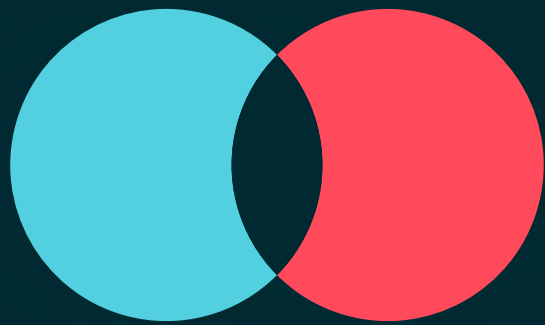


2ND EDITION

# THE PARTNER PLAYBOOK

How to drive revenue, get rewarded,  
and be an indispensable part of your company.



## Hey there, have we met before? Is this one of those déjà vu moments?

You might remember the Partner Playbook's debut back in 2019 — **That** was the first edition. **This** is the even better second edition.

For those who have scoped out our Partner Playbook before, you might get a warm and fuzzy feeling when you revisit the "**Source, Decide, Execute**" framework from the first time around. Don't be fooled, though — You can expect to find *a lot of new tactics*.

"**Source**" will show you how real-time account mapping opens up brand new workflows and possibilities.

In "**Decide**," we show you how to use your account mapping data to make the case for co-selling, co-marketing, or developing an integration with partners.

"**Enable**" is a new section. We've heard you: Empowering the sales team with partner data is a recurring challenge year over year (See? It's not just you. It's *everyone*). So, we've got lots of insights for **aligning your sales team with your partner strategy** — and making sure your partners are at the forefront of your most strategic opportunities.

"**Execute**" is our favorite. This is where you'll find co-marketing playbooks from companies like **ActiveCampaign** and **HubSpot**, frameworks for identifying the most strategic opportunities for co-selling with partners, and lots of other stories from the field. It's how experts like you get it all done.

Every partner program is different, and you know just as much as we do that there really isn't a perfect clouds-parting answer to most partnership challenges. We hope you'll pick bits and pieces of the Partner Playbook to adopt and make your own. There's a little bit for everyone — for all types of partner programs and all levels of partner program maturity.

To be indispensable is to be on a mission to find the right partnerships and meaningfully contribute to your company's growth. The fact that you're holding this playbook means you're on the right track.

Let's get started.



**Olivia Ramirez**  
Staff Writer | Crossbeam

P.S. Don't forget to let us know what works and what doesn't along the way. Tweet us **@Crossbeam**, and subscribe to the **Crossbeam newsletter** and **Ecosystem Sales** for more partnership insights.

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# Partnerships 101

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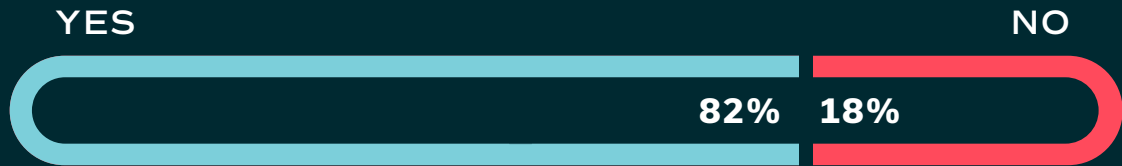
What they say about the arts is true for partnerships, too: You've got to learn the rules before you break them. And partnerships, ooh-wee, they are complicated. There are endless acronyms and terms with meanings varying from one program to the next. There's a lot to study up on, and things are changing fast.

Let's start with a little refresh of the basics before we get into the tactics. The following outlines the most common partnership types in the B2B SaaS space.

(If you're looking for a deeper dive into the types of partnerships and partner programs, take a walk through [Crossbeam's blog](#). There, we do our best to deconstruct the madness.)

## Channel Partnerships

Percentage of B2B SaaS companies  
with Channel Partnerships:



Source: Crossbeam 2021 State of the Partner Ecosystem Report

**Includes...** Indirect sellers, referral partners, agencies, affiliates, go-to-market (GTM) partners, resellers, system integrators (SIs), managed service providers (MSPs), Original Equipment Manufacturer (OEM) partners, value-added resellers (VARs)

Channel partnerships are when other entities sell (think: channel sales), manage, and/or deliver your product. Oftentimes, they're advocates for your product or services and sell on your behalf. As a result, they allow you to avoid hiring more sales reps or professional services (PS) employees. Your channel partners may make money through referral fees, taking a portion of the total sale, and/or selling their own services that complement your product.

The company who makes the product is typically referred to as a "vendor" and the channel partner who is selling, delivering, or servicing it is referred to as a "partner."

Channel sales help businesses scale. Quickly building a billion-dollar organization through direct sales alone would introduce a universe of complications and costs that prove incredibly difficult. Consider:

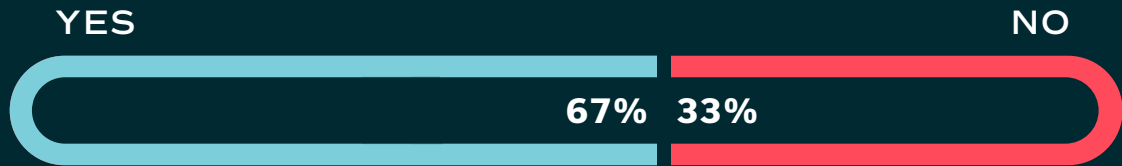
- 95% of Microsoft's revenue flows through its partners
- Shopify made \$673 million in revenue in 2017 (while its partners made nearly \$800 million)
- The Salesforce ecosystem is on track to be nearly six times larger than Salesforce itself

***"There is a reason Bill Gates can cure malaria."***

- Sunir Shah, Founder of AppBind

## Technology Partnerships

Percentage of B2B SaaS companies  
with Technology Partnerships:



Source: Crossbeam 2021 State of the Partner Ecosystem Report

**Includes...** Integrations, marketplaces, app stores, plug-ins, add-ons, and extensions

Technology partnerships exist when two or more companies integrate their products with one another. This can include sending data back and forth, creating new workflows, triggering events, enriching data across teams, and creating go-to-market (GTM) strategies. As a result, technology partners are sometimes called "integration partners."

Unlike channel partners (where you have "vendors" and then "partners"), tech partner relationships are bi-directional. Everyone involved is referred to as simply a "partner," "tech partner," or "independent software vendor (ISV)."

*Ecosystem is Everything.* Customers expect every SaaS product they use to seamlessly integrate with other tools in their workflows. If your integration can provide a "better-together" solution that improves their data visibility and ultimately their bottom line, you'll have:

- A more flexible product, able to adapt to varying use cases and personas
- More "stickiness" by tying into all of the customer's existing tools
- Better renewal and retention, and thus, more annual recurring revenue

"Partner programs are really just facilitators of ecosystems," says Matt Irving, Senior Manager of Global Partner Programs and Strategy at WP Engine.

## Technology Partnerships

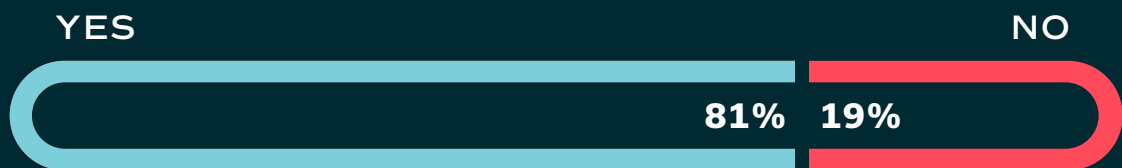
Consider the partnership between HubSpot and Google's Gmail:

- HubSpot is a CRM often used by sales and marketing teams as a "hub" for communication with prospects and customers.
- Many companies use Gmail and Google Apps as their email service.
- Gmail and HubSpot have an integration that allows Gmail users to quickly log emails in HubSpot, use HubSpot templates in Gmail, and track opens.

*(Read more about HubSpot and Gmail on page 67)*

## Strategic Partnerships

Percentage of B2B SaaS companies  
with Strategic Partnerships:



*Source: Crossbeam 2021 State of the Partner Ecosystem Report*

**Includes...** Joint ventures, industry alliances, strategic alliances

Strategic partnerships are long-term agreements that align the efforts of two or more companies with a big-picture vision in mind. It typically takes the shape of year-over-year campaigning, long-term product roadmapping and integrations, mutual advocacy and co-branding, and sometimes even a financial investment.

"It means the company believes there is enough value to carve out some engineering and product resources in a repeatable, programmatic way and have committed to following on with go-to-market investment," says Billy Robins, Head of Strategic Partnerships at productboard.



## Strategic Partnerships

Take e-signature platform SignEasy and Apple – partners since October 2019. The SignEasy team plans its product roadmap to align with Apple’s iOS releases. That way, SignEasy can be first-to-market with capabilities for the latest features on iOS devices – like widgets and iPad pencil.

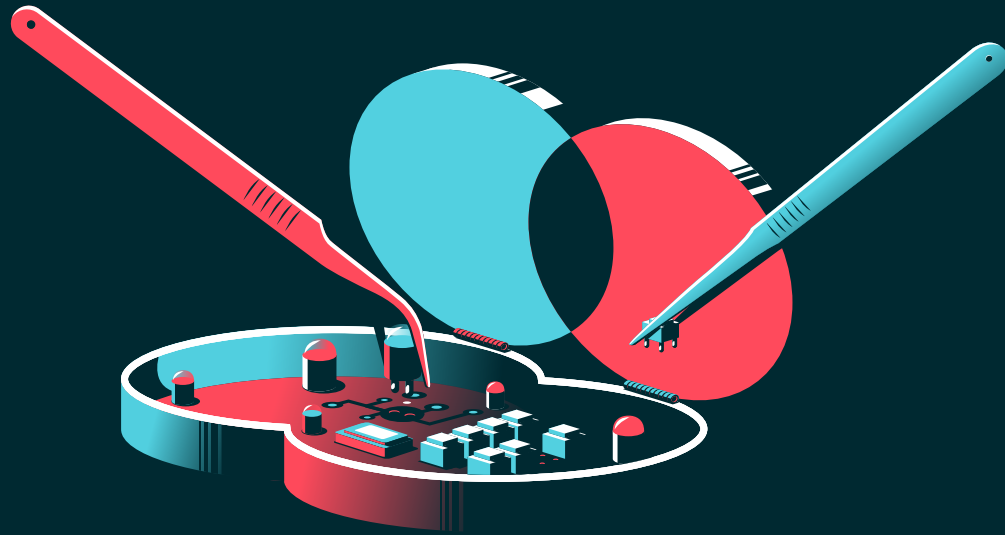
Being first-to-market gives SignEasy a competitive edge by making it easy for Apple to promote SignEasy’s advancements in tandem with its own, while other companies are not yet able to support its new features.

“In strategic partnerships, you need a big opportunity. Because partnerships are not about you, they are about adding value to another company,” says Maureen Little, VP of Technology Partnerships at Okta.

She adds, “So if you want to build a successful program, you need to be able to tell the story of the big, big billion-dollar opportunity that you’re enabling.”

Some strategic alliances focus on long-term visions for product development or revenue streams, while others set the stage for potential acquisitions (like when Adobe acquired Workfront for \$1.5 Billion).





# Indispensable Tactics: Source, Decide, Enable, and Execute

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Partnerships are an exchange. It's like your lunch table in elementary school: you offer something and they offer something. And then you either trade or — when you've got a milkshake and they've got french fries — combine dishes to make something that's greater than the sum of its parts.

At Crossbeam, we often think about successful partnerships in terms of data. Whether it's a channel, tech, or strategic partnership, partnerships generate more benefits when there is: data flowing in both directions, a clear playbook for what to do when data between the two parties intersect, and a way to measure and quantify success when that playbook runs its course.

- How to **Source** the data you need to choose the right tactic
- How to **Decide** which partners to work with
- How to **Enable** internal and external teams
- How to **Execute** the tactics



### Account Mapping

The first step of any partnership is account mapping – taking a list of your customers or potential customers (“target accounts”) and cross-referencing (“mapping”) it against a partner’s list of existing or potential customers. When matches occur, each partner can opt to share more data about the underlying accounts, such as the nature of the partner company’s relationship with the account and the sales rep or account manager responsible for the account. Account mapping gives you a bird’s-eye view of what’s possible.

To begin account mapping, determine which data sets each side wants to compare and how the resulting overlaps might be used to achieve the desired business outcome. It’s like figuring out the time slots each side has available before scheduling a meeting or making sure you know all of your guests’ favorite snacks: It’s the foundation for everything that comes next.

Account mapping data is typically sourced from a customer relationship management (CRM) platform like Salesforce or HubSpot. But even if both partners are using the same CRM, the process can be quite complex. Custom fields, bespoke business roles, and other nuances mean there is always prep work to be done to make a “clean” comparison.

To get accurate results, agree on which “match lists” you’ll be comparing, and have each side refine its own CRM data to these lists. The most common lists that are the building blocks for most partnerships are:

- Customers - The people who are actively paying for your product
- Open Opportunities - Potential customers who are in an active deal conversation
- Prospects - Potential customers who are not yet participating in any active sales process

## Indispensable Tactics: Source




You may notice that these lists map to sales funnel stages. Also, some companies will include "sub" lists like "churned customers" or "lost deals."

Once your account mapping exercise is complete, you can source data like this:

- I have 231 shared customers with my partner.
- 15% of my open opportunities use the same marketing automation software.
- 76 of the companies in my sales pipeline are customers of my partner.
- My partner and I see that our reps covering EMEA overlap on 10% of their opportunities.
- Two of my channel partners have marked the same company as an opportunity.

On its own, this information can help steer you toward high-level decisions like which partners are the most valuable (more on that on page 29). But it gets especially interesting and valuable when you analyze the actual accounts inside these overlap lists. Each intersecting account is an opportunity for value-creating action. You can visualize the different actions you can **Execute** from this **Source** step in a 3x3 grid.

	Partner's Customers	Partner's Opportunities	Partner's Prospects
Your Customers	Build a tech integration, case studies	Give partner warm introductions/ context	Collect referral revenue
Your Opportunities	Get warm introductions / context from partner	Solution selling, co-marketing	Co-selling, co-marketing
Your Prospects	Get warm introductions / context from partner	Co-selling, co-marketing	Co-selling, co-marketing

In this grid, each row represents one of your account lists, and each column represents an account list from your partner. The boxes in the middle show actions you can take when those specific lists overlap.



**Example #1:** I compare my customer list with my partner's customer list and we find a high number of overlapping customers (the upper left box). As a result, we **Decide** (more on deciding on page 28) to build a new technology integration. We know exactly which customers to contact and market the integration to, and, once adopted, the integration helps increase user retention for both of us. Account mapping made our product roadmap smarter, our products "stickier," and our partnership stronger.

**Example #2:** I compare my open opportunities list with my partner's open opportunities list. We find that we have a very high number of overlapping opportunities in the northeast region of the U.S. So, we connect our respective sales reps who cover that region and they use the account mapping results to share insights and co-sell into these shared opportunities (more on that on page 76, too). We increase each other's chances of success and close rates by telling a unified story about how our products create value together. Everyone wins and our partnership grows.

### The old way to do account mapping

In the 2010s, comparing data sets with partners was done ad hoc and manually via spreadsheets, bespoke integrations, or just phone calls and dumb luck.

This approach is flawed for several reasons:

- **It's inaccurate.** Are your account names spelled differently? Do you list a parent company while your partner lists a subsidiary? Do the web addresses in your CRM point to different sites for the same business? There is an astronomical rate of false negatives that makes manual comparisons yield disappointing results.
- **It's incredibly time consuming.** For sizable partner ecosystems with large data sets, account mapping can easily be a full-time job.
- **It's not secure.** NDA or not, most companies are extremely uncomfortable sharing full account lists or sales pipelines. But in order to map accounts the old way, one side has to give up their data first. Once you send that spreadsheet to your partner, you have no control over where it goes. In the era of GDPR and CCPA, this can make account mapping a non-starter.
- **It's instantly out of date.** The moment the spreadsheet is exported, it is frozen in time. You can only get up-to-date data on your partnerships by starting over.

## Indispensable Tactics: Source



Swapping spreadsheets can also lead to what we call “The Partner’s Dilemma.” Like its namesake the Prisoner’s Dilemma, the Partner’s Dilemma is when two partners are locked in a stalemate as to who should send the spreadsheet and who should do the mapping. After all, by sending the spreadsheet you are sharing all of your data with your partner, who only needs to share the overlapping data back with you.

### Account mapping like a modern partner professional

Being a modern partnership professional means you can be smarter about your partner operations (a.k.a. **Ecosystem Ops** — a repeatable set of practices for working with stakeholders and scaling your partner program). Use technology to meet your partner program’s needs at scale — all while protecting your company’s most sensitive data.

Modern teams use a partner ecosystem platform (PEP). A PEP will connect your lists securely and keep you constantly up-to-date on any changes. Rather than manually sourcing and analyzing spreadsheets with each partner, you can set up the connection once and forget it.

Most importantly, a PEP serves as a trusted third party that can securely manage account lists and reveal overlaps while keeping the rest of your data private and secure. It’s kind of like an escrow service for your account data.

You cannot operate efficiently as a partner professional if your team relies on spreadsheets to map accounts. Partner managers using Crossbeam have shared that they save 20 hours or more each week by no longer account mapping manually — all while getting fresher and more accurate results.

“We’re running and gunning now, and it’s a lot faster without these 10,000 pound jackets on which are spreadsheets,” says Ryan Klekas, Director of Channel Partnerships at Bombora.



Need help making the case for partnerships tools? Download our free ebook **“How to Buy a Partner Ecosystem Platform”** and get the 10-step process used by SaaS leaders like Braze for buying new software.

## Indispensable Tactics: Source



As a result, a PEP changes your account mapping from an unsecure, static process into a secure, dynamic process. And that opens up lots of opportunities to streamline your Ecosystem Ops. For example, you can:

- Send your account mapping data to **Salesforce** so your sales reps can see which partner they should reach out to when trying to close a deal.
- Send alerts about new overlaps to **Slack** so you are instantly notified about new opportunities to collaborate with your partners.
- Use your **PEP combined with your CRM** to track **partner-influenced pipeline** and revenue as deals close.

None of the above is possible with spreadsheets.

"Before, I had to go into multiple accounts on spreadsheets, I wasn't sure how fresh the data was and it was just a pain. Now, I run a report. I know [the data] is fresh. And boom – I have the accounts that I can focus on, and I know exactly what I'm going to do with my time," says Klekas.

### We agreed to map accounts. Now what?

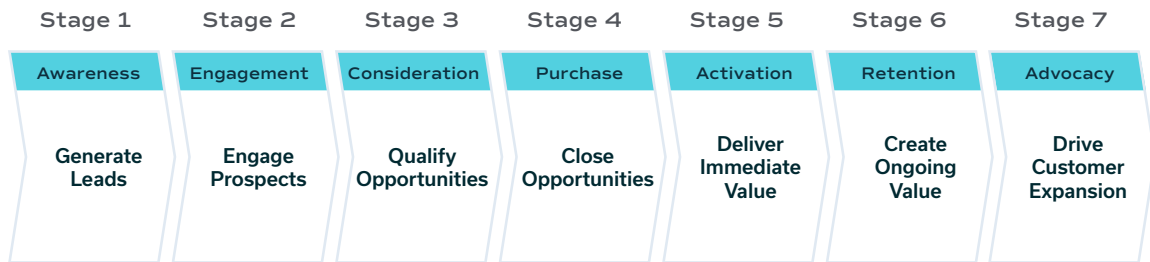
You've agreed to share data using a PEP. So, um, what do you do now? When and where is your partner data most powerful?

Because real-time account mapping is a relatively new tactic, you're likely sitting on lots of untapped potential. Your partner data needs to find its way to the right hands (or internal team members) that can set the right plays into motion. To get the complete picture of what's possible, choose your account mapping strategy based on your needs in the **customer lifecycle**. To determine those needs, listen to your team's challenges and goals so you can operationalize them with the best partnership tactics.

Choose the motion that will benefit your team and impact your business the most.

For example, if your team's biggest pain point is top of the funnel or the "awareness" stage of the journey – read on to Stage 1. But if the bottom of the funnel or "Activation" is more of your strategic focus, head to Stage 5.

## Indispensable Tactics: Source




### Stage 1: Awareness

#### Map Accounts to Generate Leads

The goal: Getting ecosystem qualified leads (EQLs – or net new leads that come directly from your partners) from your partner ecosystem to grow pipeline.

The tactic: Map accounts between your:

- Prospects and your partner's prospects

	Partner's Customers	Partner's Opportunities	Partner's Prospects
Your Customers	Build a tech integration, case studies	Give partner warm introductions/ context	Collect referral revenue
Your Opportunities	Get warm introductions / context from partner	Solution selling, co-marketing	Co-selling, co-marketing
Your Prospects	Get warm introductions / context from partner	Co-selling, co-marketing	Co-selling, co-marketing



## ● Indispensable Tactics: Source



If there's a high overlap count and/or if a shortlist of your most strategic target accounts overlap – consider a co-marketing play. You and your partner are targeting similar accounts, and you'll be more likely to engage these and lookalike audiences by inviting them to co-hosted webinars with your partner or creating thought leadership content the account is likely to be interested in (and maybe put some ABM-style ad targeting behind that content, eh?).

**Who else should account map:** Consider enabling your marketing team and outbound sales team to own or support account mapping at this stage.

### ● Stage 2: Engagement


#### Map Accounts to Engage Prospects

**The goal:** Getting more information about your EQLs and kicking off the sales cycle.

You're teaming up with your marketing team and sales team to bring your prospects into a sales conversation. At this stage, you want to find out as much as you can about your prospects to approach the conversation thoughtfully – and, luckily, some of your partners are in a position to help you close the knowledge gap.

**The tactic:** Map accounts between your:

- Prospects and your partner's opportunities
- Prospects and your partner's customers

	Partner's Customers	Partner's Opportunities	Partner's Prospects
Your Customers	Build a tech integration, case studies	Give partner warm introductions/ context	Collect referral revenue
Your Opportunities	Get warm introductions / context from partner	Solution selling, co-marketing	Co-selling, co-marketing
Your Prospects	Get warm introductions / context from partner	Co-selling, co-marketing	Co-selling, co-marketing

## Indispensable Tactics: Source



If you have overlaps between your “prospects” and your partner’s “**opportunities**,” you can:

- Ask your partner for more context about the account (e.g. who the stakeholders with the most buying power are or what their budget looks like)
- Ask your partner about selling a joint solution together through a co-selling motion
- Ask your partner to include your solution as part of their request for proposal (RFP), if applicable
- Develop a co-marketing campaign with your partner to engage your mutual target accounts through a co-hosted webinar, a blog swap, and other **co-marketing motions**

If you have overlaps between your “prospects” and your partner’s “**customers**,” you can:

- Ask for an intro into the account
- Ask your partner for a referral (Your prospects may trust the word of their customer success reps at the partner company and be interested in how your product can provide them with more value)
- Ask your partner to educate the prospect about various use cases for using your products together and the success stories they’ve seen
- Consider developing an integration to attract more of your partner’s customers who may be interested in using your products together
- Have your sales team reference integrations specific to their prospects’ tech stacks in their sales outreach

“You’re using the network effect of your partners to create more confidence for the prospect as they’re evaluating your solution,” says Ashley Hildreth, VP of Business Development and Partnerships at Clyde.

Social proof is real. Strengthen your credibility through the familiar voice of your partner.

“A partner who agrees to you listing them as a reference is definitely influencing the deal,” says Corinne Bartow, Director of FinTech Partnerships at MX.

## ● Indispensable Tactics: Source



"This allows us to pre-determine what technology [the freemium account] is already using, so when we go outbound and we reach out to them or we have the partner reach out on our behalf, we're reaching out with so much context as to what technology they're using and why we fit into that equation really well, and that results in higher response rates," says Alyshah Walji, Strategic Partnerships Development Manager at Vidyad.

Walji says the online video software company's reps saw roughly a 20% increase in response rates when referencing a piece of a prospect's tech stack in an outbound message to their freemium users.

Alyshah says the online video software company's reps saw roughly a 20% increase in response rates when referencing a piece of a prospect's tech stack in an outbound message to their freemium users.

Your **partner's influence** can make all the difference between a prospect going dark or requesting a demo (note: a partner-influenced deal is when a partner helps you advance or close an existing deal in your pipeline).

**Who else should account map:** Consider enabling your marketing team and outbound sales team to own or support account mapping at this stage.

### ● Stage 3: Consideration Map Accounts to Qualify Opportunities


**The goal:** Graduating your prospects to qualified opportunities ready to buy.

Your partner can help you turn your prospects into qualified opportunities in an active deal conversation – but you should be tactical when considering which accounts merit partner involvement. Not all partners are created equal, and your partner's time is valuable.

**The tactic:** Map accounts between your:

- Shortlist of strategic prospects and your partner's customers



	Partner's Customers	Partner's Opportunities	Partner's Prospects
Your Customers	Build a tech integration, case studies	Give partner warm introductions/ context	Collect referral revenue
Your Opportunities	Get warm introductions / context from partner	Solution selling, co-marketing	Co-selling, co-marketing
Your Prospects	Get warm introductions / context from partner	Co-selling, co-marketing	Co-selling, co-marketing

The resulting overlaps will show you which accounts your partner has the most influence in helping you close.

**Who else should account map:** Consider enabling your outbound sales team to own or support account mapping at this stage. Your outbound sales team can also take advantage of [Crossbeam's Chrome Extension](#) to see partner overlap data directly in their browser while prospecting. They'll know exactly which partners can help them qualify an opportunity at any given time.

● **Stage 4: Purchase**  
**Map Accounts to Close Opportunities**


**The goal:** Driving revenue.

**The tactic:** Map accounts between your:


- Prospects or opportunities and your partner's opportunities
- Prospects or opportunities and your partner's customers

## Indispensable Tactics: Source



	Partner's Customers	Partner's Opportunities	Partner's Prospects
Your Customers	Build a tech integration, case studies	Give partner warm introductions/ context	Collect referral revenue
Your Opportunities	Get warm introductions context from partner	Solution selling, co-marketing	Co-selling, co-marketing
Your Prospects	Get warm introductions / context from partner	Co-selling, co-marketing	Co-selling, co-marketing

If your target accounts overlap with your partner's "**opportunities**" list, ask your partner about teaming up to pitch your joint solution to the account.

	Partner's Customers	Partner's Opportunities	Partner's Prospects
Your Customers	Build a tech integration, case studies	Give partner warm introductions/ context	Collect referral revenue
Your Opportunities	Get warm introductions / context from partner	Solution selling, co-marketing	Co-selling, co-marketing
Your Prospects	Get warm introductions / context from partner	Co-selling, co-marketing	Co-selling, co-marketing

## Indispensable Tactics: Source



If your target accounts overlap with your partner's "**customers**," ask your partner for:

- Context about the account (like relevant stakeholders with power over budget)
- A referral
- An introduction to a key decision-maker at the account
- Their subject matter expertise and help educating the account about your product and various use cases the partner's other customers have seen success in

**Who else should account map:** Consider enabling your account executive (AE) team to own or support account mapping at this stage.


### ● Stage 5: Activation

#### Map Accounts to Deliver Immediate Value While Onboarding New Customers

**The goal:** Driving adoption, retention, and renewal.

**The tactic:** Map accounts between your:

- New customers (according to a specified date range) and your partner's customers

	Partner's Customers	Partner's Opportunities	Partner's Prospects
Your Customers	Build a tech integration, case studies	Give partner warm introductions/ context	Collect referral revenue
Your Opportunities	Get warm introductions / context from partner	Solution selling, co-marketing	Co-selling, co-marketing
Your Prospects	Get warm introductions / context from partner	Co-selling, co-marketing	Co-selling, co-marketing

## ● Indispensable Tactics: Source



The resulting overlaps will show you which tools exist in your newcustomers' tech stacks. Use this data to accelerate the time to first value (TTFV) for your new customers by determining which integrations relevant to their respective tech stacks would be most likely to help those customers achieve their business goals.

"To unlock more value for our customers in the early days makes so much sense," says Erez Suissa, Senior Manager of Adoption and Onboarding at RollWorks. "I'm a firm believer that customers have a lifecycle, and the onboarding role is not to do everything under the sun, but it's for us to basically help the customer realize the immediate value. We need to unlock that as quickly as possible for them."

Remember: you're making recommendations for the best integration(s) your customers should adopt *right away* – not all of the integrations they should adopt throughout their customer journey. Consider recommending other integrations in "Stage 6: Retention."

"Why don't we start getting the right accounts to the customer's website right now?" says Suissa. "It helps us drive the engagement to get the customer to do what's good for them. Having that information up front empowers the onboarding team during those conversations."

Using this account mapping technique, RollWorks saw a **17% boost in integration adoption**.

**Who else should account map:** Consider enabling your onboarding customer success team to own or support account mapping at this stage.

### ● Stage 6: Retention

#### **Map Accounts to Deliver Ongoing Value to Your Customers**

**The goal:** Driving adoption, and thus retention and renewal.

Never stop account mapping. Wake up and map accounts. Go to lunch and then map accounts. Go to sleep and map accounts.

Just kidding.


## Indispensable Tactics: Source



With a PEP, you can have real-time account mapping with notifications and alerts to let you know when new overlaps exist. Just run a report and then watch the overlaps roll in.

**The tactic:** Map accounts between your:

- Customers and your partner's customers
- A shortlist of your customers most likely to churn and your partner's customers

 Your Customers	Partner's Customers	Partner's Opportunities	Partner's Prospects
Your Customers	Build a tech integration, case studies	Give partner warm introductions/ context	Collect referral revenue
Your Opportunities	Get warm introductions / context from partner	Solution selling, co-marketing	Co-selling, co-marketing
Your Prospects	Get warm introductions / context from partner	Co-selling, co-marketing	Co-selling, co-marketing

The resulting overlaps will give you a window into each of your customer's existing tech stacks. Use this data to continue making integration recommendations to your customers depending on their changing business needs.

Mapping a subset of customers who are most likely to churn with your partner's **customers** can illuminate next steps for encouraging those customers to renew like:

- Developing an integration that would increase the value they're getting from your product
- Improving an existing integration to satisfy the specific customer's use cases
- Or educating those customers about existing integrations that can help them get more value if they adopted them



## ● Indispensable Tactics: Source



This is also an opportunity to drive upsells. Look for opportunities to create and improve functionalities for the integrations your customers are using.

**The tactic:** Map accounts between your:

- Long-standing customers your team has the best relationships with and your partner's customers

The resulting overlaps are the accounts you should look to for integration feedback and may be most interested in adopting new features and integrations.

**Who else should account map:** Consider enabling your customer success team to own or support account mapping at this stage.

### ● Stage 7: Advocacy

#### Map Accounts to Expand Accounts Through Upselling and Cross-Selling

**The goal:** Expanding the account through integration adoption, upselling, and [cross-selling](#).

You've achieved "stickiness" and loyalty among your customers – now it's time to provide them with more value through additional product functionalities, integrations, and complementary products or services. Look for opportunities to create and improve functionalities for the integrations your customers are using.

**The tactic:** Map accounts between your:

- Shortlist of long-standing customers your team has the best relationships with and your partner's customers



## Indispensable Tactics: Source



In this case, the resulting overlaps are the accounts you should look to for integration feedback and who may be most interested in adopting new features and integrations.

Map your “customer” list to multiple partners’ “customer” lists to identify which tools exist in your customers’ tech stacks that those customers didn’t use previously or which integrations they simply haven’t adopted yet.

Keep driving these numbers up by aligning with:

- Your **marketing** team and your partner’s marketing team to evaluate, pivot, and expand your co-marketing strategy to educate your customers about new products and functionalities that can help expand existing accounts
- Your **customer success** team to identify product gaps your existing integration (or a new integration) could help fill for specific customers and anticipate those customers’ needs throughout the customer lifecycle for upselling and cross-selling
- Your **product** and **engineering** teams to identify opportunities for charging for additional functionalities within your existing products or creating complementary products

The more loyalty your customers have towards your brand, the more likely they’ll be interested in what else you have to offer. Account map to anticipate opportunities and meet your customers’ needs *earlier*.

**Who else should account map:** Consider enabling your customer success team to own or support account mapping at this stage.

At the Advocacy Stage, a new version of the sales cycle begins again. Only this time, you’re identifying value-adds for your customers. Account mapping can help you steer the conversation thoughtfully by having the best recommendations for adding value to your customers’ current product usage or tech stacks.



### But wait, my partner is reluctant to share their data

If you're using a PEP, lean on your customer success team to help you communicate the value, onboarding requirements, and security, privacy, and compliance of the PEP platform you are using. Another route? Brag to your hesitant partners about the results you've seen so far.

A low friction way to kick off a partnership is to agree to do some account mapping in your PEP and share **only the number of overlaps**, but not the contents of the accounts within those overlaps. This means, for example, you can see that 41% of your customers are also their customers, but not reveal who those customers are or anything else about those accounts.

By starting with high-level overlap counts, you'll get a sense of the size of the opportunity if you were to partner. You can use this high-level data to compare against the overlap counts of other partners and vet the potential partnership.

An example: You and your potential partner Lindros and Co. use your PEP to do an account mapping exercise. You learn that Lindros and Co. has 2,100 customers on your target list they could potentially introduce to you. Your average deal size is \$25,000. What's that worth to you? Just do the math:

Opportunities with Lindros and Co. :	2,100
Introduction to demo conversions rate	25%
Possible demos	525
Demo to deal conversions rate	25%
Possible deals	131 new opportunities created
<b>131 new opportunities x \$25,000 [average deal size] = \$3,275,000</b>	

A partnership with Lindros and Co. has an immediately addressable market of \$3,275,000 in pipeline. And that's just today – as your target list evolves and your partner's customer list grows, a steady stream of incremental opportunities will emerge. Consider how accessing these opportunities through your partner will satisfy your **KPIs**, drive sales, and improve retention and renewals for your business.

## Indispensable Tactics: Source



Many mature partner programs, such as Zendesk's, use this technique to quickly determine if a potential partnership is worth pursuing.

You should also get more granular and compare overlaps between shortlists of strategic accounts and your partner's customers. For example, if a potential partner has several of your most strategic target accounts as customers, that partner can open the doors for you and unlock growth opportunities for your company. Think quantitatively and qualitatively.



## Indispensable Tactics: Decide

### DECIDE



Once you've completed your account mapping exercise and **Sourced** the right data, you can **Decide** which partners you'll work with and what problems you'll be solving. You've got the overlaps. So what partnership motion should you pursue first? It's important to make sure we **Decide** on the right motion with the right partner before we **Enable** and **Execute**.

### Vetting possible partnerships

What you do next depends on the data you sourced from your partners in the previous section as well as your individual goals. You can think of a partnership formula as:

$$\text{Available shared data} + \text{What your company needs} + \text{What their company needs} = \text{Partnership plan}$$

After account mapping we have the "available shared data" part covered.

Let's recap:

If the metric you care the most about is...	You should map your...
Ecosystem qualified leads (EQLs)	Prospects and your partner's prospects
Lead engagement	Prospects and your partner's opportunities OR Prospects and your partner's customers
Qualified opportunities	Shortlist of strategic prospects and your partner's customers
Customer conversions	Prospects or opportunities and your partner's opportunities OR Prospects or opportunities and your partner's customers
Time to first value (TTFV), number of integrations adopted	New customers (according to a specified date range) and your partner's customers
Retention, renewals	Customers and your partner's customers OR A shortlist of your customers most likely to churn and your partner's customers OR A shortlist of long-standing customers your team has the best relationships with and your partner's customers
Account expansions, retention, renewals	A shortlist of long-standing customers your team has the best relationships with and your partner's customers

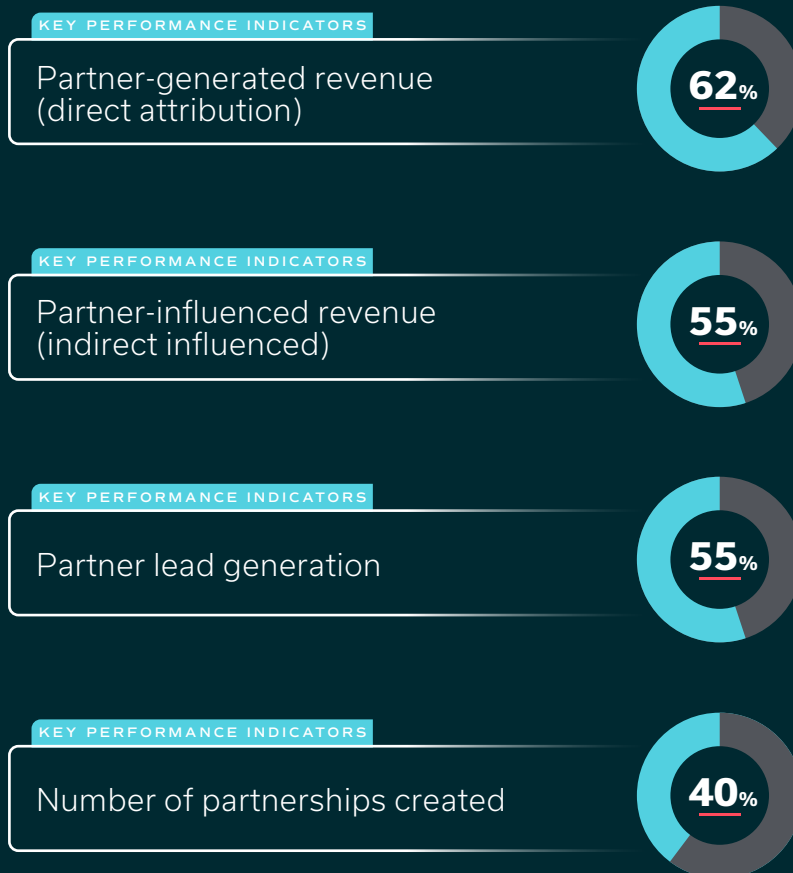
## Indispensable Tactics: Decide



With the above quantitative partner data in hand, it's now time to get qualitative and tackle the "what your company needs" and "what their company needs" variables.

"It all depends on the goals," says Cody Jones, Head of Partnerships Alliances at Zapier. "Some companies care about lead generation. Some just care about reducing churn. They all have their metrics that they are evaluating your partnerships by. Know that upfront."

### Common Partnership KPIs.



### Getting alignment: 7 questions you should be able to answer before executing any partnership

There are less-measurable aspects to partnerships to ensure alignment before inking a formal partnership agreement. Have these questions in your back pocket before and during your initial discovery call with a potential partner.



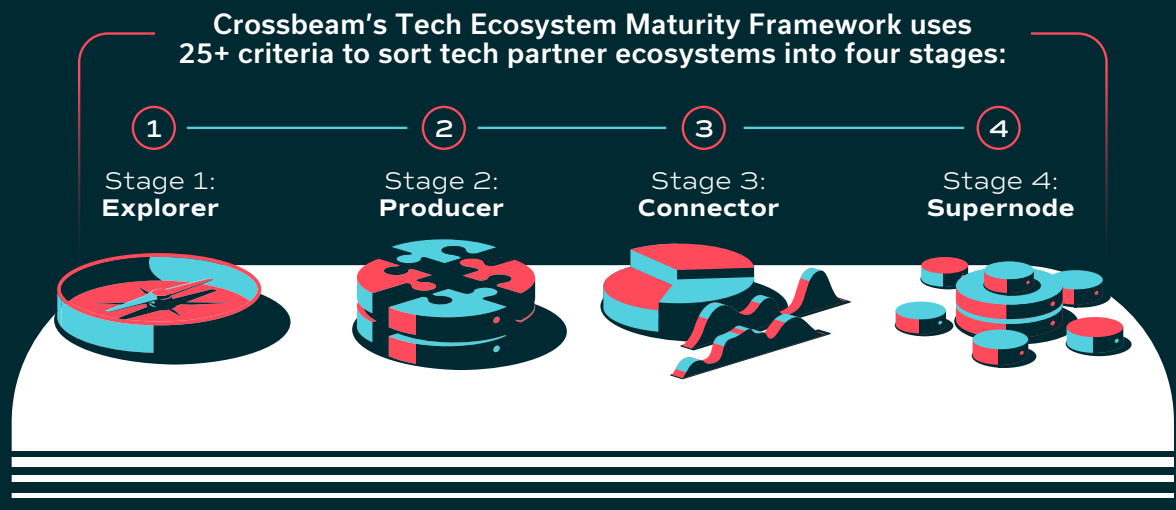
### Question #1: Do your ideal customer profiles (ICPs) overlap?

An ICP is a combined list of factors that describe a prospect who is the best fit for your company's product and/or services. Prospects that match your ICP have a high likelihood of converting and yielding a high return on investment (ROI). Determine if your partner's target companies have a similar budget, company size, and tech stack as your target accounts — if so, you could help each other close a high percentage of deals — or even break into new markets.

"Being able to very clearly see a partner's customers that overlap with our ideal customer profile list is very important. And in Crossbeam, it's really simple," says Ryan Klekas, Director of Channel Partnerships at Bombora.

### Question #2: Does your potential partner fit into your ideal partner profile (IPP)?

Different partners serve different purposes. Determine the factors that fit into your IPP for each of your partnership categories — **channel**, **technology**, and **strategic** — and operationalize your team with a scoring system for quick "yeas" or "nays."





### Question #3: Do you and your partner have a similar level of tech ecosystem maturity?

For example, a company in the “Explorer” phase of tech ecosystem maturity – in the beginning stages of kicking off its partner program and still in the discovery phase for determining processes for co-selling and co-marketing – likely has few resources dedicated to partnerships, less time to commit as a one-person partnerships team, and KPIs based on specific objectives.

Engaging an “Explorer” in a long-term co-marketing commitment is most effective if you’re one of just a handful of their partners and if you’re able to commit your *Ecosystem Ops* (effective partner program practices, processes, and frameworks) to guide the best results.

Need a temperature read on whether or not your partner’s in a similar partner program maturity phase as yours? Greg Unruh, Director of Partner Strategy and Channel Sales at Shipware and Consultant at Partnernomics, uses a *term sheet* to put the partnership discussion to paper prior to signing an official contract. The term sheet helps Unruh and his partners define the business case for the partnership, outline the expectations, and identify potential roadblocks (like a lack of leadership buy-in).

Some sections to include in your term sheet:

- Involved parties
- Business stakeholders
- Summary of partnership
- Client opportunity
- Partnership opportunity
- What does each party hope to gain from this partnership?
- Partner agrees to do X
- You agree to do Y





"A lot of times when you get into a partnership discussion, the first thing that happens is you toss back and forth a mutual NDA, which is part of due diligence," says Unruh. "And then you start sharing agreements. And all of a sudden, you're trying to navigate legal language and figure out 'What is the business intent of this partnership? Where are we going with this?'"

A term sheet can act as the agreement before the legal agreement, a chance to squash anything that may derail a partnership.

### **Question #4: Will your team have the bandwidth and enablement resources they need to sell your partner's product or promote your joint solution?**

Learn about your partner's enablement process and consider factors like the size of your sales team, the knowledge your team has of your partner's category thus far, and others that could help or hinder the partnership's success.

"Know your partner's business," says Connor Remaley, Director of Global Partnerships at Greenlight Guru. "If you were running their business, what vision would you have for them? That's how we work to build the engagement that we're going to have with partners. You're going to build more loyalty. You're going to build trust, and then you're also putting more materials in front of them for them to speak to knowledgeably about your product."

### **Question #5: Will your partner's team be able to learn about your business in a way that benefits you?**

Consider your own enablement process, and determine if your partner is willing to put in the time and work to get their sales and marketing teams up to speed. It's a two-way street. (Learn about Vidyard's four-phase approach to enabling partners on page 38 and WP Engine's bow-tie funnel for tracking the partner journey on page 41).

### **Question #6: Can your partner establish your company's position in the ecosystem?**

*Ecosystem is everything.* Just ask Crossbeam's CEO, Bob Moore, who wrote about his [\\$2.6 billion ecosystem fail](#).



RJMetrics, Moore's previous company, had a four-year head start on its competitors, including business intelligence software company Looker. But fast forward, and Looker gets acquired by Google for \$2.6 billion while RJMetrics gets sold for a dramatically lower sum. So, how did Looker get ahead? Looker prioritized growing its partner ecosystem, while RJMetrics operated in a silo.

Your partners serve as a powerful channel for accessing new EQLs, your target accounts, and even new markets. Consider how a potential partner's existing ecosystem can help your brand stand out among your competitors, drive "stickiness" for your product, and stamp your brand into the minds of more partners and *more customers*.

### **Question #7: Does your partner have the resources to execute?**

For example: if they're developing an integration with your product, do they have the dev team resources to make it happen in the timeframe you discussed? And how's that API looking?

Or, if you're developing a quarter-long co-marketing campaign, is your partner's marketing team able to carry their weight in addition to managing other projects? Does their marketing team have the budget and bandwidth to fulfill the vision you and your partner are discussing? Having these conversations up front will help you anticipate possible conflict, avoid a sticky situation, or form a creative solution to a would-be conflict together.

### **Vetting new technology integrations**

One of the most common partnership motions is developing an **integration**. Let's review how the "**Decide**" framework can apply here—and what questions you'll need to ask for your chosen partnership motion.

*Available shared data + What your company needs +  
What their company needs = Partnership plan*



Again, because of account mapping we have a good handle on the “available shared data.” But with integrations it’s best to do another vetting process for API availability.

- **Make sure you have the necessary APIs and resources to get the integration done.** Does your product team have dedicated integration developers? If not, can members of your product team afford to spend their time developing an integration? Do you and your partner have the appropriate APIs to develop the functionality your integration would need? These are important questions to test your integration chemistry and a good way to cut out unnecessary tech partnerships or plan ahead to fit them into your integration roadmap further down the line.

With account mapping and API availability answered, you can now explore “What your company needs + What their company needs”:

- **Gather feedback and integration wishlists from customers your team has a close relationship with.** Of your joint customers, who would benefit most from the integration? Of those customers, who do your customer success, sales, and partnerships team have the best relationships with? Look to these customers for insights on how your integration could solve existing product gaps or workflow challenges.

Continue getting feedback from your customers throughout the development process to make sure you’re on the right track.

- **Determine the joint use cases for using your product and your partner’s product together.** Use customer feedback, survey responses, product requests, and more data to determine which use cases would be most beneficial to solve. Augment your data with public resources like **Forrester**, **G2**, **Owler**, **Crunchbase**, and **CB Insights** to get additional context.
- **Determine the minimal viable product (MVP) integration** — essentially, the integration that will solve product gaps and provide the most value to your users while not being overly resource intensive.

If you work at a startup or mid-sized business, chances are your team will be the one creating the integration — so make sure you’re using your team’s resources wisely. You’ll want to determine how to develop the most valuable integration with the smallest lift from your team and your partner’s team. Keep in mind that you can continue to expand the integration’s functionality in the months and years after launch.



- **Your MVP integration should solve product gaps for a large portion of your customers and/or your most strategic customers.** Analyze your feedback from customers, research from G2 and other sources, your dev resources, and the dev resources of your partner to determine the best MVP integration.

"It's up to us to select what makes sense to build on behalf of our customers, and we found that the Ads Optimization Events tool was the most valuable thing that we could do for our customers," says Christen Luciano, Senior Manager of Strategic Partnerships at HubSpot.

- **Identify potential early adopters.** These will likely overlap with your customers from step one, and they should — you've been building up an integration, so let them try it! Get early feedback from these customers so that you can build more functionalities into your integration's product roadmap. These are also the customers you can look to for partner case studies when it comes time for your public launch. Partner case studies require the participation of your customer and your partner to show the value your customers get when using your integration.

"We called a bunch of them and asked, 'Would you want to pilot the integration and use it before anyone else, and be a beta tester?'" explains Shay Howe, VP of Platform Strategy at ActiveCampaign. "And also, 'How do you want to use it? What are you doing today to try to connect data across these tools? How do we make that easier?'"

### The Okta Integration Vetting Framework

If you're looking for a super-streamlined vetting framework, identity cloud provider Okta looks to their integration partners to fulfill three boxes:

1. **Does the integration extend our product?** — as in, does the integration create new functionalities Okta didn't have previously and fill gaps in its current product offering?
2. **Does it help us sell?** The right integration partners help Okta become a seamless part of its prospects' tech stacks — making Okta a no-brainer of a purchase.
3. **Does it "change the game?"** — meaning, does the integration help Okta come out ahead of its competition, circumvent potential threats or industry changes, and enter new markets?

## Indispensable Tactics: Enable

### ENABLE



The success of your partner program relies on the success of your partners and your internal teams. Traditionally, the word “partnership” represents a relationship between two people – but you know more than anyone, it takes a village to be successful.

Before you execute the partnership motions in the **Execute** section, make sure your team and your partner’s teams are willing and able to help.

“No matter whether you have two people or ten people on your team, they can’t do all of the work,” says Stanley Anderson, Senior Director of Strategic Alliance Partnerships at Rackspace. “You need an army of other resources actively engaged in supporting your division and its capabilities.”

Each partnership stakeholder needs to believe in the power of your partnerships and should be contributing their individual time and resources enthusiastically to the cause. This buy-in will produce ongoing results that everyone can be proud of.

Like anything else in partnerships, your enablement approach should be revisited time and time again – as your partner program grows, your team grows, and more specialized use cases come into play.

In this section, you’ll learn tactics for:

- [Enabling Your Partners](#)
- [Enabling Your Sales Team](#)

### Enabling Your Partners

To fuel ongoing success, your partner and their teams need to get up-to-speed on your product and services as quickly as possible and long into the future.

## Indispensable Tactics: Enable



"We call it 'enablement as a product' because it's continuous and you're always going to have to iterate on the process because things change so often," says Tony Gilharry, Senior Manager of Partnerships at WP Engine.

"Our partner's success is our success. When partners fail, we fail. When partners get paid, we get paid. When they don't get paid, we don't get paid. We're so intimately tied into everything they do and all their KPIs." says Aleksi Mattlar, Partner Development Manager at Vena Solutions.

For example:

- Your partner's sales team needs to know how to position your product, joint solution, or integration properly in their sales conversations.
- Your partner's marketing team needs to know which products or services are relevant to specific prospects to target their messaging properly in paid advertising, blog content, and other collateral.
- Your reseller partner and their sales team needs to know how much is expected of them as you begin your partnership and how much is expected of them as your partnership achieves certain benchmarks (e.g. you expect your partner to produce 20 additional leads per quarter after they successfully close their first five deals).
- Your agency partner's client services team needs to know about specific use cases that have proven successful for specific client types and how to implement existing and new functionalities in your product.

"[Enablement] means so many different things to so many different people, and that includes internal stakeholders and external stakeholders," says Gilharry.

In many cases, your partners need to grow their expertise in your products or services to deliver the results your customers are looking for.

In this section, you'll learn about:

- [Vidyard's 4-phase approach to enabling partners](#)
- [WP Engine's 7-stage "bow-tie" funnel for streamlining the partner journey](#)

## ● Indispensable Tactics: Enable



### A 4-phase approach to enabling partners

*This partner enablement approach is from Will Taylor, Partner Enablement Manager at online video platform Vidyard.*

By using this approach, Vidyard streamlined its agency partners' adoption and implementation of its online video platform and boost agency partner retention by 70%. Furthermore, through real-time account mapping, Vidyard increased its overall **partner program revenue by 25%!**

**Best for:** Launching a new partner enablement program from the ground up and setting yourself up for success.

#### ● Phase 1: Discovery

Get to know your partner, and help your partner get to know you. Host a kick-off meeting between:

- Your channel account manager
- Your partner enablement manager
- Your partner's team members responsible for implementing your product for your mutual customers

Use the meeting to:

- Explain your business objectives, priorities, and product roadmap to your partner
- Broker introductions to relevant stakeholders on your team
- Set expectations about individual and shared responsibilities for your team and your partner's team
- Assign initial tasks to internal team members and your partner's team members (like completing certification courses or sharing co-selling collateral)
- Set goals and milestones for your partner to hit



## Partnership Goals & KPIs

Top three business goals as they relate to your marketing use case of the Vidyard Platform

	YOUR BUSINESS GOALS	PRIMARY OUTCOMES	METRICS OF SUCCESS	POTENTIAL CHALLENGES
1	Product Goals	•	•	
2	Partnership Goals	•	•	
3	Business Goals	•	•	

*The partnership goals & KPIs template from Vidyard's partnership kick-off deck*

- **Phase 2: Platform setup, rollout, and user training**

Lead one-to-many Zoom training sessions to get your partner's team up to speed. Encourage question-asking from your partner, and check product usage data to identify where your partner might need more exposure. Focus these conversations around your partner's abilities and challenges thus far, as well as common use cases.

"We're making sure that they have the technical competence to use the platform for themselves because that will translate to being their own best use case," says Taylor. "It's not just 'Here's where you click,' it's 'Here's how you do this and here's the value of why you would do that or why a client would do that.'"

- **Phase 3: Analysis and evaluation**

Host one or two 30-minute sessions to evaluate the partner's platform adoption and their progress on goals. It's a good idea to host these meetings a month or so after the technical onboarding so you can tailor the conversation according to particular use cases your partner encounters while working with your mutual customers.



## Indispensable Tactics: Enable



### Phase 4: Service development

Help expand your partner's expertise in your product by educating them on your certification programs. You should also use this time to provide your partner with additional templates and custom co-marketing collateral to help them engage a wider breadth of customers.

Just imagine your partner's a player in your favorite video game, and you're putting all of the necessary items in front of them so they can use them in various scenarios they may encounter with a customer. They'll have exactly what they'll need to level up.

### How to measure the success of your partner enablement program

Defining your partner enablement metrics depends on your company's business model and objectives. But here's some food for thought. Measure:

- Your partner retention rate. Taylor says he's able to tie the dollar amount partners are making from selling complementary services to whether or not the partner is likely to renew their partnership agreement.
- Your net new, signed partners year-over-year
- Your time to first referral (or a similar type of value)
- Your partner-sourced revenue year-over-year
- The amount of opportunities your partners help your sales team close
- The average customer value over time or deal sizes associated with your partners

Or, measure the end-to-end partner journey for all of your partners. If you found yourself tensing up at the idea, it's probably because most people can't confidently say they have the partner journey down pat.

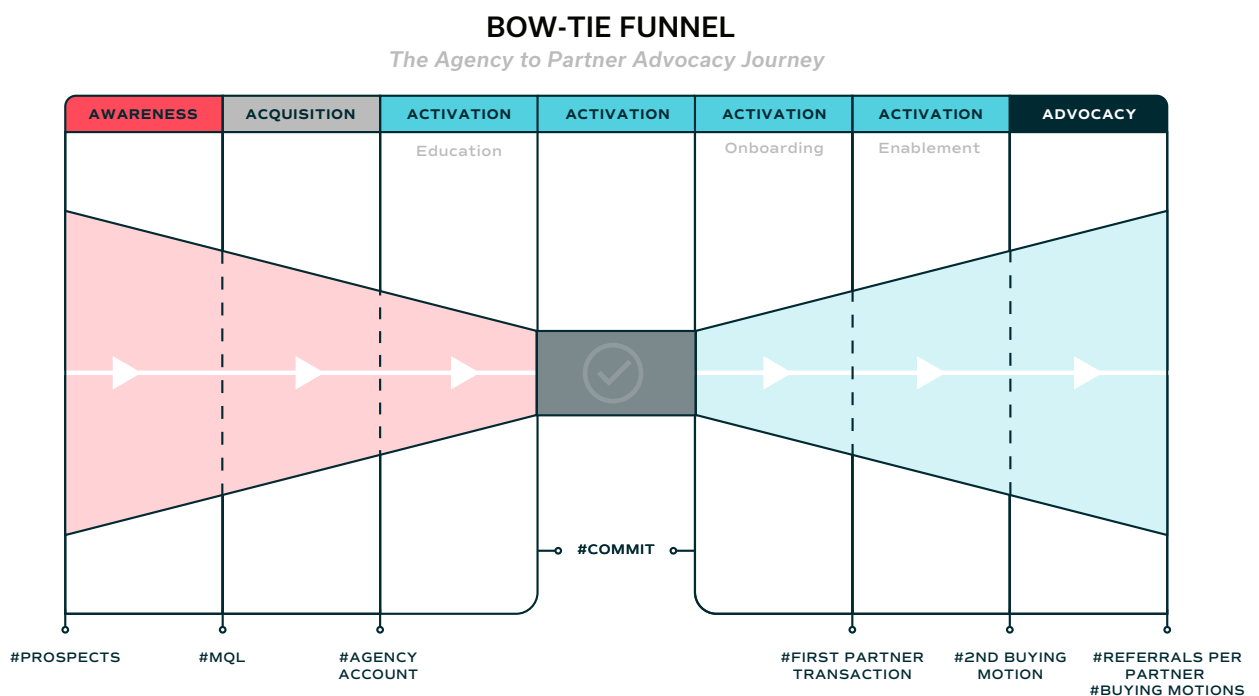
We've got a little something to tackle that challenge head on:



## The 7-stage bow-tie funnel for streamlining the partner journey

This *bow-tie funnel* is from Matt Irving, Senior Manager of Global Partner Programs and Strategy at the WordPress experience platform WP Engine.

By using the bow-tie funnel, WP Engine increased its signed partners by 50% year-over-year and reduced its agency partners' time to first referral from months to days. For context, WP Engine has more than 5,000 agency partners.



**Best for:** If you're looking for a funnel to call your own, this is it (a solid rival to the sales and marketing funnels, en garde!). For the mature partner program with a growing partnerships team, the bow-tie funnel can help you keep your partners on track for every step of the partner journey. Plus, your partnerships team will appreciate having this blueprint to guide them in, er, guiding your partners.

- Stage 1: Awareness**

This is where your prospective partners are. The goal for this stage is to graduate the prospective partners to the acquisition stage.

## ● Indispensable Tactics: Enable



To get your prospective partner moving through the bow-tie funnel, you can run a marketing awareness campaign that:

- Targets them through paid advertising
- Invites them to an event or webinar
- Shares other content like blog posts and reports to engage the prospects

WP Engine does not promote their partner program directly at this phase, but rather attracts prospective partners with educational content about its product to begin generating leads.

### ● Stage 2: Acquisition

Once you've started generating MQLs, you'll want to move the leads to the Education phase. WP Engine's goal is to get the MQL to sign up for a WP Engine developer account. Your goal might be to initiate a micro co-marketing motion to test the waters or have the prospective partner develop a no-frills integration through your API.

To hit your goal, use outbound tactics like:

- Emailing
- Cold-calling
- Inbound content marketing

Irving says that signing up for a developer account sends a signal that the prospective partner has interest in partnering.

### ● Stage 3: Education

Now that your MQL has taken an action signalling their interest in a partnership, it's time to nurture the opportunity. You should:

- Map accounts with your new partner to discover opportunities for co-selling, co-marketing, or developing an integration.
- Offer training sessions and educational collateral for your partner to learn about your product.

## Indispensable Tactics: Enable



### ● Stage 4: Commit (The “Knot”)

Now you know your potential partner is serious about teaming up. You’ve made your case to your leadership team (thanks, account mapping) that the result will glean results, and your partner knows what it will take to be a successful partner in your ecosystem.

Develop a partnership agreement and term sheet that outlines partnership expectations and responsibilities, and sign off!

In this stage, the WP Engine team measures metrics like win rate (the percentage of agency prospects becoming formal partners) and the number of days it takes for an agency to go from prospect to partner.

### ● Stage 5: Onboarding

To get your partner up to speed, provide them with the training, educational materials, certification programs, and tools they need to be successful. Keep in mind: there’s more time for enablement later in the partner journey, so keep it simple and make sure not to overload your partners with information they don’t need in the beginning. If you have dedicated partner account managers (PAMs), this is the time when your PAM should connect with the partner to begin fostering their relationship.

For WP Engine, the end goal of the 90-day onboarding period is for an agency partner to get its first partner transaction (or first referral), which can be a customer referral or an actual deal with a pipeline number attached to it. If the partner accomplishes this goal before the end of the 90-day period, they get accelerated to the next phase of the funnel.

### ● Stage 6: Enablement

Throughout this stage, provide more granular enablement trainings to grow your partner’s expertise in your product with the goal of:

- Increasing referrals
- Improving customer retention for your agency partners
- Driving sales (for reseller or co-selling opportunities)

## ● Indispensable Tactics: Enable



### ● Stage 7: Advocacy

This is the “level up” phase. WP Engine’s goal is to help its partners build muscle to regularly solve more advanced customer use cases. In this phase, it’s all about the momentum.

“If we can do one referral a week, then that is pretty much rockstar status. We’re looking for essentially four to five [referrals] per partner per month,” says Tony Gilharry, Senior Manager of Partnerships at WP Engine.

To maximize this phase, create more customized partner enablement training and support, and work with your partners to finetune your co-selling strategy.

By using the bow-tie funnel for every partner, you’ll know *exactly* where each partner stands at any given point in time. Additionally, by observing your partners’ progression through the funnel, their resulting successes, and their failures, you’ll discover sources of truth. Use the bow-tie funnel to analyze your partner journey and spot leading indicators of success.

### Extra Partner Enablement Tips

If you’re not ready to develop a partner enablement program like the bow-tie funnel just yet, that’s okay. Just start small.

**Create templates.** We’re talking actual templates like canned responses your partner can pass along to their sales team to fill in the blanks *and* templates that your team can easily customize to suit the needs of each individual partner. This is a great way to invest in Ecosystem Ops with a really light lift.

**Host one-to-one training sessions.** Host Zoom calls with your partners — especially resellers — to get them familiar with your product’s capabilities, co-selling messaging, product roadmap, and more. Develop training sessions that lay the groundwork at first and then future training sessions that dive deeper into specific use cases and more advanced product usage.

## Indispensable Tactics: Enable



"We run the sales training about personas and how to sell. We want that to be more of a conversation in order to see what synergies there are in our target markets or customer base," says Natalie Boone, Partner Account Manager at Greenlight Guru. "And then from there we have product training which is currently what our customers go through because a lot of these consultants are going to be in our software day in and day out."

**Host one-to-many training sessions.** As your partner program grows, hosting *one-to-one training sessions* will only be a scalable practice if your team grows, too. Start your partner off with an individualized training session at first, and then funnel your partner into a series of one-to-many sessions that they can opt into alongside your other partners. If you notice your partner is underdelivering, grab some time on their calendar to catch up.

**Lean on your successful partners as educators.** Help your partners share their learnings with your other partners. You can launch a forum or Slack community, invite partners with relevant use cases to a webinar based on their needs, or simply loop one partner into a conversation with another.

"You're not going to be able to answer every question and you're not going to be able to fit every use case," says Matt Irving at WP Engine.

Irving suggests asking yourself, "Are we the best people to answer these questions or can we develop an ecosystem of partners to kind of help them coach and train each other where we facilitate it?"

**Educate through your partner newsletter.** Send enablement tips to your partners' inboxes on the regular. Use your newsletter to share product announcements, integration updates, new use cases, and success stories. Make your newsletter super-skimmable so your partner gets a quick and painless powerboost.



On our blog:  
[10 examples of partner newsletters to inspire you](#)

## Indispensable Tactics: Enable



**Invest in a learning management system (LMS).** Unless your company has the development resources to create its own LMS, the fastest way to launch a certification program is by adopting an LMS like [360Learning](#) or [LearnUpon](#). You can train your partners in each part of your platform, helping them to level up their knowledge and share their accomplishments (à la their certification badge) on LinkedIn. Certification not only helps your partner become experts, it also helps them brag about their expertise and get more customers in the process.

"We created certification to formalize our partnership and provide the opportunity to the partner to say that they are Greenlight certified," says Natalie Boone at Greenlight Guru. "That's through two main courses in about five total hours of training."

**Adopt a "co-design" methodology.** Amir Karmali, Director of Partner Relations at Marketcircle, uses a methodology called [co-design](#) – which involves gathering requests and feedback from internal and external stakeholders to steer Marketcircle's partner program and create deliverables. One way that Karmali co-designed with his partners was to ask them what they thought their co-marketing materials should like.

"Here's the roadmap. Let's co-design again. I need you to tell me what resources you need," says Karmali. "I start working with my marketing team to design something and then I take that design back to my partners to validate that design."

Once Karmali had something to show his partners, he'd return to them to make sure he was on the right track. If not, he'd ask for more feedback in order to co-design the final marketing materials together.

Karmali adds that part of the value of co-designing is building relationships between various stakeholders. Enable your partners by giving them a say in the process from start to finish and providing them with support they can learn to trust.

"I was building a bridge between all my partners and my staff. That was really important because they needed to know that they could access these people. They needed to be able to say, 'These guys can support me,'" says Karmali.

## Indispensable Tactics: Enable



**Embrace the check-in meeting.** Don't be a ghost.

"We have about 150 partners in North America and I try to speak with at least 50 of them every month. It's important to maintain the pulse of what's going on with our partners," says Diane Schmidt, VP of Partner Development at Optimizely.

One of Schmidt's casual check-ins led to a joint marketing campaign and resulted in a referral for a new license sale in 2020.

"Those conversations are some of the most fruitful ones," says Schmidt.

### Enabling Your Sales Team

Picture this:

- You've launched an integration with your partner, and that integration can help you sell your product to prospects who are already customers of your tech partner.
- You've launched a co-marketing motion, and now you've got EQLs to accelerate through the sales pipeline.
- You've got overlapping opportunities with your partner, and you're ready to sell your joint solution together.

Co-selling is most often the final stage of strategic, tech, and channel partnerships.

Co-selling requires purposeful *individual* attention. You need to convince your AEs that it's worth it for them to bring a partner into the sales conversation, and you need to convince your partner to do the same with their AEs.

But co-selling can be risky for your sales team: It can be an untapped source of new leads, but the *quid pro quo* often also requires your sales reps to risk political capital by making intros to help out your partners.



## Indispensable Tactics: Enable



To make your program successful, your sales reps need to see that the benefits outweigh the risks. There are three reasons an AE would agree to co-sell with a partner:

- 1. Closing a competitive feature gap.** If your AE is losing deals because your competitor is offering a popular feature or use case, co-selling can help you close that gap by bringing in a partner who can integrate with your solution and offer that missing functionality.
- 2. Closing a requested feature gap.** Maybe there is one last feature that an AE knows would seal the deal or ensure renewal. A partner with an integration can help the AE close that gap.
- 3. Go slow to go fast.** Intro your partner into an account, and they will do the same for you and your team. It may take a bit of groundwork, but once your co-selling process is buttoned down, you'll close more deals faster than if you tried alone.

Just as your partners need to build muscle memory to know what to talk about and when in regards to your product or services, your sales team needs to build muscle memory around the SaaS ecosystem at large and how your tech ecosystem fits in.

You should teach your sales team about:

- **The logistics of working with your integration partners**, including specific co-selling processes like when and how they should reach out to your partner's sales team, messaging for selling the integration, and competing solutions or conflicts.
- **Product functionalities that conflict with and complement your product.** If your product works well with other products – regardless of any integrations – your team can learn to speak knowledgeably about specific workflows relevant to the prospect.
- **Becoming more consultative in their conversations with prospects.** If your sales team can show their customers value beyond your company's core value proposition, it can go a long way. For example: Ryan Sholin, Director of Business Development and Partnerships at Automattic (WordPress VIP), says he develops partnerships that go beyond the open source content management system's (CMS) standard plugins.

"It's the difference between 'Here's a plugin from the ecosystem that people use' and 'Here's an enterprise solution that works and that people find successful,'" says Sholin.

## ● Indispensable Tactics: Enable



"It's the difference between 'Here's a plugin from the ecosystem that people use' and 'Here's an enterprise solution that works and that people find successful,'" says Sholin.

### ● Prep your co-selling “curriculum”

Your sales reps will need to stay on top of growing their tech stack knowledge as your partner ecosystem grows and the ecosystem at large changes — that can get a little overwhelming. Do your best to maintain a healthy balance of providing your team with the latest information and allowing enough time to let it all sink in. Try treating your sales enablement process like a *curriculum* with course agendas that build on each other, and refresh older course material for new hires (or those who are more forgetful).

Start with a *101 session* to go over the basics of your tech ecosystem, competing products, complementary products, and so on. Host refresher sessions twice a year for new hires and to share new learnings — while making the resource, whether through slides, a resource hub, or partner directory, available to your team at all times.

Mix in *201 sessions* to bring your sales team deeper into successful use cases your team has uncovered in their sales conversations, new integration functionalities, or new functionalities for your partners' products and how they improve your better-together story.

Provide *301 sessions* for your sales team to opt into if the information is relevant to their existing sales conversations — or dedicate these sessions for senior sales reps who are working with strategic accounts or who can cascade their learnings throughout the entire team.

This curriculum is food for thought and can be easily applied to your partner enablement program, too. Use this as a jumping off point to create an enablement schedule for the year that works for your team, your sales team, and your unique partner program.

## ● Indispensable Tactics: Enable



### ● **Make engaging partners easy for your sales team**

Part of the challenge of getting your sales team on board is that they either don't want to learn another tool (your PEP) or don't want to ask you for help.

Your PEP might have the ability to pull your partner data into the apps your sales team frequents every day. Through the [Crossbeam Partner Cloud](#), for example, your sales reps could be cruising partner data in their [account dashboards in Salesforce](#) or as they're [prospecting in Chrome](#). This way you don't have to be the middleman, and your sales reps can get proactive and strategic about pulling in specific partners to accelerate an opportunity.

"When I can show a specific account executive the opps under their name vs. a generalized list that applies to the entire team, it better sets them up for success," says Ryan Klekas at Bombora.

Klekas adds, "Our CSMs and AEs love the fact that I'm bringing them real-time information on their assigned accounts."

### ● **Kick every meeting off with a recent win**

Carina Shahin, Partner Account Manager at Sendoso, likes to celebrate recent wins at the start of the presentations she gives to her sales team.

Start off every sales enablement presentation (from your SKO to your next All Hands) with a recent partnership win. It'll give your sales team context they can directly apply in their daily workflows and your sales leaders examples from the field they can use to train their team.

Not only does it tell a compelling story about what success looks like, it can sew the tiniest bit of FOMO among the reps who haven't been engaging with the partnerships team.

## ● Indispensable Tactics: Enable



### ● Establish partnerships-focused OKRs (and include accelerators)

Start at the top. Establish OKRs for your sales leader tied to the goals of your partnerships team. Establishing partnership-related goals at the leadership level will help the partnerships responsibility cascade down through the entire sales team.

Your sales leader could be held accountable for helping their team:

- Qualifying a minimum amount of opportunities through partners
- Closing a minimum amount of deals with partners
- Increasing deal sizes with partners
- Shortening the **time to close** for opportunities won with partners

Then, your sales leader should assign OKRs to each of their sales reps to ensure they:

- Hold calls or meetings with their counterparts at your partner companies each week
- Close a specified number of partner-sourced or partner-influenced deals each quarter

"The sale's team's commission stays the same. In fact, getting a partner lead is now a reward to the sales reps for hitting quota because they convert at a much higher rate," says Natalie Boone at Greenlight Guru.

To make things even more fun for your sales team (and you), tie in sales accelerators. Sales accelerators encourage sales reps to close deals even after they've hit their quota for the quarter. Provide your sales reps with a greater commission (think: 15% commission on deals closed before they hit their quota versus 20% on deals closed after they hit their quota). Make the sales accelerator percentage even higher for deals closed with partners than deals closed without.

### ● Final bits of sales enablement wisdom

**Give your sales team a voice in the process.** Some partner managers lament that they are having trouble incentivizing their sales reps to participate in co-selling. But oftentimes, the opposite happens: Reps see partnerships as an untapped wellspring of new accounts and they dive in headfirst (and they're right).

## Indispensable Tactics: Enable



It's important to involve your sales reps as much as possible while maintaining a mutually beneficial process for both partners (and sales teams).

Greg Unruh at Shipware uses a system he refers to as **role-based partner pairing** to match his outbound sales reps with their partner counterparts for co-selling. He helps his outbound sales reps to establish a weekly or bi-weekly cadence for touching base about their shared accounts with partners. To make sure his partner's sales reps are keeping up their side of the bargain, he has his sales reps score their counterparts. Unruh has established a scoring system in Salesforce to ensure each pairing is successful.

You can also use this scoring system to make sure your sales reps' counterparts aren't taking *too much from them too often*. In Unruh's case, a score of "0" means there's very little to no engagement between the sales reps, while a score of "4" means there's a high level of engagement. If one of Unruh's sales reps gives their counterpart a score of "0," Unruh unpairs his sales rep with the particular counterpart and rematches them with another.

By adopting this scoring method, you can create custom scores that signify too little engagement, too much engagement (without reciprocating), or *just right* – while making sure your sales reps are heard throughout the co-selling process.

**Protect your sales team's time.** Coordinate ahead of time with your partner manager counterpart. Have a meeting structure, have a hard stop on the meeting, set up next steps, and do as much of the work for your own sales reps as possible. If your rep's first interaction with your partner program is some warm leads dropped in their lap, they'll be more enthusiastic about keeping it alive.

**Point your team to the right resources.** Train your sales team to be tech stack experts. Let's face it: SaaS is a complicated world, and your sales team has to learn about every tech partnership you launch *while hitting their quotas*. Make it easy for your sales reps to access the information they need on the fly.

Ryan Sholin at Automattic (WordPress VIP) says his team provides their new hires with documentation for quick answers and gut-checks to help them with common tech stack questions.

## Indispensable Tactics: Enable



"If the question, 'What do you have for personalization' is asked—and it frequently is—you can go to our reference chart and get a quick answer and know what to tell the prospect or customer. And then dig deeper and get into the details and get a referral going if necessary," says Sholin.

Meanwhile, Shahin encourages her team to reference Sendoso's public-facing partner directory to confirm who their partners are and which tools or platforms are the best fit for a particular account.

George Haenisch, VP of Alliances at Hero Digital, and his team have developed a wiki-like research hub to educate his client services team on:

- Co-selling messaging
- Deal projections for forecasting revenue associated with a given opportunity

"We help our [sales] team understand where we're at so we can size a project appropriately and we don't come in and say, 'We think it's a \$1,000,000 project,' when it's actually a \$100,000 project," says Haenisch.

Okta outlines relevant partnership plays its sales team can execute — which include "better together" messaging and the "why" story behind a given joint solution.

"Where possible, we also work on technical documents and visuals for partnerships that are more complex," says Maureen Little at Okta. And the cherry on top of the cupcake...

**Compensate your sales reps.** If someone asks you to do something for them and, in exchange, they'll gift you a cupcake from your favorite bakery — you can't help but smile. You were going to do what they asked you to do either way, but now you get a cupcake, too!

And by "cupcake" we mean "money."

Your sales team might have everything they need to co-sell successfully, but giving them something they can smile about can put a Sonic-the-Hedgehog pep in their step — making *partner outreach* a concrete part of their daily workflows.

## Indispensable Tactics: Enable



Depending on how flexible your budget is, you have a few options for **compensating your sales reps**:

- **Offer management by objectives (MBO) bonuses** early on to drive behavioral adjustments. This option is great for a small company (think: the one-person partnerships team) that needs their sales reps to assume the role of channel managers.

Greg Unruh at Shipware, calculates MBO bonuses for his sales reps using actions precedes results (APR) scoring. Through this process, he assigns a set of predetermined scores to various partnerships-related activities. Each time his sales reps complete a partnerships-related activity during the quarter, they receive the activity's corresponding score. The culmination of these scores determines each sales rep's MBO bonuses.

Unruh offers MBO bonuses to the sales reps who meet their quotas to fuel their adoption of channel sales tactics. Then, he phases the bonuses out.

- **Offer sales program incentive funds (SPIFs)** as an immediately redeemable reward. Give your sales reps immediate cash rewards for closing a deal with a partner, increasing the deal size with a partner, or even simply meeting with a partner. This incentive is great for a partner program that's somewhat mature and has resources (like budget) available for driving repeatable results.

"I didn't care if they talked about their accounts, just that they spoke," says Michael Barnes, Director of Partnerships at CM Group. "That's going to build the frontline thinking so when a partner's customer has a requirement that our product helps with, they will turn to a friendly face."

- **Give your sales reps quota relief.** For your most strategic partners that you know increase your bottom line with the more deals *they* close — give your sales reps 100% quota relief.

For example, if the data (read: sources of truth) shows that your prospects are more likely to become your customers after becoming a customer of your partner, it only benefits your company if your sales reps help your partner close more deals. If the deal is for \$100K, let your sales rep retire \$100K against their own quota. This gives your sales reps just as much incentive to close a deal for your partner as they have to close a deal for your company.

Now, you're ready to execute.



You've **Sourced** the data using account mapping. You've **Decided** which partners you will work with. You laid the groundwork to **Enable** your partners and sales team. Now, it's time to **Execute** your partner motions.

While there are many permutations of partnerships, most typically end with two common partnership motions:

- Co-Marketing
- Co-Selling

### Co-Marketing

You've identified a high overlap count between your prospects and your partner's prospects, and you're excited to team up to create content and events that turn your prospects into qualified opportunities. Or, maybe you decided to create an integration and it's time to let the world know (more on that on page 73).

You're going *official*. By aligning your brands publicly, your partner is saying that you're *one of the cool kids* (or vice versa) to your prospects while establishing your place in the ecosystem. Through joint content and events, you'll be able to access audiences you'd have difficulty breaking into on your own with a pre-vetted reputation, thanks to your partner.

These joint projects are usually "co-branded" featuring the logo, messaging, and branding from both partners. You get access to your partner's audience through shared marketing efforts (e.g. EQs from a co-hosted webinar), while your partner gets access to your audience. That's a whole lotta reach — into more accounts that fit your ICP, new segments, or new markets — that would've been impossible to achieve alone.





Some examples of co-marketing include:

- Co-branded email marketing campaign
- A blog post
- A how-to article or help center page
- Podcast
- Webinar
- A live event or private dinner
- Virtual event
- Case studies
- Testimonials
- White papers
- Ebooks
- Direct mail (yes, you can use old tactics with new data!)

When thinking about partner-sourced and partner-influenced revenue, it's no mystery that co-marketing is slightly more difficult to track than co-selling. Your co-marketing motion could lead to more visitors on your website (in which case you likely don't even have account details) or a direct conversion through an app marketplace (in which case the attribution is pretty clear). Furthermore, the lead could get tagged as a marketing qualified lead (MQL) rather than an EQL.

Co-marketing could be the first touchpoint between the potential customer and your brand, or the last touchpoint before entering the hands of your sales team.

"In partnerships, there's always conflict," says Garrett Helmer, Head of Global Alliances and Channel at Vasion. "What is the true source of the customer's lightbulb going off? Did the channel partner do the education or did we?"

Because co-marketing could be so fuzzy, you might find yourself hesitant to team up with potential partners for a long-term commitment right off the bat. It could be a big time suck, resource-intensive, and wield little to no results — if you don't play your cards right.



### The Crossbeam co-marketing formula

We've met with hundreds of partnership leaders, and we've observed a consistent strategy for building a co-marketing campaign.

#### Step 1: Candidly assess priorities with your partner

When you embark on a co-marketing campaign with a partner you're making a commitment to one another. As the "co" suggests: You'll need to cooperate and share efforts and resources to help one another meet your shared and individual goals. Before you begin a co-marketing campaign, be candid about what success looks like and who should own specific responsibilities. What are you trying to accomplish?

An asymmetry in contributing efforts or resources, or a misunderstanding of audiences, can lead to frayed relationships and a loss of credibility, internally and externally. In most cases, you'll want to create a basic agreement and get clear on some of your goals.

"We ask people to do a marketing agreement first, and they may freak out, but once that's in place it's easy," says Francois Grenier, Head of Partnerships at Sendoso. You don't have to live and die by the agreement but it sets expectations. "At the end of the day it's about having people willing to work together."

It's like your first day with a new roommate: You'll probably have to set some ground rules.

"We take an educational approach," says Maddy Martin, VP of Marketing at Smith.ai. "If you said to me, 'Let's do a webinar,' and you sent me your sales deck, that's a huge turn off. I'm not bringing my audience to you for a pitch."

And if you don't set expectations up front, you're liable to get stuck after taking initial steps.

"I'm done with partnerships that make great press releases and nothing more," says Andrew Lindsay, SVP of Corporate and Business Development at HubSpot. "It's easy to announce a partnership, it takes much more work to make it valuable for customers."

## Indispensable Tactics: Execute



Some details to consider including in your agreement:

- **Approval process** - Who approves assets? Who is editing?
- **Monetization** - Who pays for the campaign?
- **Paid campaigns** - Is either party paying for advertising?
- **Branding** - Is this co-branded? Is one company more prominently featured?
- **Obligations and deadlines** - Who is doing what and when?
- **Lead swapping** - Who captures data from the audience? Is that data shared with partners? How?
- **Measuring success** - Is the campaign an effort to promote integration installations? General brand awareness? Sell event tickets? Generate email leads? Be clear and set goal numbers.
- **Failure to comply** - What happens if someone doesn't hold up their end of the agreement?
- **Distribution channels** - How will they share your co-marketing campaign? Is your audience there?
- **Audience quality** - When your partner asks their audience to do something, do they do it? A partner can boast they have, say, 500,000 email subscribers. But that's less impressive if only 150 show up to the next webinar.



On the Crossbeam Blog: [Read more about partner agreements.](#)

### Step 2: Share exactly the right amount of data

Remember through all this that a successful well-done account mapping exercise has accomplished three things:

- Identified the accounts where **you and a partner already both have existing relationships** of some kind and are able to engage. You can team up to engage this audience in unique and personalized ways.
- Identified the accounts where **only you hold a relationship**, and your company keeps the data secure and private to you. You can collaborate by creating content targeting on the content sent to this audience, but the actual outreach and tracking is *your responsibility*.

## Indispensable Tactics: Execute



- Identified the accounts where only **your partner holds a relationship**, and your partner's company keeps the data secure and private to them. You can collaborate by creating content targeting on the content sent to this audience, but the actual outreach and tracking is *your partner's responsibility*.

While we've seen countless examples of companies bending these guidelines to cross-pollinate or share lists, the safest and most responsible approach is the division of labor outlined above. Again here, you can only execute on this style of outreach if you are using a secure third-party PEP to do the account mapping. If you're just emailing spreadsheets (or not sharing any data at all) your options are much more limited

### Step 3: Know your shared customers / opportunities

This is one of the primary reasons people do account mapping, whether it's with a PEP like Crossbeam or with an old-school spreadsheet approach. Without a sense of your possible audience size, your co-marketing campaign may be dead on arrival.

One brand might sound good on paper but fall flat when it comes to generating leads. Meanwhile, you might be unfamiliar with another brand that can give you direct access to prospects similar to your most strategic prospect accounts. Account mapping can help you say "yes" or "no" to the right co-marketing partners faster.

	Partner's Customers	Partner's Opportunities	Partner's Prospects
Your Customers	Build a tech integration, case studies	Give partner warm introductions/ context	Collect referral revenue
Your Opportunities	Get warm introductions / context from partner	Solution selling, co-marketing	Co-selling, co-marketing
Your Prospects	Get warm introductions / context from partner	Co-selling, co-marketing	Co-selling, co-marketing



For co-marketing motions that rely on email, you can use this shared list as the starting point for any email send. For co-marketing motions that rely on advertising or paid campaigns, you can use these lists for retargeting.

### Step 4: Meet them where they are

So how do you do this outreach? Creating the exact campaign is the fun part, and depends largely on your market, your audience, and your product. Some examples:

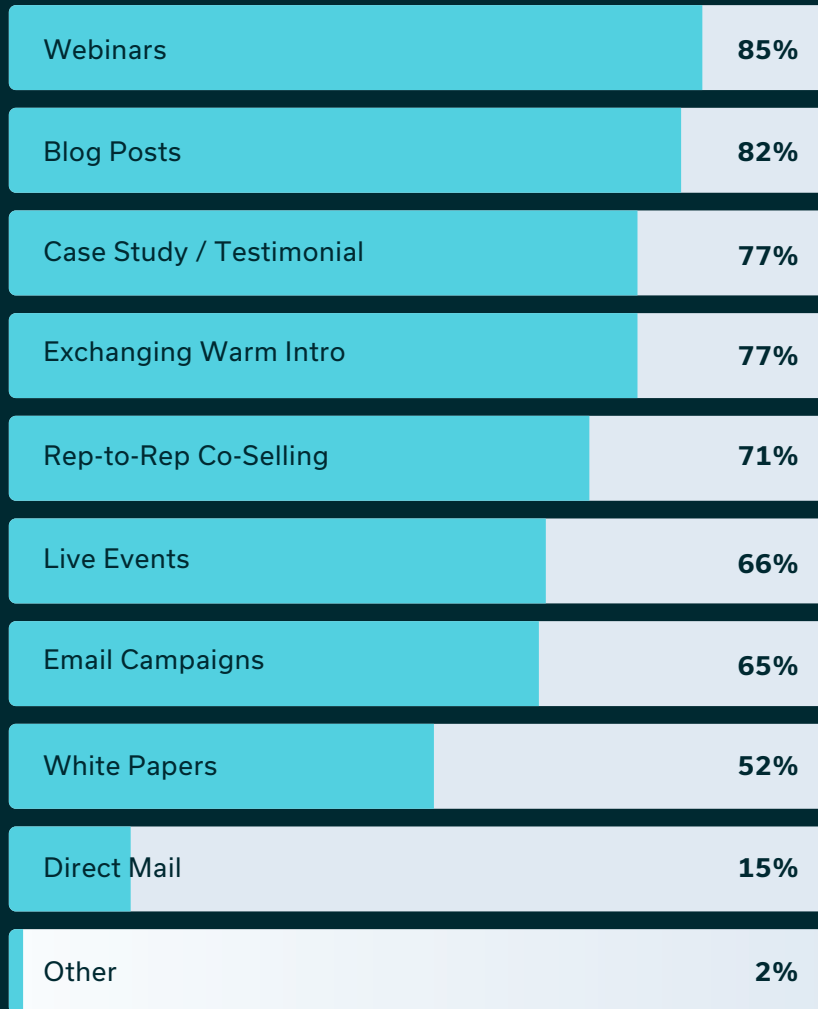
- Paid for entirely by its co-marketing partners, Sendoso once hosted a tailgate experience called the "Send Zone," where the team traveled to sporting events in an RV co-branded with partners who sponsored the event. Each company involved was allowed to invite prospects in that region to enjoy refreshments, play lawn games, network, and learn about their solutions
- Typeform writes detailed how-to blog posts that tell the story of how a shared customer uses a new integration. "It gets really hands-on and product-focused," says Grenier, who previously worked at Typeform and is now at Sendoso. "I am fond of that, because it's practical for our audience which is a lot of small businesses and mom and pop stores. This drives stickiness and gets them where they need to go."
- Unbounce created a **"lookbook" with partners** that is a collection of visual inspiration for things like landing pages.
- Zendesk and Stella hosted a webinar about **how a customer used their shared solution**.
- InVision once created an entire documentary with its customers and partners called "Design Disruptors."
- Smith.ai **creates infographics** using its partner's data.
- PartnerStack hosted its **"Partner Power Summit"** featuring pre-recorded talks from its partner ecosystem.
- At industry events, Sailthru invites seven of its customers with seven customers of a partner to a private dinner to introduce them all to one another.
- Each year, Unbounce hosts themed days or weeks with its partners. An example is **"Digital Agency Day"** a collection of 10-12 online talks on topics of interest to its agency customers. It offers a one-to-one lead exchange up to a certain threshold. If partners meet that threshold, they unlock the full list. Previous events have had 10,000 registrants.

## Indispensable Tactics: Execute



Most common, however, are digital experiences like webinars and blog posts.

In what ways do you go to market with your Tech/Integration partners?



Keep in mind: a co-marketing partnership doesn't have to be between *only* two partners.

"We don't always assume it's only two companies in a partnership," says Maureen Little at Okta. "As long as we're not competing, we may find that **co-marketing**, **account mapping**, referral programs work well with non-standard partners. We do a lot in the productivity space with **Box**, **Zoom**, and **Slack**. We don't compete, and **our story** is critical as companies try to engage with their employees."



### Measuring your co-marketing campaign

Part of knowing what success looks like means measuring your campaign holistically. But when your campaigns exist in multiple places on the web (think: landing pages, your partner's site, social media, and so on), even the idea of measuring success sounds overwhelming.

On top of that, everyone is co-marketing. So, how do you stand apart?

"It can be easy to do very poorly. The idea of 'Let's go do webinars and email campaigns and joint blog posts' sounds good, but do we really need more of that?" says Shay Howe at ActiveCampaign. "It's about the signal to noise ratio. How do we get and keep people's attention?"

Jump to page 67 of the Partner Playbook to get a birds-eye view of:

- ActiveCampaign's co-marketing playbook for getting the #1 spot in Salesforce's AppExchange
- Google and HubSpot's GTM Strategy for Their Ads Optimization Events tool

And remember: Not every co-marketing effort needs to be a huge lift. You can start small (see the "crawl-walk-run mindset" on page 66).

Take Workato, for example. The intelligent automation platform founded in 2013 is entering into the next phase of its co-marketing strategy with partners:

"Now that we have more partners and more partner managers we also have to put metrics around our marketing budget," says Mary Vue, Senior Director of Business Development at Workato. "The question becomes, did this partner achieve the things they were supposed to achieve in comparison to other partners – and therefore the activity they're requesting qualifies them to marketing development funds (MDF)."

The Workato team is looking at its **partner tiers**, budget spending, and campaign results to understand where and how they should dedicate more of their resources to partner marketing.

## Indispensable Tactics: Execute



Test your co-marketing strategy with each partner, and measure metrics that align with the goals and expectations you and your partner set up front. Does your tech partner care most about integration adoption for existing customers – or the number of opportunities closed through co-selling? Does your channel partner care most about deals closed – or the longevity of the customer lifecycle?

"The product side of me cares about integrations being adopted," says Billy Robins, Head of Strategic Partnerships at productboard. "My marketing side cares more about people coming and using us. It depends."

If you have a sales background, you may be inclined to measure marketing campaigns by pipeline generated. If you have a marketing background you may be more accepting of looser measurements of success like "touches." Product leaders may care more about the level of engagement. Plus, the **key performance indicators (KPIs)** you're measured on can make you care about any combination of the above. Some examples:

- **Brand love / exposure** - The squishiest way to measure campaigns. This requires that you are okay with unmeasurable exposure to your target audience. An example may be an on-stage conference shout out or sponsoring drinks at a happy hour. You can never trace who became a customer thanks to those efforts. "Maybe the value was not in the integration, it was learning about what we do," says Grenier.
- **Joint product engagement** - If you are co-marketing a product integration, you'll be able to measure any upticks in usage or installs. If Snowflake and Looker give a joint talk at an online event and see a 10% jump in the rate of new clients connecting their products together, they can infer with some confidence that the webinar played a role.
- **Leads, opportunities, and deals** - If your co-marketing motion requires email signups like a webinar or event, you can pool sign ups with your partner and easily attribute new leads back to the event. You can follow these leads through your funnel and watch them convert to opportunities and deals over time, always knowing that you can attribute the relationship back to that first co-marketing touchpoint.





### The crawl-walk-run mindset

For most high-growth companies, the size of their marketing megaphone starts to grow rapidly around the same time that their partner ecosystem starts to emerge.



On the Crossbeam Blog: [The Rule of 99: Why Partnerships Get Complicated at the 100-Employee Mark](#)

This can lead to current and potential partners reaching out with possible co-marketing ideas. And it can quickly get messy.

When this happens, you are in the danger zone. It's incredibly easy to say "yes" to everyone and over-promise while you run around stuck in tactic hell for quarter after quarter before realizing you made no discernable progress on your KPIs. Be proactive and not reactive.

"That balance is tricky and hard and it happens faster than you think," says Brad Armstrong, VP of Business & Corporate Development at Slack. "You want to manage the inbound to have time to focus on the important, long-term tasks," he adds.

With co-marketing, the time it takes to execute can compound quickly. So embrace a crawl-walk-run mindset. First do something low effort with little time investment. Measure the results. Build muscle. Then, do something a little bigger and faster. Then a little more.

Try testing the waters with [micro co-marketing motions](#) to see if your team and your potential partner's team jive. These can include:

- Offer a blog swap to measure upticks in website visitors and engagement.
- Link to your partner in a blog post to gauge interest from *your customers* in your partner's product.
- Invite your partner to participate in a webinar that's already in the works. It's an easy lift, and you'll get an idea of how many EQLs your partner can bring in.
- Exchange Tweets, and maybe, just maybe, your followers will *demand* an integration between the two of you.

## Indispensable Tactics: Execute



These micro co-marketing motions can help you see what it's like to work with a partner and **get early results to brag about** to your leadership team.

"I often start off by saying 'Let's swap some social media posts'," says Brian Jambor, Head of Partnerships at Sendoso. "Juxtapose that with a webinar. Pulling that off is much more complicated. Who should you invite? How many marketing emails should you send? Who is running the ads? Are we doing retargeting? Who is creating the slide decks? What platform are we using? It's such a heavy lift. We have to have someone that has a ton of prospect alignment with us to do that."

*Micro* co-marketing motions are a great start when you need to:

- Develop a "proof of concept" to get your CEO bought in
- Gauge the *work chemistry* between you and your partner (Does your partner reciprocate the workload?)
- You just don't have enough time right now to start another co-marketing campaign with a partner, especially if it could fly or die

"At the start, it's better not to do a deep integration unless it's a game-changer," says Lisa Kleinsorge, Director of Global Business Development and Product Partnerships at Twitter. "Do a lightweight marketing cooperation as a step one. Make sure your teams get along. Make sure your user bases respond... and then you'll have some traction."

Once you've had a taste of co-marketing success with your partner, consider signing a co-marketing agreement and embarking on your go-to-market journey together. But, hold up a minute: are you moving too fast? Just because you've got a big picture vision in mind (a constant stream of lead-gen and ear-to-ear smiles for your leadership team) doesn't mean you should overcommit your team.

It's all about the approach.

Unbounce once used a playbook they called "turkey pieces" because they do one high effort go-to-market play and then "slice it up" into several smaller deliverables and outputs. For example, they produce a webinar featuring a partner and a shared customer who has benefited from their solutions in tandem. Then the resulting content is made into an email campaign, blog posts, and other collateral.

It's the gift that keeps on giving.



## Indispensable Tactics: Execute



Co-marketing an integration is a little bit different. Read more about the "co-marketing flip" on page 69? If you're marketing an integration, you'll need to hustle to develop all of your foundational materials, like one-sheets, app listings, etc. prior to launch day. Then, approximately six months into the partnership, flip your co-marketing to *proactive*. Co-Host events, develop a blog post series together, and produce those video case studies!



### CRAWL

- Social media
- Blog post
- In-app messaging
- Newsletter mention



### WALK

- Co-selling
- Lead swapping
- Landing page creation
- Press release
- Dedicated email



### RUN

- Webinar
- Case study
- Live events
- Video
- New product integration



## Co-Marketing Examples

We get it, a lot of the tactics around partnerships are discussed in the abstract. "Just..." \*waves hand\* "Do some co-marketing!"

Below, we pull real-world examples from companies of all sizes to help you see how the pros execute these campaigns and move their KPIs. The examples:

- How Google and HubSpot used co-marketing for a 232% increase in feature adoption for their ads integration
- How RollWorks executes the "co-marketing flip" to increase renewals by 30%
- How ActiveCampaign climbed to the #1 spot for marketing automation apps in Salesforce's AppExchange in just six months

### **How Google and HubSpot used co-marketing for a 232% increase in feature adoption for their ads integration**

To make sure their Ads Optimization Events integration would launch with a bang, HubSpot and Google set themselves up for success by:

- Defining the goals for the integration (e.g. increasing integration adoption and increasing usage for both companies' ads tools)
- Getting their product teams together to sync their integration roadmaps
- Getting their marketing teams together to align on messaging and roll-out (e.g. deciding special offers and determining how to educate their customers)
- Devising a plan to create enablement videos, training sessions, and collateral for Google's sales team and HubSpot's customer success team

"HubSpot has worked with Google for quite some time now, there is so much trust among our teams," says Kelsey Peterson, Manager of Strategic Partner Enablement and Operations at HubSpot. "The collaboration between HubSpot and Google is straightforward because we have clear communication and trust with each other."

## Indispensable Tactics: Execute



Here's a quick glimpse at just a few co-marketing materials HubSpot and Google developed for their Ads Optimization Events tool:

### Before Launch

- Integration video for HubSpot's customer success and sales teams
- Internal integration guide for customer success, marketing, and sales teams on product messaging and how to help customers set up the integration

### Launch

- Integration deck to enable Google's sales team
- Technical training video and deck for Google's sales team
- FAQ page for both HubSpot and Google hosted in Google Drive
- Announcements in community forums
- Knowledge base article
- Joint case study

### After Launch

- A blog post on HubSpot titled "Why You Should Be Leveraging HubSpot Ads Optimization Events"
- Shared webinar, marketed on social media by speakers
- Integration landing page
- Virtual training for 100 Google sellers
- Google agency webinar featuring HubSpot
- HubSpot webinar featuring Google
- A product roundup blog post featuring the integration
- An "Ultimate Guide" PDF

Whew. That's a lot of prep. But did we mention the integration led to a 232% increase in feature adoption in just five months? #WorthIt

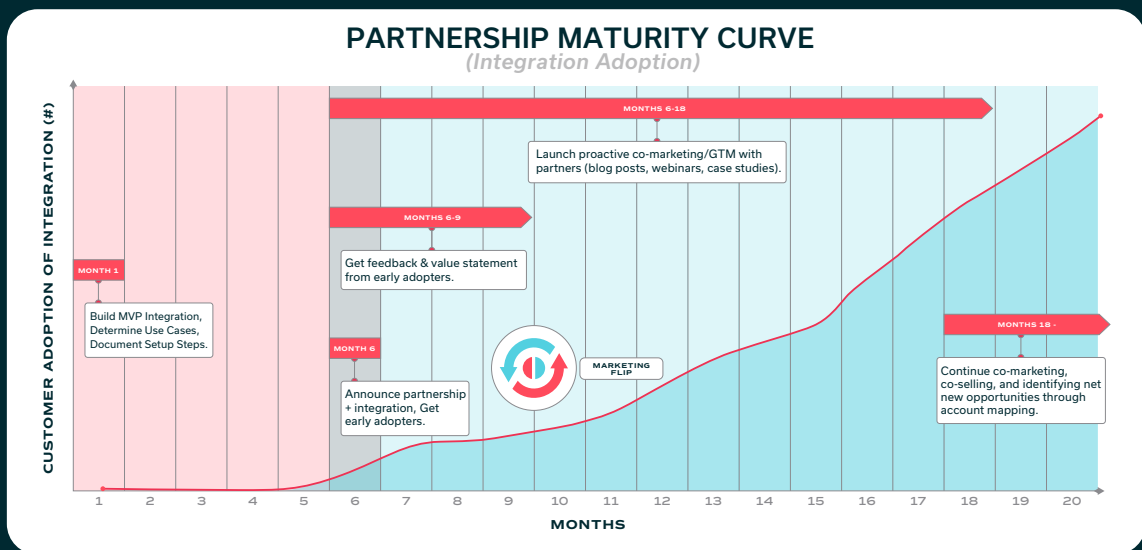


### How RollWorks executes the “co-marketing flip” to increase renewals by 30%

Mike Stocker, VP of Strategic Partnerships at account-based marketing platform RollWorks, says you should “flip” your co-marketing efforts from foundational (think: creating landing pages and one-sheets) to proactive (think: co-hosting webinars or doing blog swaps) sometime between the six-month to one-year mark in any strategic tech partnership.

In his experience building partnerships at Marketo, Vidyard, Facebook, and now RollWorks, Stocker has analyzed the lifecycle of many tech partnerships and has developed a partnership maturity curve for maximizing integration adoption.

Notice the “co-marketing flip” six months in.



Source: Mike Stocker, VP of Strategic Partnerships at RollWorks

Since RollWorks and their partner Bombora made the “co-marketing flip,” their integration has gained hundreds of adopters (as of December 2020) — That’s more than 50% of RollWorks’s customer base.

Follow Stocker’s partnership maturity curve to set the bar high for every integration you launch. Some general timelines to-know:



## Pre “co-marketing flip”

Develop the necessities for getting your integration ready for launch.

- Develop your MVP integration, with feedback from a shortlist of strategic customers (those who have a high need for the integration and who have a good relationship with your customer success or partnerships team).
- Develop content for your website, email marketing, advertising, and other channels to educate your customers and prospects about the integration and its use cases.
- Get feedback and value statements from your early adopters for your website and other collateral.

## During and after the “Co-marketing flip”

Get strategic with your co-marketing to drive integration adoption numbers up!

- Develop a press release announcing the integration (and include some of your value statements!). Publish your press release on a distribution site like Business Wire or PR Newswire, and share the link in your newsletter, emails to customers, and so on.
- Map accounts with your partner to identify all of your mutual customers.
- Start getting methodical about how you’re going to reach these customers through co-hosting events, webinars, advertising, and the list goes on.
- Develop a long-term co-marketing calendar that outlines each marketing output you and your partner will launch and when for the upcoming year.

**Events & Activities Co-Marketing Plan**

Area	Activity/Event	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
Sales Engagement	CSM/AE Calls, L&Ls, Virtual Learnings												
Webinars	Thought Leadership, etc												
Customer Value	Case Studies												
Publications	Blog Posts, Press Releases, Newsletter												
Events Participation	User Events												

## ● Indispensable Tactics: Execute



"To grow a partnership, there needs to be a heartbeat — something almost every month to make the partnership successful," says Stocker.

"So you need to propose to those partners, 'Here's what I want to do in January, here's what I want to do in February, here's what I want to do in March,' and then make the work-back schedule to make sure that's happening."



Stocker says you should also use the partnership maturity curve and the "co-marketing flip" to expand or pivot any of your veteran tech partnerships. By following the partnership maturity curve timeline, you can plan multi-year co-marketing campaigns and set a deadline for revisiting your strategy with each of your tech partners. This is also a good time to revisit your account mapping overlaps to identify new integration adoption opportunities for your mutual customers and co-marketing opportunities for your target accounts.

"It's revisiting the integration and updating it, and guess what, that same cycle starts again," says Stocker. "The key to partnerships is keeping it alive, keep the heart beating — re-invigorate integrations by leveraging customer feedback so they don't get stale and they continue to provide value."

Let's look at an example of a co-marketing campaign where the "co-marketing flip" rang true for another SaaS company — well, two SaaS companies, actually.





### How ActiveCampaign climbed to the #1 spot for marketing automation apps in Salesforce's AppExchange in just six months

ActiveCampaign (a customer experience automation platform) and Salesforce started chatting about developing an integration in mid 2019. For the next six months, the team at ActiveCampaign worked on:

- Developing the integration
- Getting feedback from beta testers
- Developing foundational co-marketing materials like help docs, landing pages, and their official AppExchange listing

Six months into their partnership, and in alignment with their public launch, ActiveCampaign and Salesforce commenced what RollWorks calls "the co-marketing flip." Specifically, ActiveCampaign:

- Teamed up with Salesforce for fireside chats at national Digital Summit conferences
- Planned a series of intimate 30-person "Study Halls" to explore specific customer use cases live in multiple cities
- Wrote blog posts explicitly promoting the integration and others casually mentioning Salesforce
- Developed case studies with Museum of Science & Industry, Chicago and Thinkific
- Hosted an integration launch party

Sounds simple enough at first – but the marketer in you knows the amount of promotions that go into planning a successful event. Just imagine the emails, the Tweets, the advertising, and even the internal linking that contribute to a cohesive co-marketing campaign that generates leads and brings opportunities in for an active sales conversation.

ActiveCampaign shared more than **30 co-marketing materials** with us to show how they promoted their integration with Salesforce from May of 2019 up until getting the #1 spot in August of 2019.



### Co-Marketing an Integration

One of the most common partnership motions is building an integration. Take bits and pieces of this checklist to plan your next integration's co-marketing campaign:

#### Go-to-market prep (or pre "co-marketing flip"):

- Create the copy and images for the dedicated listing pages on your marketplace and your partner's marketplace (if applicable).
- Decide where to feature buttons on your website to make accessing your integration easy for any visitor on your website — a spotlight section on your marketplace directory, in your top navigation, in your bottom navigation.
- Consider putting an announcement and CTA for the integration on your login page.
- Create the copy and images for a help center page to explain how to set up the integration, with screenshots and videos if applicable.
- Develop copy and images for co-branded landing pages.
- Create the copy and images for a trial offer form.
- Develop the copy, images, and video content for your partner page, if applicable.
- Decide if and how you'll make early integration announcements or teasers for select groups of customers at events or otherwise.

#### Launch day prep (or the "co-marketing flip"):

- Prepare copy for your press release and determine which distribution channel to use (PR Newswire, Business Wire, and so on).
- Prepare copy and images for your integration announcements on your blog, email newsletter, social media channels, platform login pages, pop-up notifications on your website, a banner, and so on.
- Prepare copy and images for your blog swaps, if applicable, and identify avenues for plugging the integration news into other content your team is working on.
- Gather value statements from your early adopters for potential inclusion in your press release.

## Indispensable Tactics: Execute



- Develop joint case studies, if applicable at this point in time, to showcase a customer's success with the integration and help you make the case to other customers (Also consider testimonial videos).
- Prepare copy and images for your blog swaps, if applicable, and identify avenues for plugging the integration news into other content your team is working on.
- Prepare your paid advertising campaigns.
- Determine whether or not you're going to A/B test promotions for the integration through different versions of copy for your website's pop-up windows, customer login page, and so on.

### Post-launch:

- Keep the momentum going with the events, webinars, and other initiatives you've brought to various markets so far by leveling up with a "Part II" or "Advanced" series to go deeper into the platform or share new findings you've developed with your partner (Think: A Forrester report).
- Continue gathering case studies, value statements for your website, and G2 reviews from customers for posting on your website.
- Plan time to revisit the partnership after a year or so to determine if you should shift your strategy and to plan the next year's wave of **co-marketing** touchpoints.
- When you've hit a milestone, celebrate your success!

Then, longingly watch as your integration weaves its way into the workflows of SaaS companies everywhere (those integrations, they grow up so fast!).

## Never stop nurturing your integrations

### Drive Integration Adoption Numbers Up

The more integrations your customers adopt, the "stickier" your product becomes. As your customers use your product with more of the products in their tech stacks, those same customers will unlock more value. Happy customers lead to better retention, more renewals, and even upsells.

## Indispensable Tactics: Execute



Through real-time account mapping during their new customers' onboarding, RollWorks has seen a 17% increase in customers integrated with at least one additional partner (on top of each customer's standard CRM integration) and a 7% increase in integration usage for their customers' campaigns in just one quarter. They've also lessened the time to first value (TTFV) for their new customers by 16% in a two quarter period – meaning their customers are achieving their first business objectives through using the ABM platform faster.

### Identify areas for improvement

You can also map accounts to discover which companies could be using your integration, but aren't. An example:

<b>Overlapping customers.</b>	<b>500</b>
<b>Customers with integration installed:</b>	<b>150</b>
<b>Integration adoption rate:</b>	<b>30%</b>

Hm, that could be higher. Thanks to the account mapping process and your PEP, you and your partner now have a hit list of "easy win" joint customers where you can drive adoption of your integration and make each of your products more valuable and sticky.

But it's important to consider why your adoption rate is so low. Personally reach out to a handful of your overlapping customers who aren't using the integration:

- If they are aware of the integration, but choose not to install it, it's a **product** issue. See if the integration is meeting the needs of your customers or if it is too difficult to deploy.
- If they are not aware of the integration, it's a **marketing** issue. Work with your partner on a possible co-marketing campaign and with your sales team on messaging.

Speaking of messaging, it's time to co-sell your integration (or joint solution).



## Co-Selling

While *co-marketing* is designed to improve the top of your funnel and drive new leads into your business, **co-selling** is the act of empowering your salespeople with more data, resources, introductions, and contacts to help them close more deals, faster. You know, the bottom of the funnel.

	Partner's Customers	Partner's Opportunities	Partner's Prospects
Your Customers	Build a tech integration, case studies	Give partner warm introductions/ context	Collect referral revenue
Your Opportunities	Get warm introductions / context from partner	Solution selling, co-marketing	Co-selling, co-marketing
Your Prospects	Get warm introductions / context from partner	Co-selling, co-marketing	Co-selling, co-marketing

You'll notice in the 3x3 grid that co-selling or "introductions" appears several times. Each of these contexts requires its own approach:

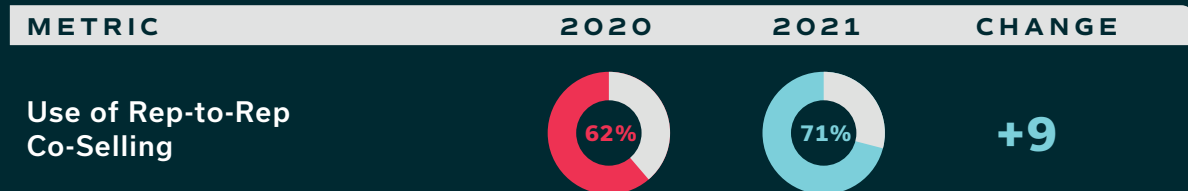
- **Prospect to prospect co-selling.** Sometimes called "solution selling", this is when two partners are approaching a new possible customer with the positioning that using their solutions or services together is the best way to meet the customer's needs.
- **Opportunity to opportunity co-selling.** Same as above, however when involving an opportunity, account executives usually (and understandably) need a bit more convincing. On the flipside, your partner can move the needle significantly at this point in the sales cycle depending on their level of influence – so convincing your sales team is well worth it!
- **Customer co-selling.** This is when you or a partner introduces the other side to an existing customer. This occurs when you have an integration or technology partner who'd like to sell to an existing customer of yours. Co-selling involving an existing customer requires a thoughtful approach with your internal sales and customer success teams. This is what most B2B SaaS partner professionals are referring to when using the term "co-selling."

## Indispensable Tactics: Execute



Co-selling can help you fill product gaps. If you are co-selling with a **technology partner**, you are filling in a gap in your functionality and value proposition. If you are co-selling with a **channel partner**, you are filling a gap in your ability to manage or sell your services.

In both cases, this rep-to-rep co-selling is growing in popularity:



Source: Crossbeam's State of the Partner Ecosystem 2021

"The co-selling partner might understand the prospect better because they created the relationship while the vendor understands their own product better than anyone," says Shawn Ragell, Partnerships and Channel Marketing Lead at Close. "That combination is powerful."

Generally, your best bet is a co-selling motion if you have a high overlap count between:

- Your prospects or opportunities and your partner's customers (intros into the account, referrals, using integrations as a value proposition)
- Your prospects or opportunities and your partner's opportunities (solution-selling)

But ask your partnership friends about their tried-and-true co-selling process, and you likely won't get the answer you're looking for. It can be difficult to establish an effective process for co-selling, because establishing a process often means experimenting, failing, iterating, and starting the cycle all over again.

To save you some headaches, we gathered two co-selling frameworks that work so you can get the wheels turning without starting from square one.

## Indispensable Tactics: Execute

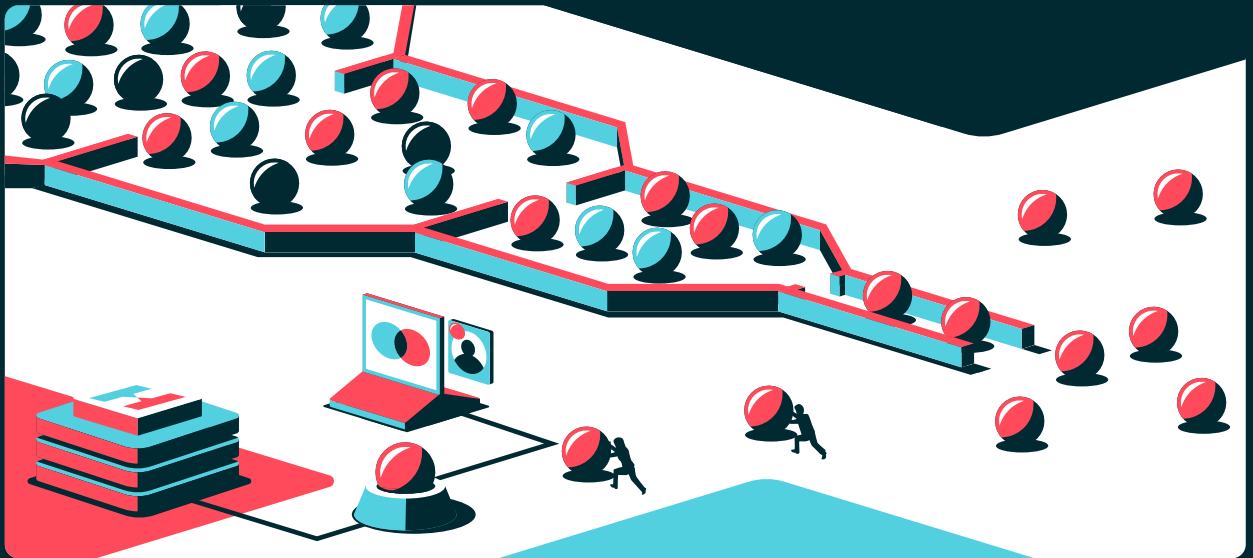


We know you know, but every partner program is different! What works for one partner program may not work as well for the next. So, consider these frameworks like an appetizer sampler. Grab what you want, and leave the rest for your friends.

Now, would you please pass the nachos?

### Framework #1 The partner impact score methodology

By following the nine steps of the "[Partner Impact Score Methodology](#)," Yule and his team have cut their target co-selling list down from thousands of ABM-sourced prospects to a shortlist of strategic prospects per partner. And in just three months, Airship has seen a significant increase in the number of opportunities qualified by its top partners.



*This framework is via Forest Yule, Senior Director of Partner Development at customer engagement platform Airship.*

## Indispensable Tactics: Execute




### • Step #1 Source of list of ABM-approved accounts

Use an ABM platform like RollWorks, 6sense, or Terminus to retrieve a target list of prospect accounts. This list could be in the thousands, but don't worry, we'll narrow it down in Step #2!

If you don't have an ABM platform, it's likely because you're still building up your pipeline. Consider using all of your prospects for this step. Or you can timebox prospects (aka "prospects sourced in the last six months").

Partner Impact Score Methodology

Target Account Name	Account Owner	Open Opportunities	ABM Approved	Ideal Customer Profile Score	Customer of Partner	Partner Engagement Score (Open Opportunities)	Partner Tier or Segment	Partner Tier/Segment Score	Partner Co-Sell Score	Partner Sales Rep
 Surfzer	Shakil	0	Approved	-	-	-	-	-	-	Mauro
 Hextall & Co.	Teddy	0	Approved	-	-	-	-	-	-	Nia
 Imaaga	Christie	1	Approved	-	-	-	-	-	-	Diana
 KSaaS	Jamila	0	Approved	-	-	-	-	-	-	Wynn

### • Step #2 Assign each prospect account an ideal customer profile (ICP) score

Layer in your ICP data. Give each of your ABM-approved accounts their relevant ICP scores. In Airship's case, they give their target accounts a score between 0-100.

Airship uses a set of 100 data points to score their prospects. You could use one data point or dozens. The important part: use factors that make sense for your business. The way in which you weigh certain attributes to determine your ICP scoring will depend on your company's business objectives.





## Partner Impact Score Methodology


Target Account Name	Account Owner	Open Opportunities	ABM Approved	Ideal Customer Profile Score	Customer of Partner	Partner Engagement Score (Open Opportunities)	Partner Tier or Segment	Partner Tier/Segment Score	Partner Co-Sell Score	Partner Sales Rep
 Surfzer	Shakil	0	Approved	70	-	-	-	-	-	Mauro
 Hextall & Co.	Teddy	0	Approved	100	-	-	-	-	-	Nia
 Imaaga	Christie	1	Approved	80	-	-	-	-	-	Diana
 KSaaS	Jamila	0	Approved	100	-	-	-	-	-	Wynn

- **Step #3 Sort the prospect accounts from highest ICP to lowest, identifying prospects that are at least a 70% match**

Sort the target accounts from "highest ICP score" to "lowest ICP score." Then, hit "delete" on every account that's below a 70% match (doesn't that feel good?). In Airship's case, they focus on the top thirtieth percentile – pick the percentile that works best for your company according to your priorities and target account list size.

This narrows the list down to a dramatically more manageable number of prospects that should be close to the number you can action in a single quarter. This shortlist of prospects is what we'll be working with for the rest of this process.

## Partner Impact Score Methodology

Target Account Name	Account Owner	Open Opportunities	ABM Approved	Ideal Customer Profile Score	Customer of Partner	Partner Engagement Score (Open Opportunities)	Partner Tier or Segment	Partner Tier/Segment Score	Partner Co-Sell Score	Partner Sales Rep
 Hextall & Co.	Teddy	0	Approved	100	-	-	-	-	-	Nia
 KSaaS	Jamila	0	Approved	100	-	-	-	-	-	Wynn
 Imaaga	Christie	1	Approved	80	-	-	-	-	-	Diana
 Surfzer	Shakil	0	Approved	70	-	-	-	-	-	Mauro

## Indispensable Tactics: Execute



- **Step #4 Map accounts with your partner to identify which of your prospects overlap with your partner's customers**

Map accounts with your partner to see which accounts on your shortlist of target accounts (read: "Prospects") overlap with your partner's "Customers" list.

For each prospect account that overlaps with your partner's "Customers" list, give the account a score of "1." For each account that is not a customer of your partner, give the account a score of "0."

Partner Impact Score Methodology

Target Account Name	Account Owner	Open Opportunities	ABM Approved	Ideal Customer Profile Score	Customer of Partner	Partner Engagement Score (Open Opportunities)	Partner Tier or Segment	Partner Tier/Segment Score	Partner Co-Sell Score	Partner Sales Rep
 Hexall & Co.	Teddy	0	Approved	100	1	-	-	-	-	Nia
 KSaaS	Jamila	0	Approved	100	1	-	-	-	-	Wynn
 Imaaga	Christie	1	Approved	80	0	-	-	-	-	Diana
 Surfzer	Shakil	0	Approved	70	1	-	-	-	-	Mauro

To note: In Steps #4-7, we're no longer narrowing the list down but rather assigning each account on your prospects shortlist a set of numbers that will factor into each prospect's "partner co-sell score" (Step #7).

- **Step #5 Identify each prospect's "partner engagement score" (the number of open opportunities your partner has with each account)**

For each of your prospect accounts that received a score of "1" in the previous step (they're a customer of your partner), determine the amount of additional open opportunities your partner has with the account.

To clarify, your partner may be selling into additional departments within an existing customer account, or they may be selling complementary products or services to the account. This is referred to as **cross-selling**.

## ● Indispensable Tactics: Execute



Use your list of target prospect accounts that meet the criteria of overlapping with your partner's "Customers" list (you retrieved this data in Step #4), and map those accounts with your partner's "Opportunities" list. Your partner must be sharing opportunity-level data to reveal how many open opportunities they have with their existing customer account.

The greater the number of open opportunities your partner has with the account, the better the "partner engagement score."

For instance, if a partner has 15 open opportunities with a given account, the partner's team likely has existing connections to the c-suite and other stakeholders at the organization. If that's the case, the partner can help facilitate an introduction for you or your sales reps to various stakeholders that you would otherwise have difficulty accessing alone.

This could make all the difference between having a sales conversation with the right people in a matter of days rather than months down the line.

### Partner Impact Score Methodology

Target Account Name	Account Owner	Open Opportunities	ABM Approved	Ideal Customer Profile Score	Customer of Partner	Partner Engagement Score (Open Opportunities)	Partner Tier or Segment	Partner Tier/Segment Score	Partner Co-Sell Score	Partner Sales Rep
 Hextall & Co.	Teddy	0	Approved	100	1	25	-	-	-	Nia
 KSaaS	Jamila	0	Approved	100	1	2	-	-	-	Wynn
 Imaaga	Christie	1	Approved	80	0	6	-	-	-	Diana
 Surfzer	Shakil	0	Approved	70	1	10	-	-	-	Mauro

### ● Step #6 Identify which of your partner's tiers or segments each account fits into (optional)

To determine the "segment" or "tier" score, assign each of your partner's segments or tiers a number. The highest number should correspond to the most strategic partner segment or tier. Determine which segment or tier each target prospect account fits into, and assign their relevant score.

## Indispensable Tactics: Execute



The prospect accounts existing in your partner's top tiers likely have the most resources and team members dedicated to them. These are the accounts a partner is most likely to have the:

- Most connections with stakeholders at the account
- Most influence on the account

### Partner Impact Score Methodology

Target Account Name	Account Owner	Open Opportunities	ABM Approved	Ideal Customer Profile Score	Customer of Partner	Partner Engagement Score (Open Opportunities)	Partner Tier or Segment	Partner Tier/Segment Score	Partner Co-Sell Score	Partner Sales Rep
 Hextall & Co.	Teddy	0	Approved	100	1	25	Platinum	3	-	Nia
 KSaaS	Jamila	0	Approved	100	1	2	Silver	1	-	Wynn
 Imaaga	Christie	1	Approved	80	0	6	Gold	2	-	Diana
 Surfzer	Shakil	0	Approved	70	1	10	Platinum	3	-	Mauro

### Step #7 Identify each prospect account's "partner co-sell score"

This step involves some math, but bear with us!

Create a weighting system to prioritize which results from Steps #4-7 are most and least important to you.

Let's use the prospect account KSaaS with hypothetical partner Vidzin in the chart below as an example. Let's say you consider the "partner engagement score" as extremely important and the "partner's segment or tier" least important. You then decide to weight each factor accordingly:

- Weight 35% (Number representing whether or not the prospect account (KSaaS) is a customer of your partner = 1)
- Weight 45% (Number representing the "partner engagement score" for the prospect account (KSaaS) aka the amount of open opportunities the partner has with prospect account = 2)
- Weight 20% (Number representing which of your partner's segments or tiers your prospect account (KSaaS) exists in = 1)

## Indispensable Tactics: Execute



With this weighting in place, the weighted numbers look like this:

- $1(.35) = .35$
- $2(.45) = .9$
- $1(.20) = .20$

And the formula is:

$1(.35) + 2(.45) + 1(.20) = \text{"partner co-sell score" for prospect account KSaaS}$

Add the results together, and you get a "partner co-sell score" of 1.45 for prospect account KSaaS with hypothetical partner Vidzin.

Partner Impact Score Methodology

Target Account Name	Account Owner	Open Opportunities	ABM Approved	Ideal Customer Profile Score	Customer of Partner	Partner Engagement Score (Open Opportunities)	Partner Tier or Segment	Partner Tier/Segment Score	Partner Co-Sell Score	Partner Sales Rep
 Hextall & Co.	Teddy	0	Approved	100	1	25	Platinum	3	-	Nia
 KSaaS	Jamila	0	Approved	100	1	2	Silver	1	-	Wynn
 Imaaga	Christie	1	Approved	80	0	6	Gold	2	-	Diana
 Surfzr	Shakil	0	Approved	70	1	10	Platinum	3	-	Mauro

- **Step #8 Rank the prospect accounts according to their "partner co-sell scores"**

Sort the "partner co-sell scores" numerically from highest to lowest. The prospect accounts with the highest "partner co-sell score" and the highest "ICP score" will play critical roles in Step #9. Keep these numbers ready!



## Partner Impact Score Methodology

Target Account Name	Account Owner	Open Opportunities	ABM Approved	Ideal Customer Profile Score	Customer of Partner	Partner Engagement Score (Open Opportunities)	Partner Tier or Segment	Partner Tier/Segment Score	Partner Co-Sell Score	Partner Sales Rep
 Hextall & Co.	Teddy	0	Approved	100	1	25	Platinum	3	12.2	Nia
 KSaaS	Jamila	0	Approved	100	1	2	Silver	1	1.45	Wynn
 Imaaga	Christie	1	Approved	80	0	6	Gold	2	3.16	Diana
 Surfzer	Shakil	0	Approved	70	1	10	Platinum	3	5.45	Mauro

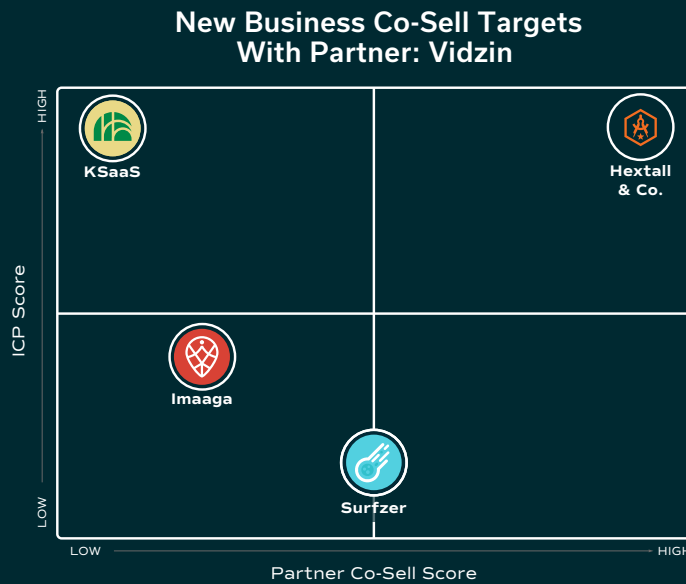
- **Step #9 scatter plot the prospect accounts using their “partner co-sell scores” and “ICP” scores in a four-quadrant matrix**

Now it’s time to scatter plot your shortlist of prospect accounts in a four-quadrant matrix. Remember that ICP score you created in Step #2? Let’s bring it back.

In the "New Business Co-Sell Targets" matrix in this section, the y-axis represents the prospect accounts’ ICP scores from lowest (bottom of the y-axis) to highest (top of the y-axis). The x-axis represents the prospect accounts’ “partner co-sell scores” from lowest (left side of the x-axis) to highest (right side of the x-axis).

The prospect accounts with the highest ICP scores and highest “partner co-sell scores” fit into the upper right-hand quadrant. Airship looks to the upper right-hand quadrant to identify the best opportunities for co-selling with a given partner (These are the accounts with the highest “partner impact score”).

In the example below with hypothetical partner Vidzin, prospect account Imaaga has a “partner co-sell score” of 3.16 and an ICP score of 80. This account belongs in the bottom left-hand quadrant slightly below the middle of the y-axis (since its ICP score is 80, slightly below the half-way mark of Airship's 70-100 ICP range, and its "partner co-sell score" is relatively low). Meanwhile, Hextall & Co. belongs in the upper right-hand quadrant since it has a high “partner co-sell score” (12.2) and high ICP score (100).



Yule suggests actioning each quadrant of the matrix like so:

- Upper right-hand quadrant (High ICP score AND High partner co-sell score aka High Partner Impact Score!) – These are the prospects you should request introductions into from your partner and/or develop a GTM strategy for co-selling to these accounts with your partner. Prioritize these prospects with your partner.
- Upper left-hand quadrant (High ICP score, Low partner co-sell score) – Consider ABM or direct outreach through your SDRs for these prospects. Since there is not a high “partner co-sell score,” do not engage your partner in brokering an introduction. Alternatively, if you have an integration with your partner in which your product could add value for the prospect, you and your partner could target the prospect together. For your top partners, your partner’s brand reputation and your combined solution could help open the doors to the prospect.
- Lower right-hand quadrant (High partner co-sell score, Low ICP score) – These prospects may require more effort from your team considering the accounts do not align as heavily to your ICP; however, you should engage your partners in accessing these accounts and accelerating the conversation. Yule suggests there may be unsuspecting deals lurking in this quadrant.
- Lower left-hand quadrant (Low partner co-sell score, Low ICP score) – De-prioritize these prospect accounts – focus on the other three quadrants.

By organizing the prospect accounts in a matrix, you now have a highly targeted list for co-selling with a given partner! Is it too soon to celebrate?



### Framework #2 A 4-step framework for accelerating opportunities with tech partners

*This framework is from Rajiv Ramanan, Director of Startup Program and Technology Alliances at customer and employee engagement software suite Freshworks.*

By using **this framework**, Freshworks has received more than 120 pre-qualified opportunities from participating partners in 2020 – with their time to close for these deals being 50% faster than any other sales channel. Conversely, they delivered more than 370 opportunities to their partners in 2020 through direct introductions.

**Best for:** Picking a strategic shortlist of customers to introduce your tech partner into, and having them do the same. Use integrations as a growth strategy to close opportunities by inciting a flurry of same-day introductions

- **Step #1 Map your prospect accounts to your partners customer accounts**

Use a PEP to discover overlaps between your "prospects" or "opportunities" and your partner's "customers."

These are the **accounts your partner can help you close by promoting the integration.**

- **Step #2 Map your customer accounts to your partner's prospect accounts**

In your PEP, map your customer accounts to your partner's prospect accounts.

The resulting overlaps are the accounts **you can help your partner close** (give love, get love in return!).



## Indispensable Tactics: Execute



### ● Step #3 Segment the account list to ID potential integration adopters

Consult with your customer success team to see which accounts from Step #2 would be most likely to adopt the integration you have with your tech partner. Of those accounts, identify which accounts:

- Fit your tech partner's ICP (e.g. if they're targeting healthcare industries)
- Are in the region your partner is targeting (e.g. if they're targeting EMEA)
- Your team has the best relationships with (hey, Fred, I think you're gonna like this)

Now, you have a **segmented list of accounts you can help your tech partner close.**

Ask your partner to do the same for you for the accounts from Step #1.

### ● Step #4 Swap same-day intros

Get everyone in a room —

- Your sales and customer success reps responsible for the accounts from Step #3
- Your partner's sales and customer success reps responsible for the accounts from Step #3
- Your partner
- And you!

Keep the meeting focused:

- Make sure both sides understand the value of your joint solution
- Educate your partner's team about your product
- Have your partner educate your team about their product
- Finetune your customer success reps' pitches for offering your customers an intro to your partner's sales reps (and vice versa)

## ● Indispensable Tactics: Execute



Ramanan says, "We do a very quick session where our sales reps talk about our product with the partner rep, and the partner rep does the same for their product, and we talk about the joint integration value."

YOUR TEAM	YOUR PARTNER'S TEAM
Educates partner about their product	Educates your team about their product
Discuss the value of their joint-solution	
Define the solution-selling messaging	

It's go time. Your customer success reps pitch the integration to their shortlist of accounts from Step #3, and your partner's customer success reps pitch to theirs. If the accounts are interested, swap same-day intros.

"We come out with a pitch that we'll send to each of our respective customer lists on the same day, on behalf of our partner," says Ramanan. "We tell the customer, 'Hey, we work with this partner, there's a great solution that we have together, would you like to try it?' If the customer says yes, we introduce the partner right away."

### Principles for co-selling

- **Beware of being a taker and not a giver**

Unequal partnerships are always a risk but when exchanging something as valuable as relationships, it can get dicey. Setting expectations for the correct exchange cadence is key – if you are accused of being more of a "taker" you can use the agreement to reset expectations.

Note that "unequal" doesn't always equate to uneven. It may very well be the case that one party is much larger than the other and, by definition, brings more to the table. This is fine. What's important is that the expectations around relative contribution are established in advance and the path to creating the desired outputs is agreed upon.

## ● Indispensable Tactics: Execute



But the most common reasons that lead swapping agreements become unequal are bad process and no resources.

"I've had partners say 'Hey you keep asking and we don't get anything in return!' says Jambor. "So then I say 'But you never ask for anything! I'll give you all sorts of referrals, just ask for them!'"

If it's a bad process that is resulting in the inequity, set a recurring meeting or phone call where each side is expected to bring a set number of leads. You can start small, but the consistent process makes it easy to hold up your end of the bargain.

If it's lack of resources that is resulting in the inequity you'll either need to dial back expectations or ask for support. In extreme cases, you may have to do your partner's work for them so they see value. Some partnership teams even make "leads shared with partners" a KPI for their internal teams so their teams have an incentive to make their lead swapping agreements more even.

But partner managers (and sales teams) can change.

"So many companies just get request after request from their partners. There needs to be more 'This is how I can help you' in your messages to partners," says Chris Formosa, Head of Global Technology Partnerships at Contentsquare.

### ● Optimize for trust

Sometimes, in co-selling relationships, a customer may say that they prefer you but not your partner. In these moments it may be tempting to ditch your partner and close the sale. Word gets around when you don't do right by a partner.

"That is a complete breach of trust," says Mike Nevin, Managing Director of Alliance Best Practice. "Co-selling is winning or losing together. It's surprising when that partner goes back to the same partner with another opportunity. And that second partner tells them to 'get lost'. Because you are not to be trusted."

## ● Indispensable Tactics: Execute



As a partner manager, you are responsible for communicating to your sales team the expectations here. A short-term sales win by ditching a partner can submarine this and future efforts. Think long-term, trust your gut, and move forcefully if anyone violates this trust.

"The most important thing is transparency," says Ramanan.

Have a conversation with your partner to discuss your expectations and the specific steps you and your partner will take to meet those expectations — and follow through. Cody Jones at Zapier prioritizes their partners' business objectives from the start.

"Whenever we show up to one of these meetings and it's the partner manager, we win their trust by wowing them with what's possible," says Jones. "We've looked at their API docs, we've crafted solutions, we have a pitch deck, we have a go-to-market plan. We're making the partner manager look awesome. They can go to their team and say, 'Hey I just sourced this super cool opportunity, let me show it to you.'"

The key here is giving them as much documentation as possible to help the partner envision your better-together future. Slide decks, potential GTM messaging, and even mockups of a potential integration.

"I want to make them look like a hero, and if I do that they are going to open the door to product or engineering or marketing," says Jones.

"There's an 80/20 rule, or if you're lucky, a 60/40 rule, where 20%-40% of your partners will be the ones that are really driving business with you," says Corinne Bartow at MX. "Not every partnership you develop is going to do that, so the better you know their business and understand that fit and how you're going to market with them, the better you can predict which ones will be successful."

## Indispensable Tactics: Execute



- Remember your mutual goals

Remember our formula from the **Source** section:

$$\text{Available shared data} + \text{What your company needs} + \text{What their company needs} = \text{Partnership plan}$$

What are your KPIs each quarter? What are your partner's KPIs each quarter? How can you join the two sets of KPIs together to make your own kind of well-oiled machine to satisfy both companies' needs.

Defining your mutual goals at the start of your partnership is critical for making sure you're working towards the right results together. Otherwise, your partner might not realize your main objective is to tally up intros into your partner's customer accounts to leverage integrations as a growth strategy — until dozens of missed opportunities later.

"Understanding what the other individual wants is paramount. What are they trying to influence? What are their key metrics? I may have to ask a few different ways, but once they tell me they give me the roadmap to what they care about," says Cody Jones at Zapier.

Jake Wallace, Head of Global Technology Partnerships at Trustpilot, says his team prioritizes net new leads each quarter. He finds it easier to achieve proper attribution when his team and his partner's team align for each stage of the sales cycle. Not only is it easier to measure the results, but it's also easier to set the bar higher.

In some cases, defining your mutual objectives at the partnership's launch can help you set the bar even higher.

"We've actually set that number of leads higher because we have that shared goal in mind of co-selling and leveraging Crossbeam to uncover that data," says Wallace. "A high percentage of our goal is with our key partners because we're on the same page."



### ● Maintain a cadence

You might have noticed that some of the plays we've shared thus far (Shipware's role-based partner pairing, ActiveCampaign's co-marketing playbook, RollWorks's "co-marketing flip," to name a few) can attribute their success to beating to a shared partnerships *rhythm*.

"To grow a partnership, there needs to be a heartbeat," said Mike Stocker back on page 69.

Establishing a cadence — whether for your co-marketing campaigns, checking in with partners for new co-selling opportunities, or making time to funnel energy into your sales team's strategic target accounts each week — helps you build a momentum that everyone involved in your partner program can ride. Some cadences we've seen work:

- **The 2-2-2-2 meeting.** Every two weeks, bring two leads for your partners, ask them to bring two leads for you and then you each find two accounts you can solution-sell together. 1. Familiarity with your joint value. 2. Familiarity with your partners.
- **X per quarter.** Good for early in the partnership, pick a low-but-manageable number of co-sell targets to exchange each quarter. Set reminders throughout the quarter to make sure you deliver and to remind your counterpart.
- **Workflow automation.** Using a PEP like Crossbeam, you can set up automated alerts to email or Slack when new overlaps appear that meet the specific criteria required for co-selling. Partner managers or reps can use the alerts as to-do items to make introductions.
- **Pre-write email outreach sequences.** Work with your partner to establish the number of leads you're exchanging. Then co-write a multi-call script series or email scripts, and share with marketing and SDRs on both sides. Be sure to include both partners' names in any subject line with a link to book time with an AE. This applies mostly to prospect-to-prospect campaigns

Your team and your partner's team will know what you expect from them and when you'll be reaching out. In the case of the bow-tie funnel (Learn about the bow-tie funnel on page 41), every stakeholder knows exactly what's supposed to happen at each stage of a partner's onboarding and how they need to play a part in growing the partner.

## Indispensable Tactics: Execute

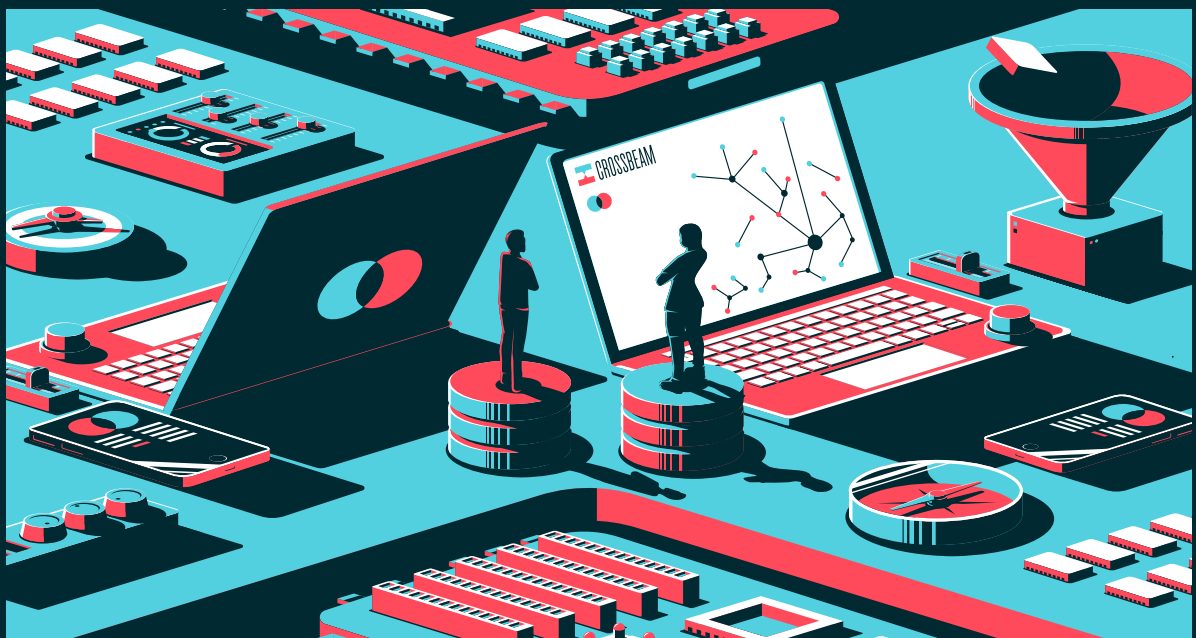


Structuring processes like the partner journey and partnership maturity curve puts a standardized timeline into play and brings clarity to:

- Your partner program goals
- Your internal team's workflows
- Expectations and responsibilities of your partners
- A standardized window for evaluating and pivoting your partnership strategy if needed
- Repeating touchpoints over time that your team can analyze to determine leading indicators of success

One more thing: Your leadership team can follow along in the process, know your next moves, and have confidence in the results.

Establishing cadences is a great step towards developing your partner program's Ecosystem Ops. A steady drum beat can keep your entire team moving along the same wavelength.





# Get credit for it!

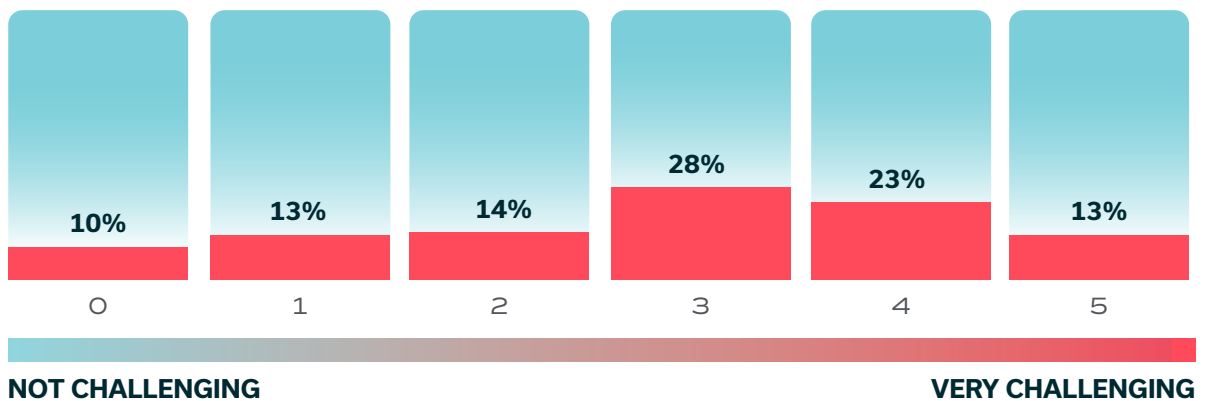
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Do work, get credit. Do work, get credit. If only that was how it worked in the partnerships world.

According to our 2020 [State of the Partner Ecosystem reports](#), getting attribution is a challenge for most partnership professionals:



### Getting Proper Attribution for Any Revenue You Drive



It's not just you, it's nearly everyone.

Tracking attribution for opportunities that close with the help of sales, marketing, and partnerships can make things really fuzzy – especially when the nature of partnerships is that every deal the partnerships team sources has multiple hands in the pot.

"[Our partners] will have an event or lunch and learn and mention us to a potential customer. That person gets home, Googles us, fills out a form on our website and we see that as an 'organic' lead," says Garrett Helmer at Vasion. "But we know a lot of that is driven by channel."

We'll skip over some of the most common attribution challenges, because we know you know. Instead, we'll share some of our learnings from partnership professionals doing their best to solve attribution challenges.

Daily affirmation: **Because you deserve all the credit you can get.**

**Partner-influenced revenue** (think: getting an intro into an account to accelerate a deal or getting a referral from your partner) is much more likely to get lost in translation. In the beginning stages of your partner program, stick to partner-sourced revenue. Then, when you have results to show and the buy-in and resources you need to bring partner-influenced revenue into the mix, it's game on.



## Get Credit

Here's how to make sure your partner-influenced revenue is crystal clear up until the day of the sale:

### **Track keywords.**

It's likely that your sales team is recording their sales conversations with target accounts using platforms like Gong and Chorus. Set up notifications for anytime a partner or integration is mentioned during their calls. Notifications will keep you informed and save you the time and headache of backtracking to see if a partner influenced a deal.

"A lot of times on these Gong recordings, the prospect will say, 'Oh, I heard about you guys because of your integration with SalesLoft,'" says Carina Shahin at Sendoso. "And that's a huge indicator that the account is influenced or generated by SalesLoft."

Shawn Li, Senior Director of Partnerships at Conversica, says to focus on the partner's direct impact rather than how much the partner impacts the deal.

"The team is more focused on the substance and the cumulative impact, how you move the needle, versus how much you move the needle," says Li.

### **Connect your PEP to your CRM and communication tools.**

If you're using a PEP, make sure to connect it to your CRM so your sales team knows exactly which accounts could influence a deal whenever they're checking their account dashboards.

Having your partner data directly in the CRM will also keep your partner's name front-and-center throughout the sales cycle – making their influence more difficult to get lost in translation. If you're using Crossbeam, you can pull your partner data directly into [Salesforce](#) and get instant [notifications sent to Slack](#) each time an overlap is found between your accounts and your partner's accounts.

### Create partner-specific accounts in your CRM.

Tag your partner as the influencing partner in your CRM. But wait, what if your partner is also your customer?

Airship has created a "parent" and "child" account for every account in its Salesforce CRM. The "parent" account represents the "customer" version of the account and the "child" account represents the "partner" version.

For example, if Stitch is a customer and a partner, you can create a "parent" account (think: master record) for the customer account and a "child" account for the partner account. If the sourcing partner for a given deal is Stitch, the correlating "Stitch-Partner" child account ties directly to the opportunity (and lives within the parent account so everything stays neat and tidy!).

Take a look at this example of a partner-influenced deal. If Stitch was the "influencing partner" for a particular target account, the corresponding box for "Influencing Partner" would read "Stitch - Partner."

Partner Sourced/Accepted Date 1/26/2021

Influencing Partner *[edit]*

Influencing Partner Type *[i]* Cloud *[edit]*

Influencing Partner Contact *[i]*

Influencing Partner Manager *[i]* Forest Yule *[edit]*

Influencing Partner Notes *[edit]*

Influencing Partner Assigned Date *[i]* 2/4/2021

*Source: Forest Yule at Airship*








When you click into the "Stitch-Partner" account, the account record type reads "Partner."

Details	Related	Activity
Type	Partner	<i>[edit]</i>
A1 Account <i>[i]</i>	<input type="checkbox"/>	<i>[edit]</i>
A2 Account <i>[i]</i>	<input checked="" type="checkbox"/>	<i>[edit]</i>

*Source: Forest Yule at Airship*

The partner account exists as a separate account that lives within the customer record. This helps you organize your customer and partner accounts and avoid confusion during the reporting process. The account name in the image below would be "Stitch - Partner" and the "Ultimate Parent" box would read "Stitch."

## Get Credit

Account Name	
Parent Account	
Ultimate Parent	
Account Owner  Forest Yule	
Sales Development Representative	
Phone	
Website	

*Source: Forest Yule at Airship*

This organization helps Airship's partnerships and sales team track **partner attribution** (or credit for the revenue you drive through partnerships) and avoid ambiguity when partnering with companies who are also Airship's customers.

See? A simple hack to your CRM can keep your partner's influence clear throughout the sales cycle. If you're just starting to invest in Ecosystem Ops, a good place to start is here!

### **For tech partnerships, develop a formula for calculating retention.**

For cases when you're not getting direct intros into net new accounts through your tech partners, your tech partners still have a huge impact on your bottom line. Analyze your integration data over time (refer back to page 6) to determine how the number of integrations your customers adopt correlates to your retention and renewal rates.



## Get Credit

Brian Jambor, Head of Partnerships at Sendoso, says "A good integration should improve your retention numbers by 20-40%."

Remember how RollWorks observed that their customers who are using partner integrations **renew at a rate approximately 30% higher** than customers who don't.

And Contentsquare knows which integrations combined lead to **90% gross revenue retention** (recurring revenue year over year) after analyzing their more than 800 enterprise customers.

"We capture all of the touchpoints with integrations, so we know how many integrations are deployed, how many accounts, how many API calls," says Gilad Zubery, EVP Global Business Development and Partnerships at Contentsquare. "We re-slice and dice the data. We've done that over the years at Clicktale and now Contentsquare. I can tell you how many integrations and what type of integrations lead to a higher gross retention and increase in upsell opportunities."

"The real value of Zapier is we help our SaaS partners close more sales because they now connect with everything, and our partners typically see around a 40-50% reduction in churn of their users that are using their product with Zapier," says Cody Jones at Zapier.

### Brag. A lot

Share partnership success stories in Slack, at the top of your internal presentations, and at the coffee station. Just as your sales team celebrates their wins, you should do the same. The more you make partnerships part of your team's everyday conversations, the more that partnerships will be top of mind for your entire team.

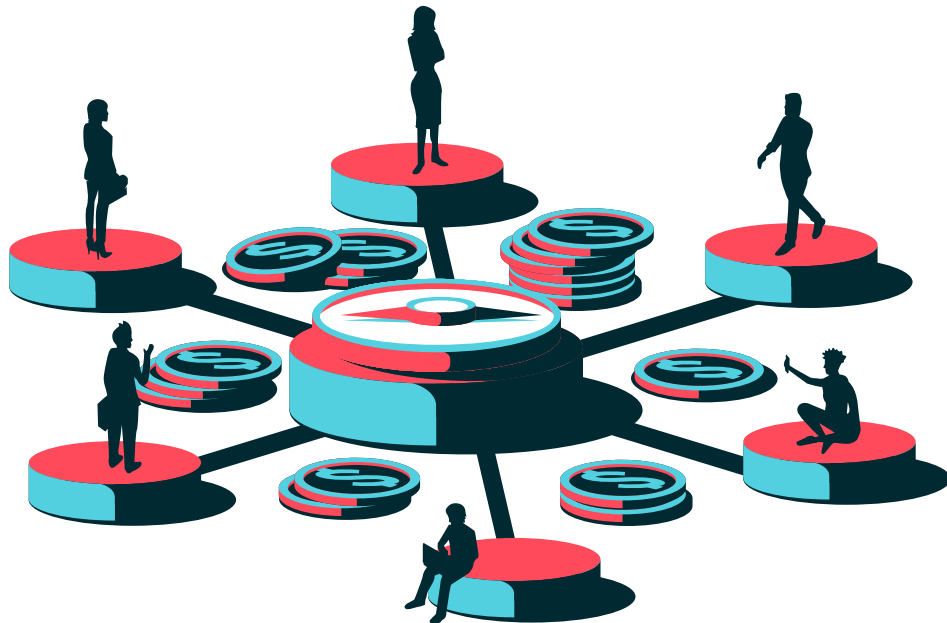
Try wearing pants from your 20s when you're 40, and they might look a little outdated, fit a bit differently, and just not feel right. You change, so your clothes should change, too.

The same goes for your partner ecosystem. The partnership plays that work at one point in time may not be as effective at another.

## Get Credit

Invest in Ecosystem Ops now to help you manage your workflow and partnership documentation in ways that future hires could easily pick up. Then iterate as you anticipate more work, more moving parts, and more parties involved.

You'll likely run the **Source, Decide, Enable, Execute** framework several times over the course of a long-running partnership, so get creative!





# Closing: The 3 Things to Remember

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That was a lot to take in, but rest assured, there won't be a pop quiz. You can keep this playbook by your side and open it up on a warm summer day — or when you need hard advice about incentivizing your sales team. *This book is your partnerships sidekick.*



## Closing: The 3 Things to Remember

At Crossbeam, we spend every day speaking with partner professionals. And while there are an endless amount of strategies to consider, we've found that there are three universal truths to partnerships.

- 1. No two partnerships are alike.** Each company has its own products, cultures, timing, budgets, and history. It's difficult to create a fool-proof process to take this all into account.
- 2. You are in the relationships business.** You are dealing with human beings, not just computers and spreadsheets. This is what makes partnerships fun and rewarding but also complex. Never allow business goals to get in the way of your humanity.
- 3. Stay curious.** The only thing constant is change. Commit to strong opinions loosely held. No one has a monopoly on the best practices for partnerships and they never will. Be open-minded and committed to finding the best answer for your unique circumstance (see takeaway #1).

The market changes so quickly that a best practice in June can be obsolete by December. We encourage you to do your best to absorb the wisdom of your peers and take your career growth seriously.

### We do this all day, every day.

The Crossbeam team is on hand to answer your partnership questions and happily give you a custom walkthrough of our partner ecosystem platform. Crossbeam customers:

- Account map 20x faster
- Have increased their pipeline by 15%
- Have closed \$500k in just a few months

What people are saying about Crossbeam on G2:

- "So far this year, it's helped my team add \$10M ARR in pipeline."
- "It saves days and weeks when kicking off new partnerships."
- "25% of our pipeline can be attributed to Crossbeam"



## Closing: The 3 Things to Remember

"Rather than having to spend countless hours simply just updating data, an activity that hinders productivity, I can now just log in to Crossbeam and examine my reports knowing that everything is up-to-date and accurate," says Ryan Klekas at Bombora. "I get to skip the 'wasting time part' and jump directly into the 'be productive' part. That's pretty huge."

"Crossbeam is free. I mean, the worst thing it's gonna do is create a lot of efficiency for your team. And at no cost," says Alyshah Walji at Vidyard.

**Sign up for a free account at [crossbeam.com](https://crossbeam.com).**

