而由自己直接操作。

这是许多供应商的观点,当企业(供应商)通过国外分销商在当地市场上销售产品时,上述观点更是屡见不鲜。

其实,正确的认知应该是:当企业的许多工作能赢得分销商的参与和支持时,它可以在全球范围内与其分销商建立更为紧密的伙伴关系。

今天,企业必须面对各种严峻的现实和挑战,供应商经常发现:企业通过分销商来将产品推向市场的过程实在太差强人意,不但浪费不少,而且效率低下。

让我们来看看中国企业通过建立分销网络拓展国外市场的成功案例,也许可以有所获益。

### 美的集团

美的集团是中国最大的家电厂商之一,其海外销售额在2002年就达到了3.3亿美元,约占“美的”在全球100多个国家和地区销售总收入的27%左右。由于在劳动力、成本及政策等方面具有优势,“美的”视珠江三角洲为最理想的家电制造基地。在20世纪90年代中期,美的曾计划在越南设厂生产风扇,但根据对当地市场环境的反复分析和权衡,“美的”最终还是放弃了该计划,因为越南除了劳动力成本较低外,其生产能力和制造成本与中国相比均不具有优势。

然而,“美的”2/3的产品是以贴牌方式进入海外市场。研究发现,避免直接在海外设厂的同时,“美的”一直致力于改进海外分销渠道。

从事批发业务的大型进口商、零售商及自身的大型制造基地构成了“美的”海外分销管理的重要环节。“美的”的分销渠道较为单一,

主要通过当地市场的进口商和零售商来进行销售。例如,欧洲进口商从中国进口“美的”产品后直接通过零售商来分销(分销结构比较简单),像沃尔玛和凯马特这样的美国大型零售商为“美的”贡献的收入占“美的”在美国市场销售总收入的80%左右。

“美的”的分销战略使其产品能够以较低的价格进入当地的主流渠道。到目前为止,美的已经成为20多个全球零售巨头的产品供应商,这些巨头包括西尔斯、家庭百货(Home-Depot)、凯马特等(这些零售商在让“美的”供货的同时也向世界其他10大家电品牌采购并销售贴牌的产品)。

“美的”的分销策略使其能够与全球众多知名企业建立起广泛的分销网络。

“美的”的做法表明:企业在进入某个新市场时需要制定正确的出口战略,这一点非常重要;此外,企业还需要对当地市场有很好的理解和把握。

### 上海广电数码科技有限公司

上海广电数码科技有限公司已经由传统的彩电制造商转型为当今领先的等离子电视、液晶显示器、背投电视等高端电子产品制造产业集团,其年营业额高达约40亿美元。下面,我将向大家介绍“上广电”是如何利用独特的分销渠道策略进入并打开美国市场的。

在刚进入美国市场时,“上广电”作出了一系列重要决策。

首先,公司决定仰仗像Ingram Micro、D&H Distributing这样能提供促销和服务的分销商来共同开拓美国市场。通过与这些经销商的合作,“上广电”逐步了解了美国市场并把

握了许多市场机会。尽管“上广电”通过当地的零销商(如沃尔玛和Best Buy等)来直接销售,但它逐步发现,这些零售商往往无法满足“上广电”在物流、服务、促销等方面的要求。

之后,“上广电”决定与这些分销商合作在各行各业市场上进行促销。与动辄花费上千万美元来建立品牌知名度的做法不同,“上广电”的做法是广泛参加各种行业会议。美国的分销商们很喜欢与“上广电”打交道,因为“上广电”使他们能够以较低的成本为客户提供产品,对于必须与沃尔玛这类巨头竞争的中、小型电子产品零售商而言,上述优势很有价值。

最后,“上广电”决定避开低端彩电市场,以免与其他以贴牌方式进入美国市场的中国彩电厂商产生激烈的竞争。公司最终决定主要向美国市场提供液晶电视、PDP电视等高端视听产品电子产品,这个领域的竞争相对还不算太激烈。“上广电”把产品的价格订得比日本与韩国的竞争对手的同类产品低,但比靠低价抢市场的厂商高。此外,“上广电”还通过亚马逊网站(Amazon.com)、BJS批发俱乐部、Buy.com、Costco、Office Depot等网上渠道来销售产品,这也是一种有效的销售渠道。

注意去了解当地市场,并据此制定合适的渠道策略!这对将要进入新市场的企业来说非常关键。

尽管渠道建立与管理的流程并不复杂,但必须真正在实际工作中加以注意和运用。只有这样,企业才能真正找到合适的渠道伙伴或分销商,并借助于渠道伙伴在当地市场上建立品牌、展示产品、提供服务。如果企业在渠道伙伴的选择上出现失误,企业在市场上将难逃败局。

撰文/约翰·卡斯林

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## **Expression Magazine: Caslione's Marketing**

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### **“Developing & Managing Successful Distributor Channels”**

We don't market through distributors, we market despite them." I hear this stated by too many companies, especially when a supplier (manufacturer) does business outside of his home country with a foreign distributor. While it always requires a lot of work to do business with distributors, a supplier can have very successful relationships with distributors all around the world.

We must also live in the reality of today, especially as profit margins are always under pressure. Very often, suppliers find the process of going to market with distribution partners a wasteful and ineffective experience.

Here is what suppliers need to do to market and sell successful with and through distribution channels here in China and around the world:

#### **1. Get Your Strategy Correct First – Plan, Plan and Plan!**

Most suppliers run distribution channels tactically, with the objective of achieving this quarter's or this year's sales targets. This approach inherently undermines any chance of achieving any *real* long-term success.

As I have developed marketing, sales and distribution strategies in almost 90 countries in the world, I have come to realize that virtually all companies work

with channel partners is based on an unspoken history or experiences – both positive and negative experiences. Very few businesses and their managers have actually taken the time to truly think through the process properly.

## **2. Leverage Your Strengths / Overcome Your Weaknesses**

When strategizing, it is critical to remember your heritage and your current strengths, rather than simply looking to the future. Remember what business you are in and stay with it. Also, understand where your company needs help – and find the right partner(s) and develop a cooperation agreement(s) to secure that part of your business.

## **3. Manage the Process to Go to Market**

Failure to effectively manage go-to-market processes destroys many channel marketing initiatives. This happens especially when strategy has not been properly thought through and insufficiently planned: What we instead see is channel marketing that drifts off into day-to-day tactical programs. More problematic is when internally our own people become looked into only the perspectives of their own departmental silos.

Too often, our internal departments operate independently. Planning, marketing communications, product marketing and channel marketing all have to be co-coordinated. If they are not, then the supplier fails to achieve the full benefits of working with an extended business network.

## **4. Develop Clearly Defined Roles for You and Your Channel Partners**

It is absolutely essential to integrate both the supplier and the channel partners' roles in the process to go to market successfully. This means having a very clear understanding of your channel partners' business models, the economics of their businesses and what impact these will have on their ability and motivation to fulfill their roles in your extended business network – especially if it is international or global.

### **5. Act Appropriately to Your Channel Partners' Business Models**

The most successful suppliers vary how it behaves according to the business models employed by each of the channel partners it chooses – as part of the overall strategy *and* assuming that the supplier has selected the proper channel partners.

What many suppliers fail to realize is that channel partners are essential categorized in one of three ways:

- **Sell-Through:** The supplier is the customer and the supplier uses its brand strength to pull in the distributor simply fulfills the sale, delivers and services the products, etc. The customer relationship is owned by the supplier and your marketing should be focused on the end-user customer or consumer.
- **Sell-With:** The distributor is in the market creating demand for the supplier and the supplier works closely with the channel partner to develop the relationship. Ownership of the customer relationship is typically shared to varying degrees between both the supplier and

the distributor. In this model, your marketing should be focused on the end-user customer or consumer primarily, and also on the distributor to the extent that it may be needed to keep him focused.

- **Sell-To:** Suppliers sell products to independent third parties. The distributor usually owns the customer relationship and there is no real partnership. In this model, the supplier's primary task is to gain "share of mind" of the distributor to persuade him to sell your company's product, rather than a competitor's. In this model, your marketing should be focused on the distributor and not on the end-user customer or consumer.

It is essential that the supplier knows the precise roles he should play to maximize success for both supplier and channel partner within each of his distributor's business model. It should never be forgotten that the supplier in most situations is one of a number of suppliers vying for time and attention with the same channel partners. It is for this reason that a supplier must be very careful to fully develop its customized Total Value Proposition™ appropriate to each of its channel partners.

Finally, it is vital to understand how the channel partner measures his own performance and what success he strives to achieve, e.g., increasing overall sales levels, increased profitability, predetermined return on investment, etc. Channel partner behavior varies dramatically according to the key performance indicators used by each individual channel.

## **6. Fully Understand and Plan for Your Channel Partners' Benefits**

Too often new channel programs are launched or existing channel programs are changed without proper consultation with channel partners. The most successful suppliers know that their channel partners' input is absolutely critical to everything that the supplier does.

Suppliers must also consider the financial impact of every program that is co-funded with its partners, including addressing critical questions addressing levels of the supplier's and his channel partners investments, their individual and collective breakeven points, assessment of the long-term results, etc.

By building close cooperation with its channel partners, suppliers are able to implement complete closed loop marketing – meaning that the supplier knows the precise return generated from all the inquiries from a particular marketing investment, e.g., an advertisement, direct mail initiative, special promotion, etc.

This is all constructed upon a supplier-initiated framework of regular meetings with channels partners, all of whom have yearly business plans and quarterly marketing plans.

## **7. Build the Right Channel Marketing Strategy From the Very Start**

It is not very common to have the ability to build a new channel strategy from the ground up. But even if the supplier has existing channel partners, either inherited from a departing manager of a department or from the acquisition of a new company, construct an "ideal" channel strategy as if no extended business network existed today, is a very worthwhile exercise for all suppliers.

Once a supplier feels like it has a reasonably good grasp of the situation in the marketplace, it is necessary to embark upon the following 11-step process leading firms use to recruit and select a channel partner or distributor. The goal in this process is to establish a relationship which is forthright, mutually beneficial, and built upon a strong foundation. Moreover, the key theme that permeates the eleven step process is to quickly and solidly establish the supplier on an 'equal footing' with the distributor so to preempt any deception or "gamesmanship" being applied by the distributor to establish control of the relationship with the supplier. Although some of the steps may appear less relevant than others in light of a given situation, the proper application of these comprehensive steps will minimize the likelihood of choosing the wrong distributor.

Before starting the process, it is important to note that the first three steps need to take place prior to ever speaking with or meeting with a prospective distributor. The ability to perform these crucial functions can be greatly enhanced by third-party advocate described earlier. Throughout this entire procedure, and especially in the initial stages, discretion and low visibility should direct the supplier's actions. Remember, the very nature of today's intense channel margin competition dictates that relatively few distributors are truly looking out for a supplier's best interests unless the supplier can quickly and convincingly



establish itself as one that truly understands both the market itself *and* how to work with distributors in that market.

Here is how the 11-step process works best:

### **STEP 1: Identify All Existing & Potential End-Users / Customers**

For entering any new market – emerging or industrialized – leading suppliers in their industries routinely develop a profile of potential and existing end-user customers / consumers, and create a database for each.

### **STEP 2: Perform a Customer or End-User / Consumer Survey**

This needs to be done by either someone in the supplier's company, a trusted associate in the local market, or the home country's local consulate – but not by a potential channel partner or distributor. The key is to keep it objective. Start with the end-user customer and the experience that they want. This involves understanding how the supplier's products are used, how they are purchased and where the products are in the customers' life cycle.

### **STEP 3: Develop Profiles of *Ideal* and *Minimally Acceptable* Distributors**

Before a supplier undertakes the distributor search, it is important for the supplier to decide upon the attributes of an ideal or minimally acceptable distributor – and stick to them. The creation of a methodology that qualifies and quantifies each attribute is the best way to provide an objective perspective for the supplier.

#### **STEP 4: Perform a Survey of Potential Channel Partners, Distributors, Etc.**

Once the potential customers and end-users / consumers have been identified; the supplier must develop and administer a customer and end-user survey.

Further, the 'Ideal' and 'Minimally Acceptable' attributes must be established. All of this is done from a far distance and not communicating with potential channel members so the supplier can receive "unbiased" information about the market.

#### **STEP 5: Interview Prospective Channel Members, Distributors, Etc.**

Having successfully accomplished Steps 1, 2, 3 & 4, a supplier will be much more informed and better prepared than the vast majority of suppliers who are seeking to recruit and select the right channel partners and distributors.

#### **STEP 6: Select Channel Partners for Each Targeted Market, Segment, Etc.**

The supplier next rates all potential distributors against the profiles developed in *Step 3* and immediately eliminate any that do not meet the "Minimal" profiles.

#### **STEP 7: Jointly Develop Marketing & Sales Strategies and Plans, Forecasts**

Enlightened and resourceful suppliers are able to develop a sales forecast in conjunction with their distributors overall company sales plans and forecasts.

### **STEP 8: Negotiate Channel Members' Initial Product Inventory Investment**

It is critical that both supplier and channel members mutually agree upon the level of inventory required to support the sales forecast. Once this amount is agreed upon, the negotiation of commercial issues like pricing, credit, consignment, should be initiated.

### **STEP 9: Jointly Develop a Sales and Service Plan**

This is point where it is necessary for suppliers to work with each channel member and distributor to agree on business goals for the coming year. Verbalize strategies and write them down in ranked order according to priority. Detail tactics that will be employed to implement the sales strategies and negotiate specific clear responsibilities, checkpoints, and contingencies.

### **STEP 10: Conduct Initial Product, Sales and Service Training**

If the distributor's salespeople believe in the supplier's products and services, then the supplier is much more likely to achieve success in the market. Therefore, it is incumbent to properly train the distributor's staff about why they should dedicate their valuable time to selling the supplier's product.

### **STEP 11: Establish a Channel Member / Distributor Identification Program**

Through the first ten steps, the supplier selected and “signed up” its channel partners and distributors. The next step is to inform the market of these newly-established relationships. On the supplier’s letterhead, and signed by its CEO or Managing Director, the supplier writes to each person on the distributor’s mailing list and to all other potential customers within the distributor’s market advising them that the supplier and the distributor have decided to do business together.

### **DISTRIBUTOR MONITORING & CONTROL (DMC) STRATEGY™**

Oddly enough, many suppliers who perceive themselves as channel-centric, fail to do this. Often marketing programs focus entirely on the end-user and ignore the existence of channel partners altogether. Suppliers also typically fail to measure channel profitability properly. Instead, most suppliers measure their channels partners’ performance by their sales levels and their receptiveness to taking dumped inventory at the end of the quarter. However, they should be measured on how profitable they are to sell through, and how much value they add for the customer.

For the vast majority of companies seeking to take advantage of the tremendous opportunities global markets have to offer, a narrow range of distribution strategies that are best-suited to their corporate philosophy; the corporation’s ability to invest in these markets; the amount of control desired; and, the level of acceptable risk must be developed on a market by market basis. Furthermore, the strategies chosen by each company will require each company

to develop appropriate functions and operations to adequately support the strategies chosen.

For example, if a company decides that a key input is a high-level of control over the sales, manufacturing, installation, servicing and/or distribution of their products within a selected distributor's operation, then the appropriate resources must be dedicated to integrate selected key functions of the manufacturer's business into those same functions in the distributor's business, vs. integration of the distributor's functions into the supplier's business. This is a key distinction as the direction of the integration activity tremendously impacts the degree of monitoring and control that the supplier has within the distributor's business.

Such a high degree of monitoring and control is usually only achieved when a supplier's costly direct investment and local in-market operations approach or when a more cost effective indirect management of the distributor's sales, service, or manufacturing departments – otherwise known as the Distributor Monitoring & Control (DMC) Strategy™ which is recommended for the supplier's high-growth and its most strategically important markets.

The vast majority of the time, it is in a supplier's interest to better monitor and control the sales and distribution of its products. For most companies, properly monitoring and controlling critical aspects of a distributor's business rather than 'owing' the local business may be a much better approach to developing business in global markets. This is the basis of the Distributor

Monitoring & Control Strategy (DMC). The DMC approach provides greater leverage and better leads to the appropriate allocation of resources so as to maximize the effectiveness of the relationship. Solid distribution also encourages the development of a more constructive and balanced relationship built upon 'mutual self-interest'. By better monitoring and controlling those activities within the distributor's business that are essential to successful sales and distribution, the distributor is more effectively managing their resources, their own money, staff, and other resources for the supplier's direct benefit as well as their own. This frees up scarce resources that might be better spent someplace else.

### **Chinese Companies Demonstrate Success**

Here are some excellent examples of Chinese companies building successful channel networks in recent years:

**Midea** is one of the largest suppliers of home electronic appliances in China. Its overseas sales revenues reached 330 million US\$ in 2002, making 27% of their total revenues with products sold in more than 100 countries. However, two-thirds of its products enter into most of the overseas markets as original equipment manufacturer (OEM). Midea has been making an effort to improve its overseas distribution channels while avoiding establishing manufacturing factories overseas. It considers the Pearl River Delta the most ideal place for global home electronic appliance manufacturing, due to the advantages provided by labor source, cost, preferential policies, etc. During the

middle of the 90's, Midea planned to open its electronic fan factories in Vietnam, but soon abandoned the project because of to the local market situation. Despite the lower wages Vietnam offered, its production capacity and manufacturing cost were no higher than those in China.

Large wholesale importers; large retailers and large manufacturers are parts of Midea's strategy to manage its overseas distribution in its foreign markets. Its distribution channel is comparatively flat, mostly by means of overseas importers and their local retailers. For instance, in Europe, the importers distribute their products directly to the retailers after importing from China, hence minimizing distribution channels. In the USA, large retailers, such as Wal-Mart and K-Mart, usually take 80% of the entire sales.

This distribution strategy guarantees Midea's products to enter the main stream channel of the local markets at comparatively low cost. Midea has become the supplier for over 20 global retail groups, such as Sears, Home-Depot, and K-Mart, while these retailers provide OEM services to the top 10 world brands of electronic home appliances.

Its distribution strategy also enables Midea to establish a broad global market network with a group of globally recognized companies.

This case illustrates that it is important for a supplier to develop a proper exporting strategy when entering a new market and that it requires a good understanding of that target market.

**Shanghai General Electronic Digital Technology Co. Ltd.** has developed from an ordinary conventional color TV supplier to today's pioneering electronic group specializing in the manufacturing of high-end PDP TV, TFT-LCD (flat) monitor and DLP TVs. Its annual sales reach 4 billion USD. The following illustrates how the company manages to develop the USA market utilizing a unique distribution strategy.

Upon entering the USA market, the company made a series of important decisions. First, it decided to mainly rely on distributors like Ingram Micro and D&H Distributing, who provided support in product promotion and services to the supplier. By means of cooperating with the distributors, the company was able to learn about other market opportunities in the USA. Although the company had direct sales with local retailers such as Wal-Mart and Best Buy, it came to realize that they are not able to meet the company's requirement in the aspects of logistics, services and promotion.

Secondly, the company chose to cooperate with the distributors for the product promotion in the targeted industries. Instead of spending millions of US\$ in establishing the brand name, it chose to attend various industrial conferences. Distributors found the company very attractive, since it enabled them to provide their customers with lower cost products. This had significant meaning to those small to mid-sized electronic retailers, who had been historically competing with Wal-Mart.

Lastly, the company decided to avoid low-end color TV markets, where it might encounter fiercer competition from other Chinese companies who entered



the market as OEMs. The company focused on high-end market products, such as PDP TV, or TFT-LCD monitors, areas where there was less competition. Product prices were set lower than that of their competitors from Japan or Korea, but higher than that of those suppliers who pursued a pure low-price strategy. Hence, on-line stores, such as Amazon.com, BJ's Wholesale Club, Buy.com, Costco and Office Depot became another effective channel.

### **Final Thoughts**

Knowing the local market and developing a proper distribution channel is critical to a company to enter into any new market.

Although the process discussed here may seem basic and unsophisticated, it is necessary to engage in the steps put forth so to successfully choose the proper channel partner or distributor to represent a supplier's brands, products and services. A failure to choose the correct channel partner or distributor is the easiest way to fail in any market – local or foreign.

*You are kindly invited to read Dr John Caslione's insightful and valuable articles that will appear each month in "Expression" magazine in his column entitled, "Caslione's Marketing." Dr Caslione's new ideas and strategies will assist your company to grow and prosper successfully in the new global economy.*