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**PERFECTING  
PARTNERSHIPS  
ROUNDTABLE**

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## Acknowledgements

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### Barb

Barb Girson,  
Chairwoman, Perfecting Partnerships Roundtable  
President and Founder, [My Sales Tactics, LLC](#)

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HOW PERFECTING  
PARTNERSHIPS  
— B E G A N —

## How Perfecting Partnerships Began



What is a perfect partnership? It can undeniably take many forms depending on who is involved. But, at its core, a true perfect partnership is one in which communication, ethics, and clear end goals create a mutually beneficial outcome greater than the result of each party working alone.

To continue with the message presented in the Feb. 2014 issue of *Direct Selling News*, the Perfecting Partnership Roundtable was created to cultivate valuable ideas and pinpoint best practices for relationships between DSA Member and Supplier Companies. The roundtables were truly a partnership in themselves; the DSA and several member companies collaborated to make the vision a reality. During the 2014 Annual Conference, roundtable participants drew on personal experiences to determine what aspects of working partnerships were successful and what aspects needed improvement.

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This roundtable has potential to be an ongoing discussion to gather insights on how we can improve these business-to-business relationships to begin to see a multiplying effect. As the individual parts are strengthened, we are sure to strengthen the entire industry. The continuing narrative aims to answer these three questions.

1. How can we improve our strategic partnerships?
2. What are the best practices for working together?
3. What can be done to advance the success of all DSA members – both DSA Supplier and member companies alike?

Prior to the roundtable, we asked DSA members to complete a survey to help identify areas of interest and concern. The information gathered from the survey helped shape the roundtable discussion at the DSA Annual Meeting and allowed us to identify the top five factors that impact direct selling business partnerships. They are in descending order:

5. DSA Membership—More than 80 percent of respondents stated that a DSA Supplier being a DSA member was an important factor in choosing a business partner.
4. Communication & Contact—Networking, both formal and informal, was the most effective way to engage with potential partners and clients to over 80 percent of survey participants.
3. Champagne Tastes & Beer Budgets—Also classified as setting realistic expectations. When both parties are clear about how far a set budget can really take you, the end result is more satisfying and the relationship works more smoothly.
2. Decision-making Authority—Making sure key decision makers are involved at the start of the process can save time and headaches. It's okay to have someone assigned to do the legwork on a project. However, when it comes time to make a decision about a vendor or program, keeping the key players in the loop will prove beneficial.
1. H.I.F.—Also known as honesty, integrity, and fairness. A number of factors that are crucial to a thriving partnership fall within this category. Responsiveness, timely payments, equality, business ethics, and delivering what was promised are all essential to a successful business relationship; they also are often the issues that make partnerships take a turn for the worse.

With these five factors in mind, we developed the roundtable discussion to recognize the elements needed to create a perfect partnership. Discussion groups were asked to identify ideas, “Aha” moments, powerful questions, important action items, and elephants in the room regarding different topics on building strategic partnerships.



**THE PERFECTING  
PARTNERSHIPS  
ROUNDTABLE**



## The Perfecting Partnership Roundtable

To begin the roundtable discussion, participants were asked to share how they felt when sitting down for the session. Words such as *excited*, *optimistic*, and *curious* were most popular. With excitement, optimism and curiosity in the air, the roundtable began. After looking at the collected discussion data, the information was compiled into three main themes: *Working Together*, *Changing Environments*, and *Best Practices*.

The following images are used to help identify important questions, topics, and ideas discussed during the roundtable:



### Working Together

Once a vendor is chosen, how do you decide to keep a vendor or jettison them? If a relationship is not worked on, it will fail. Problems may arise, such as vendors overpromising or clients not providing information in a timely manner. With honest communication, firm ground rules, and clear expectations, a relationship will have the right foundation to succeed.

● We found the top three concerns for working together:

- DSA Suppliers don't listen, and therefore, do not satisfy the needs of members
- Industry needs are not known
- Members don't set clear goals and expectations
- Small companies rush into vendor decisions

Tips to succeed, as compiled by the participants:

- Member companies might consider discussing budgets and end goals up front, before getting into strategies and specifics.
  - » Have realistic expectations for services; vendors can't transform businesses overnight. Don't micromanage; let DSA Suppliers do their jobs. That being said, don't be afraid to talk about misalignment of expectations, and decline services if the vendor isn't a good fit. Vendors need to know if they're doing something wrong in order to make it right.
  - » Welcome DSA Suppliers into the company culture. Help them try to understand the company so they can better tailor their solutions. Recognize

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that DSA Suppliers can't hold up their end if direct selling companies don't provide them with what they need to execute. Each department within the company needs to communicate effectively and efficiently to get necessary information to the vendor and respond to deliverables in a timely manner. Appoint a company liaison who is enabled to make decisions to communicate with the vendor and increase efficiency internally.

- It is recommended that DSA Suppliers focus on the needs of each client individually and adapt strategies to the client's needs and culture.
  - » Mold products to fit the end result, not the other way around. Don't try to sell member companies what they don't need. Instead, focus on what can be done to help them reach their goals. Don't over-promise; if a service is not provided, be honest; give an open referral. It could win you loyalty for services you do offer. Once solutions are decided, the processes should be simplified, laid out step-by-step, and explained clearly so that the client knows exactly what they will get and what is needed from them. Focus on customer service; news travels fast, and referrals are important.
  - » Give regular results and updates to the client. Check up often with clients to see if needs are being met. If not, have a conversation to fix it. Schedule weekly meetings for updates and monthly meetings for results.
- Small companies should consider being creative and thorough before choosing a vendor or service.
  - » Do a lot of research, especially for software. Take the time to do the three-hour demos, talk to other companies to get pros and cons, and get references and referrals. Be wary of signing a long-term contract, in case you discover you need a different service or partner and want to easily to switch vendors. Make sure the projects you start have built-in scalability.
  - » As a small company, don't be afraid to ask for special deals to help get you off the ground. Identify the stage of your company, take a good look at your finances, and be honest with what you can afford. Spending too much money won't help you succeed. One strategy is to try breaking up clustered packages to get only what you need and can afford.
  - » Understand that you need to supervise the vendor; they don't love your people or products in the same way that you do. Check up on your products in their warehouse, if applicable. Make your consultants part of the conversation; consistently coach and communicate with your consultants regarding changes or additions to products and services. The better you know your company, the more quickly you can spot a problem and make a correction with the vendor or service.

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- Ask questions of the DSA Supplier before, during, and after starting a project. It's important to have a clear understanding of a deal before it's enacted. Have weekly meetings, preferably in person, to make sure the solutions are on track and results are as expected.
- Members and DSA Suppliers should concentrate on ethics and compliance. Be honest and have integrity. Leadership should model that behavior; it starts at the top.
- Suggestions for the DSA to consider.
  - » Hold more events with increased interaction between member companies and DSA Suppliers, including small group discussions and quick 20-minute vendor spotlight sessions.
  - » Conduct a survey of DSA Suppliers and members to determine what the demographic is, what services are being offered, and what members are looking for. Provide contact information for all attendees of an event so they can follow-up after networking. Provide statistics such as top companies and markets for sales, marketing intelligence, and new DSA member demographics to keep everyone informed.
  - » Provide more training. Host more webinars on sales field training.
  - » Provide more support for DSA Suppliers who attend and sponsor the association, along with multinational attendees. Improve ease of access and use of registration and website.
- Set up speed dating-like sessions and meetings between DSA Suppliers and clients.

• These unanswered questions still remain:

- How can vendor relationships help member companies recruit consultants?
- What kind of training on forming relationships can be supplied?

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## The Changing Environment:

With the age of technology and the rise of the millennial population, the direct selling industry is changing. As a result, member company and DSA Supplier relationships also are being forced to adapt to these changes. Technology can be an enabler of better relationships, provided that companies and vendors can adapt to its use and agree on how to use it together.

• We found these problems to be the top concerns for the changing industry environment:

- Adapting to changes in the environment
- Forging the right tech relationships
- Getting ahead using technology

Tips to succeed, as compiled by the participants:

- Member and supplier companies should consider leveraging changes in technology in an evolving industry to market products more effectively.
  - » Consider allowing personal social media pages as well as business pages. Consumers are checking business pages less and less. Sales force may accomplish more by being allowed to use personal social media. Use social media to talk about successes.
  - » Be more open on reporting and sharing company information. Consumers are increasingly interested in the full spectrum of supply chain for what they consume; be aware and prepared to deliver the information they want, like sustainability and DSA Suppliers. Direct selling and social media sites offer a powerful avenue for sharing information about a product line's ethical manufacturing and distribution. This type of information resonates with millennials and can be a huge image booster.
  - » Brand alignment is important; expect and promote opportunities to present the company's brand image, and capitalize on these opportunities. Capture all of the growth possible through your single brand, which should align with your company culture as well.
  - » Attracting younger people as consultants can help break through some walls of technology and the younger generation. Technology won't increase recognition, but it will increase impact. Use technology to genuinely brand companies.



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- Make sure that the client-vendor pair is compatible.
  - » Members ought to consider using events like DSA annual meetings to reconnect with other members, introduce themselves to new vendors, and get referrals. The annual meeting can provide insight into and a side-by-side comparison of different vendors.
  - » Use technology to build the relationship between the member company and the vendor. Utilize e-mail and video chats if meetings in person are difficult or cost prohibitive. Make sure the vendor understands and can market the culture and brand of the company.
  - » Business and technical requirements must be clear. IT teams from both sides should talk early to avoid misunderstandings of capabilities. Go through an internal process with all departments to make sure they are all in sync before approaching a vendor. Sales and marketing departments ought to consider knowing the basics in IT as it relates to products they are selling.
  - » Training should be simple yet thorough, interactive, and accessible. Give as much web-based training as possible to keep costs low and training easy to access. Use video podcasts to keep training fresh and current or make training meetings fun showcases with the training slipped in.
- Small companies should approach customers differently than large companies.
  - » Bring millennials in as preferred customers and gradually teach them how to be distributors. Put the product and brand first; if they believe in the product, they need to be able to tell the story. Millennials will use free advertising platforms—social media—that previously were virtually untouched to tell peers about products they love.
- DSA should consider putting on a developers' summit to bring together vendors and members in a tech-centered setting.
- These unanswered questions still remain:
  - Will the industry be open to integration and alignment with other channels?
  - How do companies promote products and services to younger audiences? Are texts and the web better or do live events produce better results? What will motivate the younger generation to buy? How can companies create effective recognition programs as demographics and expectations change?
  - What impact do the trends in customer expectations of immediate delivery have for the industry? How do companies prepare to be ready for the technological change that will happen in the next ten years and can't be imagined yet?
  - How important is social media usage in deciding on a DSA Supplier? How does the use of social media change vendor-client relationships?

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## Best Practices

Creating good relationships is important in growing and maintaining a successful business. Direct Selling companies and DSA Suppliers must find ways to trust each other to achieve their selling goals. With a proper selection process, clients and vendors can have quality relationships.

● We found these problems to be the top concerns for creating partnerships:

- Poor quality of services
- Having to blindly trust vendors
- Not choosing the right vendor
- Poor communication in projects

● Tips to succeed, as compiled by the participants:

- Clients need to be more open with vendors.
  - » Have an extensive list of criteria when choosing vendors, and only hire vendors that meet all of the essentials. Interview and choose vendors that you believe will be effective partners; don't be afraid of turning vendors down until the right vendor shows up. Evaluate DSA Suppliers to see whether they will meet the company's needs and expectations, including size and scalability. Once a vendor has been identified, calculate expected return. Put in place decision processes to determine whether the solution proposed by the vendor is really needed.
  - » Candidly provide the situations, wants, and needs to the vendor for effective solutions. They need all relevant information to do their jobs correctly. If information is left out, it can impair the impact of the vendor's work. Communicate these goals in your RFP, and don't limit vendor access to just one employee at your company. Instead, provide a variety of information access points, including senior leadership and decision makers.
  - » Use realistic approaches to reach an end goal. Don't automatically expect something to go wrong, but prepare for it with contingency plans. Draft agreements and understandings up front so that if things go down the wrong path, an insurance and action policy is in place.
- Vendors ought to be more receptive to clients' needs.
  - » Do your homework before meeting with the member companies, so that meetings are more productive. Listen to the client and understand the issues the client faces. Have genuine conversations and offer solutions, rather than focusing on sales pitches and selling your products. When it's time to talk about helping the

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client, be open and honest about problems you can and can't fix, and avoid the quick and easy solution if it's not also the best solution. Provide the customer with a comprehensive solution that is personalized to the client's company.

- » Be visible to the industry by attending events every year. Ask for feedback from past and current clients and use their suggestions to improve your services. Use testimonials to convince other members at events such as the DSA annual meeting.
- Be honest, have integrity, and be fair.
  - » Strive to form a collaborative client-vendor relationship. Establish boundaries early on, and be committed to staying within them and trusting the partner to do the same. When scheduling meetings, be courteous and timely. Show up to all meetings or give appropriate advance notice about rescheduling. Don't be overly dependent on phone and e-mail. Face-to-face meetings and maintaining eye contact are typically the most effective ways to communicate.
  - » Develop a personal relationship. Get to know each other. Work together to learn from each other's expertise for the best possible final outcome. Have patience and learn from mistakes together, as partners. Openly communicate back and forth in a timely manner to help make sure both sides are on the same page.
- When looking to create a long-term partnership, remember that DSA Supplier members fill today's need. Strategic partners aim to build long-term relationships.
  - » Clients should look for vendors that have experience, are proven in the industry, and have built good reputations for giving clients the attention and care needed. Check testimonials and get referrals to find people and businesses that your company can trust.
  - » The vendor and client need to have a vested interest in each other's success. Cultural fit is very important. Partnership is a two-way investment, so neither side can be entirely flexible with schedules. Have authentic conversations to help create trust in the relationship.
- DSA should consider creating an Angie's List-type website for DSA Suppliers and members that could potentially provide insight and reviews of and access to vendors.

This unanswered question still remains:

- Do we need complicated and long NDAs? Could more honest conversations and simpler agreements that convey a sense of trust work better?

At the end of the discussion period we asked the participants to share their feelings with us, this time with a focus on how the participants felt after having the open and honest talk about partnerships. As we had hoped, the response included words such as *enlightened*, *collaborative*, and *relieved*.

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PERFECTING PARTNERSHIPS  
**ROUNDTABLE**  
**CONVERSATIONS**  
— ADDRESSED —



## Perfecting Partnerships Roundtable Conversations Addressed

Conversations at the Perfecting Partnerships Roundtable included many recommendations for DSA. Here's DSA's feedback on the six main themes collected from those conversations.

### **Recommendations:**

*Create an online review and rating system for DSA Suppliers similar to Yelp! and Angie's List*

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DSA is exploring ways to create an online review system for DSA Supplier companies to aid direct selling companies in the process of choosing a vendor. DSA's online Supplier directory listing currently includes a place for DSA Suppliers to provide client references. DSA Suppliers are encouraged to provide an updated, clear and comprehensive company listing to best convey their expertise to direct selling executives searching for their particular product or service.

*Introduce a vetting process for DSA Supplier companies similar to the one direct selling companies undergo when they apply for DSA membership*

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First, some background: As we all know DSA is the national trade association for direct selling companies and its primary mission is to police, protect and promote the industry. As such, an extensive review process is conducted for direct selling company applicants to ensure the company marketing materials, contracts, manuals, videos and other items comply with DSA's Code of Ethics. In addition to our strong direct selling company member roster, DSA is fortunate to have many long-standing industry vendors as part of our association. Though it is not legally possible for DSA to close the market place to any company wishing to offer their products or services to a member company, DSA does the maximum allowable research on each company prior to processing their application. In addition, we provide a guide for our direct selling members to use when selecting their DSA Supplier partners. The main lesson we share is that companies need to check references before entering into a business relationship. As mentioned above, DSA also makes it possible for DSA Suppliers to include letters of reference in their online company directory listing. We are considering making this a mandatory part of the DSA Supplier application process.

*Update DSA's direct selling member company directory to include more detailed contact information for key executives making it easier for DSA Suppliers to market their products and services to the right executive at each company*

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DSA's online company directory currently includes company information, demographics and key participating executives as provided by each individual member company. DSA is conducting a member communications outreach campaign to get more details consistently included and more direct executive contact information to best meet our DSA Supplier marketing needs.

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*Offer a DSA RFP system to connect DSA Suppliers and direct selling companies to expedite the proposal process and match vendors with companies more directly*

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DSA will work with the Member Services Committee to review the feasibility of adding this helpful functionality the DSA website.

*Continue to expand the opportunities for DSA Suppliers to share their knowledge and expertise with interested executives with workshops, express learning sessions, webinars, one-on-one meet ups and informal networking*

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DSA offers an online call-for-presentations form for DSA Suppliers who would like to conduct a workshop at an upcoming educational offering. All proposals are reviewed by the appropriate conference committee for possible inclusion. DSA plans to continue the successful express learning sessions at next year's Annual Meeting. Ample time will be spent promoting these sessions. DSA Suppliers are encouraged to contribute, at no additional cost, to the [DSA Supplier Source eNewsletter](#); produced four times per year, and specifically created to provide DSA Suppliers with a venue to communicate company news, important developments, and key tips/recommendations for direct selling companies based on their expertise. If Suppliers are unsure about what or how to contribute, they are encouraged to submit a potential article to DSA, and we will work with them to help get the message across each quarter.

*Offer opportunities for members to build communities and buzz before a DSA event through social media*

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DSA offers ways for members to engage through social media to build excitement for upcoming events, stay up-to-date on DSA events and industry happenings and contribute to the overall conversation. Each DSA event has its own hashtag (ex. #DSAAnnual for Annual Meeting). You are able to connect with DSA on [Twitter](#), [Facebook](#) and [LinkedIn](#).

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## DSA Suppliers: Get the Most of Your DSA Investment

Joining DSA as a Supplier is an investment in the growth and continued success of your business. More than likely, your goal is to establish and maintain client relationships and conduct business with direct selling companies so that you—and your clients—experience a mutually beneficial relationship. However, your investment in DSA is only worthwhile if you take advantage of the [opportunities available to you](#), and if you put the time and effort into capitalizing on these opportunities to the best of your ability. If you don't know where to start when creating your marketing strategy with DSA, look no further. Here you'll find a guide to your opportunities, and how to best leverage DSA events to your advantage.

### *DSA Supplier Directory Details—Promoting Your Company*

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A highly valuable benefit of your investment in DSA is your company listing in the [online directory](#), complete with the core products/services you offer, a description of your company and a link to your website. The best way to make the most of your listing is to make sure that your company information is always [up-to-date](#). Furthermore, it's paramount that your company chooses the primary products/services your company provides. Listing too many categories makes it difficult for direct selling company executives to understand your expertise when searching for a vendor. Do you want an additional marketing opportunity on your listing? For \$400, we'll include your company logo on your listing to enhance your branding. The DSA online directory is available to members 24/7; and, there are chances for you to market your company to direct selling companies in person as well.

### *Making the Most of Your DSA Meeting Attendance*

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Getting in front of DSA meeting attendees and industry experts at every opportunity and becoming a familiar face establishes your company as consistent and recognizable. As you may know, Annual Meeting is the largest DSA event of the year, and is a crucial time for networking and company visibility; however, you may not be aware of other events available to you [throughout the year](#). You are encouraged to contact DSA at any time with questions about upcoming events to understand how you can get involved. To assist in your planning for the event, if you are registered for a particular meeting, DSA will send you a list of attendees. You'll also receive a post-meeting attendee list with contact details and photos for proper follow-up. If you've ever attended a DSA event before, particularly the Annual Meeting, you know that meeting sponsors stand out from the rest throughout the conference. Attending a DSA meeting is great visibility for your company, but when you sponsor an event, direct selling executives are more likely to remember your brand.

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### *Raising Your Company's Profile*

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The DSA sponsorship program encompasses all of our major conferences, including, but not limited to, Annual Meeting, Be Connected, Companies in Focus and the Global Regulatory Conference. If you don't see a [sponsorship](#) that is of interest to you, contact DSA to discuss a custom sponsorship that fits your needs and your budget. Not only will your company be recognized on marketing materials for the meeting, as well as on event signage, there are also opportunities for you to provide a gift item to each attendee at your sponsored event to make a long-lasting impression. Many DSA Suppliers have seen great success by becoming a premium sponsor, and continue to do so each year. Consistent visibility that distinguishes your company as a meeting sponsor and supporter of the industry will go a long way. As a DSA Supplier, you are encouraged to participate on the quarterly DSA Supplier communications calls to not only learn about upcoming meetings and DSA Supplier updates, but also to share feedback and suggestions about how the DSA Supplier experience may be enhanced. One of the best ways to increase your company's visibility is by attending DSA's educational offerings and participating in all sessions open to DSA Suppliers. The Supplier Advisory Committee is also available to DSA Suppliers to share their recommendations for items to be brought to the DSA Board of Directors attention.

### *Getting Your Voice Heard and Keeping up with DSA*

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All DSA Suppliers are represented within DSA by the Supplier Advisory Committee. This committee, comprised of a select group of DSA Suppliers, acts as a liaison between DSA and its suppliers. This committee communicates your comments, questions, needs and suggestions directly to the DSA staff and, ultimately, to the DSA Board of Directors. So, if at any time, you have something to add to the conversation, you have access to the contact information of all members of the Supplier Advisory Committee, including the Supplier Advisory Chairman. The Chairman of the Supplier Advisory Committee serves as a voting member of the [DSA Board of Directors](#).

### **Final Thoughts/Conclusion:**

Making the initial investment in the DSA is the first step to growing your business and building long-term relationships. Whether you've just joined as a DSA Supplier, or have been a DSA Supplier for many years, understanding your marketing opportunities is extremely important and will help you budget for the future. The second step is to be patient, and to allow time for you to build a foundation of contacts. The DSA, specifically the staff who work directly with Supplier Community, are happy to assist you in maximizing your resources at any time.

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SELECTING THE  
PERFECT  
— V E N D O R —

## A Quick Guide to Selecting the Perfect Vendor

One of the most critical business decisions you make is finding the right vendors to support your needs. As you strive to make the most well-informed decision possible, use this quick guide to give you the upper hand in selecting the one that is right for you.

### Know Your Needs

Before tackling the vendor selection task, start out knowing exactly what your needs are for the product or service you require. Below are the questions to consider before the search begins:

1. What will be the use of these products or services? Is it for a short-term solution or for an ongoing business need?
2. Are the vendor's products or services able to provide your company with what it needs to fulfill its goals and objectives?
3. Will the products or services reduce operating costs?
4. Will the products or services increase sales?
5. Is this something you need right now, or would you be better off waiting?
6. Will the products or services simplify your employees' jobs or add more burdens to their workload?
7. Where is your company in terms of growth? How might your growth stage impact your vendor choice?

### Begin Your Search

Now that you have your needs established, it's time to begin your search. How do you start? First, check the DSA Supplier Members' online directory for a list of vendors whose areas of expertise includes serving the direct selling community. Next, follow these steps and answer these questions:

1. Develop an RFP based on your needs assessment.
2. Assemble a comprehensive list of prospective vendors and get their contact information.
3. Send all potential vendors the same RFP to ensure you aren't comparing apples and oranges.
4. Find out where the vendor is located. If in-person interaction is necessary, you'll need to make accessibility a key factor in the final decision.
5. Make sure they know the direct selling lingo. If not, decide if it is worth your time to educate them.

## Contact the Vendors

Now you have your list of potential vendors. Here is a sample of queries you'll want to pose to your prospective partners and yourself:

1. What types of other direct selling companies have they worked with in the past, e.g. party plan, person-to-person, etc.?
2. What specifically do they sell that will meet the solutions you seek?
3. Are you getting competitive prices from each company? If not, ask the company(ies) whose proposal is out of the average ballpark to explain why they think their price varies.
4. Establish if they have the infrastructure to serve your needs by asking how many companies they are currently serving or providing products? Are they confident they can support a new client? How do they plan to support your project? If it requires hiring more staff, will you get the experienced team?
5. Establish how stable the company is in terms of finances by asking how long they've been in business and if they've ever declared bankruptcy. Ask how big their staff is and the average staff tenure.
6. What is the normal time frame for implementing their services or receiving their products? Ask if they've ever had a shorter and longer timeline and then ask why those exceptions were made.
7. How does the company stay on top of the latest trends? What educational sessions have they attended in the last year? What industry publications do they read?
8. What kind of support will be provided once a service has been implemented? Is customer support available 24-7-365?
9. Does the vendor offer flexible solutions to accommodate your needs or are they only able to provide a one size fits all program?
10. Consider the long-term value of working with each vendor by doing a pro and con comparison.

## Narrowing Down the List

Use these tips to solidify your selection:

1. Narrow down your choices to two to three vendors based on your pro and con evaluation. Avoid follow-up from other vendors by informing them that you won't be continuing to consider them. Providing the non-selected vendors with the reason why they won't get your business also provides them with an opportunity to offer any possible modifications.

2. Contact those on your final selection list for a comprehensive list of randomly selected clients to call for references.
3. Make a list of questions to ask each reference that include open-ended topics that allow for more than yes or no answers. Ask about the good and the bad experiences. Set up appointment times with the references so that you don't catch them off guard and e-mail the questions in advance so they can be prepared. Ask them to tell you about other companies they know that work with the vendor. Contact these companies as well.
4. Request a formal bid from the final vendors so you can determine if the guaranteed pricing and availability the vendor is providing is competitive.
5. Ask for a demonstration or sample, if applicable, of the services or products you require.
6. Ask what their processes are for warning a client if their goods or services won't be delivered in time.

### **Selecting a Vendor**

Once you've selected the vendor you want to make your partner, make sure to confirm the following before you sign on the bottom line.

1. You feel good about the price negotiated. Is the price an affordable expenditure without compromising the quality of the products or services required?
2. Does the vendor have a clear understanding of the condition in which you expect your goods and services to be delivered?
3. What is the vendor's implementation process from requirement gathering to deployment? Are you aware of the pitfalls to avoid in order to keep the process on track? Are there fair penalties that will be applied if the vendor fails to meet the agreed upon timeline?
4. Is everything the vendor has promised spelled out and guaranteed in writing?
5. Have they provided you with all the information you need to be confident your business will be a top priority over the long haul?

Good luck finding the perfect partner with whom to build a successful and prosperous business. And remember, always ask, "Am I getting the right product or service, at the right time, for the right price?"





PERFECTING PARTNERSHIPS  
**SUCCESS**  
**STORIES**

## Custom Design Advantage

Thanks to our customer's willingness to include us in the planning for future events, we learned that they had a need for a sales promotion around their Nutrition drink.

We suggested a custom tote designed to carry their concentrated juice bottle. They liked the suggestion! They also requested a built-in pocket to fit their literature.

Their requirements were for the tote to hold three to four bottles plus the literature. We wanted the tote to be versatile, visible in non-sales environments and certainly built sturdy enough to last.

Working with our Asian factory, we came up with custom designs incorporating their logo colors, their logo imprinted on the tote, separators to allow the tote to be configured to hold one to four bottles with an external pocket sized to fit their literature. The factory also built the tote sturdy enough to hold the weight of up to four bottles by stiffening the bottom and sides with material, extending the handles, and reinforcing the stitching.

The preproduction sample was beautiful, sturdy and right on the mark. The customer requested one change to the handles, to make them long enough so the tote can be slung over one's shoulder. An easy change!

Thanks to our customer including us in the planning process, we had the time line [120 days] and the information to develop this item for them.

The results of the promotion increased show sales volume which reflects the demand for the tote by their sales force.

Aside of the increased sales, what excites our customer the most is the versatility of the tote. With the separators removed, it can be used as a grocery bag, a beach bag, for travel, almost anything, creating multiple brand exposure opportunities for their sales force.

We believe promotions and brand recognition should be visible, useful, reusable and fit into your salesperson's lifestyle.

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Paul Piscitelli | Supplier Member DSA since 2001

### **PAUL ANTHONY AWARDS**

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We create visible bragging rights for your successful sales people!

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## Partnership Story for PRO Insurance Managers, Inc.

In 2005, the **Direct Selling Association**, after a thorough two-year vetting process, exclusively endorsed the **Health, Life & Direct Seller Liability Insurance** programs offered by PRO to members.

Currently partnered with more than 65 DSA members, companies are offering the expansive program line-up including Health, Direct Seller Liability, Life insurance, Dental & Vision, Identity Theft and more exclusively to their field. These exclusive partnerships represent over 45 percent of U.S. based direct selling firms reporting annual revenue of over \$100 million<sup>1</sup>.

These programs are helping define the success of the DSA member company and their distributors including tangible attraction and retention results. PRO's personal participation at meetings assists in promoting the member company's offering of the opportunity to their field. Programs provide a pathway out of a job to full-time direct selling as consultants do not need to remain in a "job" for benefits. Programs have demonstrated strong success where sellers use them as an additional recruiting tool for downline.

Our best Partnership story comes directly from Mary Kay's Ethos Award submission letter to the DSA for PRO Insurance in which they said: "Mary Kay Inc.® began a partnership with PRO Insurance in July of 2007. Mary Kay was interested in offering a resource to our Independent Beauty Consultants that would help them find affordable plans for individual and family health insurance coverage. Fortunately, the Direct Selling Association had already vetted and established a relationship with PRO Insurance Managers, which made our decision to move forward less complicated knowing the DSA has very high standards.

PRO launched their program at the Mary Kay annual seminar in July 2007 and was enthusiastically embraced by our the sales force. The Independent Beauty Consultants now had a place that they felt confident they could get questions regarding insurance answered, and Rich Fuchs and his staff did a wonderful job of making each Independent Beauty Consultant feel that her success is his top priority.


"Since 2007, PRO has expanded to offer a variety of insurance programs to our field and the excitement that was generated with the launch has not diminished. Substantial numbers of Consultants have taken advantage of the various programs and report excellent results in not only realized savings over current coverages, but also in increased protection and peace of mind.

"Additionally, PRO has helped tens of thousands of consultants protect their Mary Kay business activities through the industry specific Direct Seller Liability program, enabling them to confidently do business anywhere nationwide knowing that their business is properly insured. We hear many stories from delighted members of our sales force who have been able to obtain excellent liability coverage at substantial savings.

“We have always appreciated PRO’s professionalism, its energy, their understanding of the unique needs of direct sellers and their continuing substantial support of Mary Kay’s efforts to bring class leading services to our field. PRO is an outstanding supplier to the DSA and also to each member of our independent sales force with whom they work.”

<sup>1</sup> As reported by *Direct Selling News*

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## Five Tips for Better Content, Better Relationships

By IMN

During the 15 years we've worked with brands on their marketing efforts, we've seen firsthand how better content can lead to better relationships with customers, new and old. Here are five things we've learned along the way:

- **Authenticity.** Your brand story should be more nonfiction, less fairy tale. Develop content that accurately and honestly reflects what your company is and how you choose to operate. Strive to provide a balance of informative, entertaining, and engaging content that appeals to your customer base and maintains a genuine, consistent brand voice.
- **Relevance.** Knowing who your audience is and what they're interested in can help you offer content that is pertinent to their lives, engages them, and encourages them to join conversations about your brand. Offer consumers relevant content that gives them a reason to get to know and care about your brand.
- **Perspective.** Consumers want to be entertained and informed, not marketed to or sold. Put the focus on your customers, not your marketing goals, when developing content. You'll be better able to provide authentic, relevant content that keeps your audience interested.
- **Frequency and Variety.** It can be challenging to stick to your publishing schedule and find fresh content that regularly appeals to your audience. One way to overcome that is to embrace consumers' desire for variation and choice. Use an array of content types and topics to capture interest and keep people engaged.
- **Transparency.** Being transparent—about the good and the bad—can help your brand build trust and goodwill. Don't try to hide negative feedback. Instead, show consumers how your company responds to problems and handles adversity.

Relevant, engaging content is an important tool in helping brands build better relationships with their customers. By keeping these five things in mind, you'll be in a better position to create content that establishes you as a brand of choice and a trusted resource.

### About IMN

IMN provides content-driven digital marketing solutions, including newsletters and behavioral analytics, for companies of all sizes serious about effectively engaging customers and prospects.

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## Barb Girson's Top Way to Increase Recruiting

If you aim to increase recruiting, teach your sales force to increase their talk-time and reduce their type-time. Consultants often try to advance the recruiting relationship through e-mail. E-mail is a useful tool for sharing information, but not a good tool for relationship-building.

You've all heard your Consultant's story, "I am so excited! I met someone who's really interested!" Then what happens? After several e-mails, the recruit prospect stops returning calls or e-mails. Inevitably, the Consultant is left wondering, "What went wrong?" "Was the interest real or imagined?" With e-mail communication, it's difficult to know. E-mail provides ease and convenience. However, there is no good substitute for the relationship-building powers of verbal exchange.

A study by Mattitياهو Zimblar and Robert S. Feldman at the University of Massachusetts reveals when people get to know one another, 70 percent of people lie about information ranging from their feelings to their achievements, but the incidence of deception is higher over e-mail than in face-to-face meetings.

While most prospects probably do not consider their responses as downright lies, e-mail provides a veil for untruths. What's really happening is the potential recruit uses e-mail to spare the feelings of the Consultant. E-mail saves prospects from the discomfort of having to be direct, so they safely dodge responses or leave recruiters with false hope.

Since e-mail is such a distant form of communication, getting a read on authentic interest is difficult. If you want to get more recruits, get your sales force talking instead of typing.

### Key Insights:

- Recommend that your field leaders increase their talk time and reduce their type time.
- Suggest your field leaders use e-mail communication for sharing information.
- Encourage your field to talk to their prospects via phone, Skype or in person to pick-up verbal and non-verbal communication cues of interest or lack of interest.

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Excerpt from: [eBook](#)

Complimentary Download: [Cultivating Your Sales force](#)

### **[Barb Girson](#), Speaker ... Sales Trainer ... Executive Coach ... Consultant**

*Helps Teams Gain Confidence, Get into Action & Grow Sales*

[www.MySalesTactics.com](http://www.MySalesTactics.com)

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## VIVA Creative

### **Disruptive Innovations: Inspiration for your brand and the World**

At VIVA Creative, our team finds the idea of disruptive innovation to be at the core of what drives our strategy. We don't just try and solve a problem; we strive to find a solution that will profoundly change the way our clients' brands compete in the marketplace.

Following are a few examples of disruptive innovations we find exciting and want to share to inspire you and your business to think and act differently:

#### **Starbucks Introduces Wireless Charging Tables**

Starbucks has started to implement wireless charging tables for customers to recharge their phone simply by placing it on a designated spot on the table. Perhaps this technology could be implemented at cocktail tables or meal breaks at your events.

[Click here to read the full article.](#)

#### **College Football Hall of Fame Utilizing RFID**

Radio Frequency Identification (RFID) technology is quickly becoming the gold standard for user experience customization at events. For example, the new College Football Hall of Fame will feature advanced RFID technology to customize each visitor's trip. Selecting a school at the beginning of your visit will personalize the information you view and listen to as you pass through the exhibits. Read more [here](#).

#### **More in RFID as Lollapalooza is Going Cashless**

Lollapalooza music festival will be completely cutting out credit cards this year, and giving all attendees RFID equipped bracelets. Learn more about the upcoming event [here](#).

#### **3D Printing: The PancakeBot**

Ever struggled to get people to attend your early morning sessions? Why not introduce 3D printer-made pancakes made by the PancakeBot. 3D printing will play a major role in all of our lives soon, so why not start with breakfast. With the ability to produce any desired shape via the bot, conference-goers could enjoy pancakes unlike ever before.

[See it in action here creating the Eiffel Tower!](#) and learn more at [PancakeBot.com](#).

#### **Points: World's Most Interactive Street Sign**

Brought to you by Breakfast NY, Points is an interactive street sign that updates as your sessions take place. These signs are fantastic way-finding tools for large conferences. Learn more [here](#).

#### **About VIVA**

We specialize in CONTENT, DIGITAL and EXPERIENTIAL marketing supported by in-house strategy and production. We produce flawless meetings and events, professional media content, and innovative digital work.

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## Dick Wilson's Top 10 Event Production Tips

1. When putting together your audio/visual request for proposal (RFP) set a dollar amount you're willing to pay and include that information as part of your RFP. Expect about half of your A/V budget will go for labor and the other half for gear.
2. Have a dedicated music person, even if that means hiring a DJ. Don't expect the A/V company's sound man to do music while handling sound as well.
3. Limit who has input on scripts, but make sure you include everyone who should have input during the review process. Rehearsal is not the time to debate content.
4. Don't spend a lot of time worrying about who introduces whom, or coming up with slick transitions between scripts. Do worry about creating logical transitions within your scripts.
5. PowerPoint slides should favor visuals over words. Think of the screen as a co-presenter, not an echo. Let your visuals support you, but not steal the focus from you.
6. Allow time for rehearsal on the stage and using the actual (not stand in) MC's. Take time to choreograph stage flow and movement. Understand that rehearsals are as much for the A/V crew as they are for the MC.
7. Treat your tech crew members as if they are part of your home office team. That should include making them part of your meal count.
8. Create your schedule using Excel, not Word. Excel has a built-in time calculation ability that will save you tons of work as you revise your schedule.
9. Make your scripts friendly and conversational sounding, not formal or business-y.
10. Collect attendee testimonials at every event. You'll be so glad you have these testimonials when it's time to promote an upcoming event.

[Luce Murphy Fong](#) is a direct selling consulting firm founded by Direct Selling Association Hall of Fame inductee Alan Luce. We have experts in every field that's important to a direct sales company.

## Mobilize Your Network

Your top-to-bottom technology and communications strategy should be as smart as the phones and tablets your representative's carry. Mobilize your network with a suite of premium technology and communications products and cloud-based services that drives an immediate positive impact to sales and recruiting.

When evaluating, planning and implementing business solutions for the direct selling industry, one must work with an industry vendor that has earned the respect and trust of companies and individuals operating worldwide. Whether you're a company or an individual, established or emerging, it's imperative to offer a variety of industry tested technology and communication solutions for your business. The portfolio of technology and communications solutions should be mobile-optimized, social media integrated, and be deployed in an agreed to short period of time. Engage with a partner that prides itself on on-time delivery and bringing true bottom line value to its industry clients. Through quality products, services and support, your partner should always strive to make sure that a project road map is adhered to with proper communication and transparency.

### Company Bio

Smart Office is run by industry executives with over 75 years of supporting direct selling member companies. From our conferencing and text marketing platforms to our back office software, live streaming and virtual event platforms, you have found your one-stop DSA technology and communications DSA Supplier vendor. Smart Office was a finalist for the 2013 Partnership Award, and award presented by the Direct Selling Association to the industry's best DSA Supplier vendor partners.

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## What Producers Expect from the Home Office

By Terrel Transtrum

Our studies of high-retention field leaders have yielded precious insights for corporate offices on how they can help advance team retention. Below are the six most frequently stated expectations:

### 1. Provide Data

Give meaningful, timely data with clear instructions and training on how to use it. Plus, show field leaders how they benefit from consistent, accurate interpretation and use of data.

### 2. Provide Field Training & Development Curricula

Identify what the field requires to succeed and then provide the tools to do so. Begin with a fast-start training program that points a new recruit to what they must know and do to be successful. Then continue with specialized training and development programs.

### 3. Provide Dedicated “Hot Line” Support for Field Leaders

Highly productive field leaders almost always handle more than their share of customer service and field issues, sparing the company a great deal of work. In return, the savviest companies provide their highly successful retention leaders with VIP support in the form of fast access to qualified, empowered corporate employees who can clear out hurdles.

### 4. Define the Sponsor’s Role in Fast Start

Provide specific guidelines and training for sponsors of new recruits. Especially for the inexperienced sponsor, spell out the vital elements of their roles starting at signing a new recruit.

### 5. Train for Retention

Where all companies provide varying degrees of training in prospecting and building, few provide any training for retention. Too often, companies assume retention will just happen. What gets trained and managed gets done.

### 6. Reward for Retention

Consider building in recognition and rewards that instruct and inspire field leaders toward retention. This may be as simple as a special award at the annual conference or be part of your company’s compensation plan.

### BIO

Terrel Transtrum is a seasoned advisor and coach with a creative, entrepreneurial style. Recipient of the 2009 DSA Partnership Award, Terrel has impacted the lives of front-line customer service reps, corporate managers and executives, and hundreds of thousands of distributors in more than 400 companies. [terrel@servicequest.com](mailto:terrel@servicequest.com)

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## Right Priorities + Right People = Great Companies

It's been said you can determine what is important to people by looking at their schedule and their checkbook. While checkbooks aren't used much anymore, the axiom is still relevant. People spend money and time on what they value. The same holds true in companies. Every day, companies are determining their priorities by where they choose to expend their resources.

While many organizations spend a lot of time and money on their product, their branding and messaging and their IT systems, the most successful companies also focus on their people. In Direct Selling, we leap to thinking about our independent distributors and, while our field organizations are hugely important, the great companies they should consider their entire employee base.

### Here are some good “people” questions to ask yourself:

- Can you define your culture so that you can bring people into your organization that fit?
- Do know if you have the right people in the right positions in your organization?
- Are you using leading-edge assessment tools to evaluate your talent?
- Do you truly know who the achievers are in your organization?
- Do you know what job metrics are most important to measure in the individual positions on your team to maximize overall shareholder/stakeholder value?
- Do you measure and reward employees based on things they can control?
- Do your employees fully understand how their role and function impacts the overall performance of the company?
- Do you retain good employees?

If you answered “yes” to these questions, we would say you're well on the way to filling the seats on your bus in a manner that Jim Collins suggested in his book “Good to Great.” If you said “no” to these questions, it's not too late! Use these questions as a guide to help your company join the best in our industry and get the right people on the bus, the wrong people off the bus and the right people in the key seats!

IMPACT This Day Inc. is a Human Resources consulting firm with more than 25 years of experience exclusively serving the Direct Selling industry.



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**THANK YOU**

Mike Iacono



Scott Kerr



Michelle Larter

Dick Wilson



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## Thank You

We hope this review of the Perfecting Partnership Roundtable has been beneficial and has encouraged you to participate in future discussions surrounding strategic business relationships.

The event could not have been possible without the participation of those who completed the pre-event survey and attended the session. The Perfecting Partnership Roundtable Committee would also like to thank our facilitators, sponsors, and partners who collaborated with us, donated time and resources, and provided insights for this important project.

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Melissa Brunton, Senior VP, Education & Meeting Services, [DSA](#)

Mike Iacono, President, [Iacono Productions](#)

Scott Kerr, Executive VP, Business Development, [Viva Creative](#)

Michelle Larter, Worldwide Sales Director, Direct Selling Solutions, [IMN](#)

Britta Shillingsburg, Exhibit & DSA Supplier Membership Coordinator, [DSA](#)

Dick Wilson, Creative Director, [Luce, Murphy, Fong & Associates](#)

---

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Lyn Conway, President & Founder, [A Fresh Perspective Inc.](#)

John Killacky, Managing Director/National Sales & Marketing, [Bartha](#)

Al Wakefield, President, [Wakefield Global](#) and DSA Supplier Advisory Committee Chairman

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[E.A. Dion](#)

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[VIVA Creative](#)

[Wakefield Global Inc.](#)

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Andrew Leavitt with [Nu Skin](#)

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Neil Phillips with [Ultimate Coach University](#)

Linnette Reindel with [Jafra Cosmetics International](#)

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Andy Sherwood with [Dan Jensen Consulting](#)

Kara Schneck with [Nu Skin](#)

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