

One customer system across Direct Sales, Digital, and Distributors.

When Direct, Digital & Distributor Sales creates the greatest value

Direct Sales, digital channels, and distributors operate in parallel—sometimes on the same account. Leads, data, and accountability break at channel boundaries; customers face duplicate outreach, inconsistent pricing, and unclear handoffs. The critical decision is which channel leads when.

Specifically, you need to

DECIDE	BECAUSE ...
Which channel leads by segment, buying situation, and journey stage	historical ownership and internal power do not produce customer-led channel roles.
How leads, data, and customers move seamlessly between channels	unclear ownership depresses conversion and creates duplicate outreach.
How pricing, compensation, and escalation prevent channel conflict	otherwise, each channel optimizes locally while the customer system loses.

VALUE DRIVER 1 • DESIRED BUSINESS OUTCOME

For every buying situation, the lead channel and handoffs are clearly defined.

You gain one integrated sales system—not another channel:

- **Direct, Digital, and Distributors take on clear roles.** Customer segment, buying situation, advisory need, preference, and economics determine which channel leads or supports.
- **Every handoff has an owner, data, and a next action.** Lead routing, account ownership, pricing, compensation, and escalation connect the channels into one seamless customer journey.

VALUE DRIVER 2 • HIGH DECISION CONFIDENCE

Your channel decisions hold up because customer preference and economics count together.

The Hybrid Channel Architecture answers three system questions:

- **Prove customer preference and journey.** Segments, buying situations, and journey stages are linked to the desired interaction, advisory need, and observed customer behavior.
Outcome: channel roles based on the customer view—not historical ownership.
- **Compare channel economics.** Conversion, cost, reach, value contribution, and strategic role are assessed by segment and journey stage.
Outcome: a robust channel decision instead of a blanket digital or direct-sales quota.
- **Design conflict-free handoffs.** Ownership, data flow, lead routing, pricing, compensation, and escalation are defined using real customer journeys.
Outcome: one seamless journey with clear rules for every channel.

VALUE DRIVER 3 • RAPID DECISION

Within approx. 8 weeks, three parallel channels become one manageable customer system.

The sprint moves you from channel alignment and account conflict to clear roles, handoffs, and a pilot-ready customer system.

- **Weeks 1–3: Locate channel breaks.** Customer journeys, conversion, data flows, conflicts, and economics are analyzed using real cases.
- **Weeks 4–6: Decide channel roles.** Roles by segment and journey, plus ownership, handoffs, pricing, and incentives, are defined.
- **Weeks 7–8: Secure the pilot.** The end-to-end journey, pilot market, KPIs, governance, and scaling decision are finalized.

Sprint principle. First prove customer and channel breaks, then decide roles and handoffs, then pilot the interaction through real journeys.

VALUE DRIVER 4 • LEAN CLIENT COMMITMENT

Existing customer, channel, and funnel data are sufficient for the decision.

Strat-Exx consolidates existing customer journeys, funnel, pricing, and channel data into a few role and handoff decisions—without a new platform project.

Your organization contributes only four things:

- customer, channel, funnel, pricing, and economics data,
- existing journey, lead-routing, account, and compensation rules,
- participation from Direct, Digital, Distributor Management, and Marketing,
- decisions on ownership, handoffs, pricing, and incentives.

VALUE DRIVER 5 • CONTAINED CHANNEL RISK

No additional channel until existing roles and handoffs work.

The greater risk is not launching a new channel later. It is investing in more reach or technology while the current system already loses leads, data, and customers at its channel boundaries.

The sprint contains that risk:

- Channel roles connect customer preference, journey, and economics.
- Every handoff has an owner, data, next action, and escalation.
- Pricing and compensation rules are decided together with channel roles.
- Broad rollout follows only after a proven end-to-end pilot.

Proven experience. At a company generating about €800 million in revenue, three parallel channels were integrated, channel roles by segment clarified, and handoffs defined along the customer journey. Digital conversion increased by about 25%, while account conflicts declined.

By the end of the project, every decision is backed by tangible evidence:

- A. a **customer-journey and channel-break map** across segments and buying situations,
- B. a **Hybrid Channel Architecture** with clear roles for Direct, Digital, and Distributors,
- C. **binding** channel, segment, and buying-situation rules for customer coverage,
- D. seamless **customer journeys and handoff playbooks** with owners and next actions,
- E. clear **data, pricing, compensation, and escalation rules** to prevent channel conflict,
- F. a **pilot and rollout plan** with KPIs and a scaling decision.

The measure of success. What matters is not the share of any single channel, but whether customers move frictionlessly to the right channel and next step.

Where does your **customer** lose time or trust today – because your channels operate in parallel instead of as one system?

YOUR CONTACT



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CONFIDENTIAL STRATEGY CALL

30-Minute Conversation

Via Google Meet · book anytime

calendly.com/clemens-oertel-strat-exx/30min

SCAN & BOOK

