

# Uncover new deals and accelerate sales with partners

PartnerTap helps sales teams connect directly with reps at each partner and identify new sales opportunities in each territory.

## Sales collaboration with partners drives billions of dollars of sales every year

Your best sales reps already work with partners. They reach out to a partner rep to get insight on a prospect. They ask another partner rep to keep their ears open about competitors stalking your customers. And they share opportunities when they see a chance to bring their trusted partner into one of their existing customers.

Today for most companies this collaboration is painfully inefficient and insecure. Sales reps share customer lists, account list spreadsheets zip around the email-sphere, and your account executives spend hours pouring through partner account lists trying to identify their mutual accounts and new opportunities.

And remember sales kickoffs and partner happy hours? The reason account executives spend their evenings at happy hours with other partners is to identify which reps are selling into their territory and which reps can help them sell more of your products or services.

If you are in sales, you know the drill. Hours, days and too many evenings wasted on partner sales reps that don't share any accounts and sell into completely different regions. A total waste of time.

That's why we built PartnerTap. To immediately connect your sales reps with the right partner rep on each account. **PartnerTap Sales Team Editions makes it easy for sales reps to identify shared accounts, share insights, and drive more revenue with trusted partners.**

TRUSTED BY ENTERPRISE  
COMPANIES THAT KNOW  
HOW TO PARTNER

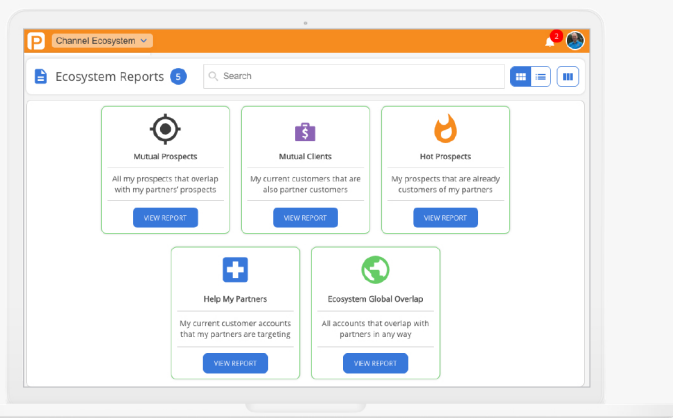


## Identify new sales opportunities

Depending on the level of information your partners choose to share with you, you could see each partners' current customers, prospects, and assigned sales rep for each of your accounts. Your mapped accounts can be viewed online or downloaded into Excel.

Ecosystem reports identify accounts where you can drive more revenue with partners:

- **Hot Prospects:** see your prospects that are already existing customers of your partners
- **Mutual Prospects:** your prospects that are also your partners' prospects
- **Mutual Clients:** your joint customers with each partner

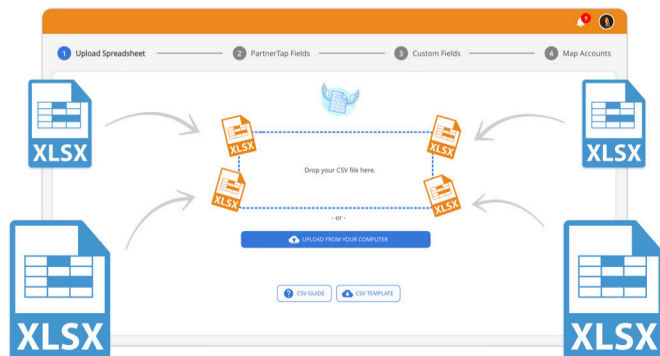


# How PartnerTap works for sales teams

## 1 Automates account mapping with each partner

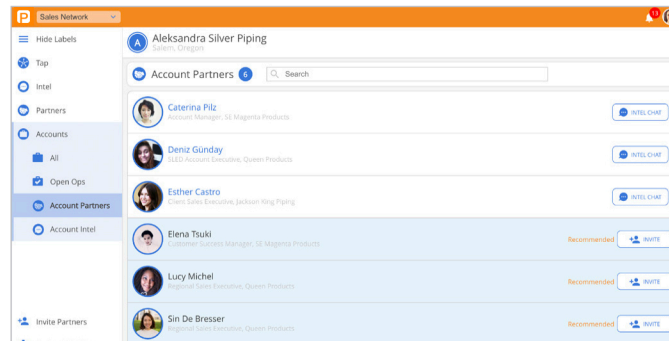
Figuring out which partners can help you with an account should be as easy as finding someone on LinkedIn – with PartnerTap it is. PartnerTap automates all your account mapping with each partner. Simply upload all the different spreadsheets you've received from partner reps, or invite them to connect with you directly on PartnerTap, and you will instantly see which partners are selling into the same accounts in your territory. There are two ways to automate account mapping:

### Upload spreadsheets



Simply upload your partner account lists with our Spreadsheet Upload utility.

### Invite partners to connect

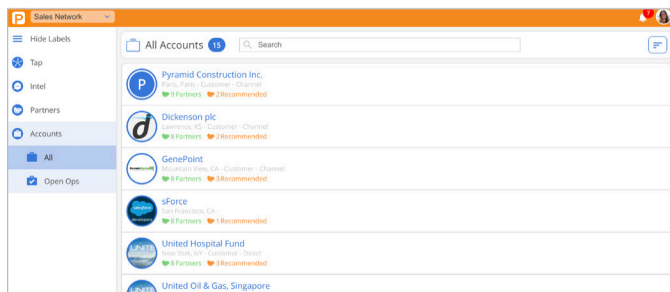


Invite your partners to connect their CRM accounts directly via PartnerTap. When CRM systems are connected you will have *real-time account mapping visibility* even during territory re-alignments and when a partner rep leaves a team or company.

## 2 See your matched partners on each account

With PartnerTap it is easier to find a partner sales rep on your account than using LinkedIn. When you and your partners connect your CRM systems to PartnerTap you will always see the current account owners on your matched accounts at each partner. We keep your accounts mapped and sales owners updated during times of transition, like territory re-alignments and sales rep departures. There are two ways to see the sales owners of each account:

### Inside PartnerTap



Pull up any account in PartnerTap and you will see all of the partner sales reps also assigned to that same account.

### Inside Salesforce

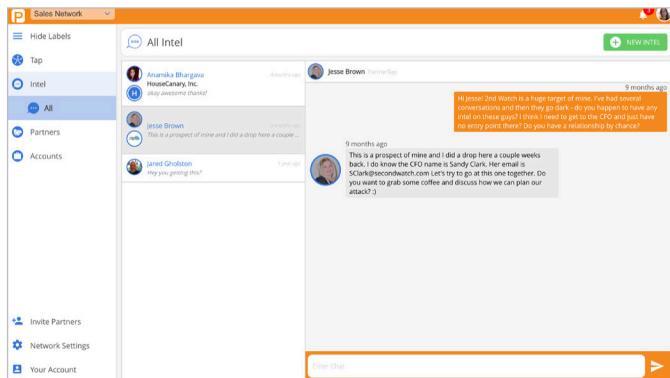
| Partner Company  | Chat Co. | Chat Link | Connect Link | Opps Sh. | Opps Sh. | Partner Rep Name         | Partner Rep St. | Partner Title            |
|------------------|----------|-----------|--------------|----------|----------|--------------------------|-----------------|--------------------------|
| PartnerWorks     | 0        | Chat      | CONNECT      | 1        | 0        | Jesse Brown              | Accepted        | DemoAccount              |
| Cook Enterprises | 0        | Chat      | CONNECT      | 1        | 2        | Gene Cook                | Accepted        | Engineer                 |
| PartnerTap       | 0        | Chat      | CONNECT      | 1        | 2        | Jared Chilton            | Accepted        | VP Customer Success      |
| PartnerTap       | 0        | Chat      | CONNECT      | 1        | 2        | Rusty Williams           | Accepted        | VP Customer Success      |
| Cook Enterprises | 0        | Chat      | CONNECT      | 0        | 0        | Gene Cook                | Accepted        |                          |
| PartnerTap       | 0        | Chat      | CONNECT      | 0        | 0        | Jesse Brown              | Accepted        | Sr Account Manager       |
| PartnerTap       | 0        | Chat      | CONNECT      | 0        | 0        | Joan Shea                | Accepted        | Operations Officer       |
| PartnerWorks     | 0        | Chat      | CONNECT      | 0        | 0        | Jesse Brown              | Accepted        | DemoAccount              |
| PartnerTap       | 0        | Chat      | CONNECT      | 0        | 0        | AUTUM DEMO ACCOUNT GRIMM | Accepted        | Sales & Marketing        |
| PartnerTap       | 0        | Chat      | CONNECT      | 0        | 0        | Mark Florio              | Accepted        | Senior Account Executive |

If your sales team uses Salesforce they can see all their matched partner sales reps on each account right inside Salesforce. This is available with our "Inside Salesforce" option.

## 3 Share account insights with built-in chat for partner sales collaboration

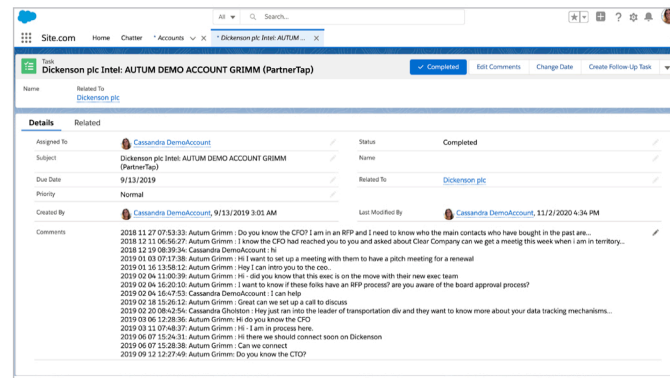
Built-in chat makes it easy for your sales reps to swap insights with partners about specific shared accounts. Once two sales reps are connected on an account, they simply hit chat and start a 1:1 conversation. All intel-swapping conversations are automatically saved as activities in BOTH companies' CRM system.

### Chat



Our customers find that partner reps share richer information about their customers and prospects over chat than they do over email.

### Activities saved in CRMs



Sales managers and executives appreciate that all partner rep conversations are captured automatically in both CRMs – helping the next account owner get up to speed.

## 4 See your partner ecosystem influence on sales

Our ecosystem dashboard gives everyone a better understanding of who engages with partners and how partners influence your pipeline and revenue.

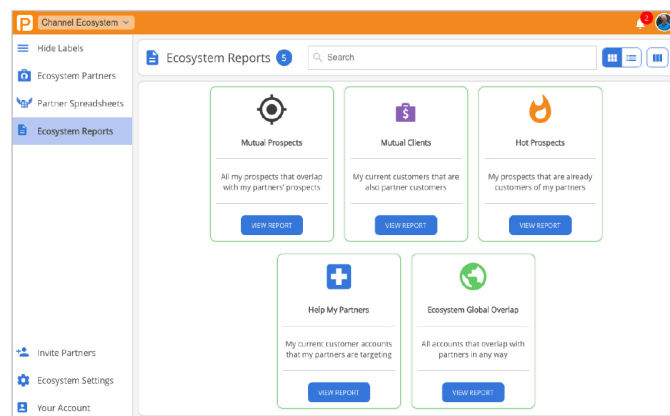
### Co-selling activities and influence

A screenshot of the PartnerTap ecosystem dashboard. It shows a table of account exchanges. The table has columns for 'Account Name', 'Partner Rep', 'Partner Title', 'Organization', 'Exchanges', and 'Date'. The data is as follows:

| Account Name                   | Partner Rep     | Partner Title          | Organization                 | Exchanges | Date       |
|--------------------------------|-----------------|------------------------|------------------------------|-----------|------------|
| Accelerated Resources National | Charles Thomas  | Sales Development Rep  | South King Textiles National | 2         | 11/05/2020 |
| Akari Animal Resources         | Stephen Holmes  | Client Sales           | Gold Logistics               | 1         | 11/04/2020 |
| Aleksandra Human Tech Corp     | Luca Brown      | Account Manager        | Hoang Magenta Farming        | 2         | 11/04/2020 |
| Baron Accelerated Veterinary   | Jamal Tsuki     | Client Sales Executive | South King Textiles National | 3         | 11/05/2020 |
| Chengxi King Seafood           | Zane Fletcher   | SLED Account Executive | South King Textiles National | 2         | 11/05/2020 |
| Chengxi King Seafood           | Luca Brown      | Account Manager        | Hoang Magenta Farming        | 2         | 11/04/2020 |
| Fletcher Silver Farming Media  | Renaldo Kaper   | Client Sales Executive | Hoang Magenta Farming        | 2         | 11/05/2020 |
| Human Logistics Incorporated   | Charles Thomas  | Sales Development Rep  | South King Textiles National | 1         | 11/04/2020 |
| Jafari King Plumbing           | Daniel Gauthier | SLED Account Executive | Hoang Magenta Farming        | 1         | 11/04/2020 |
| Lee First Utilities            | Renaldo Kaper   | Client Sales Executive | Hoang Magenta Farming        | 2         | 11/05/2020 |

PartnerTap tracks the level of partner engagement across sales reps and also at the account level so you can measure the impact of co-selling with partners.

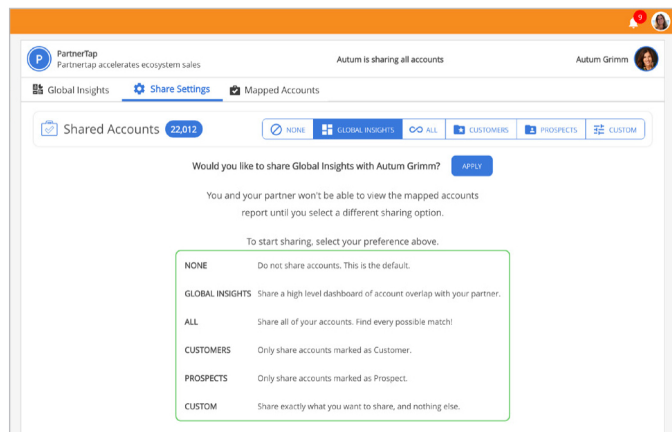
### Partner influence on revenue



Measure partner influence on pipeline and closed deals across all of your partners. Use this data to create specific plays to drive more revenue within important segments or regions.

With PartnerTap you get full control over which accounts and what information you share with each partner. Our enterprise share settings make it easy to protect sensitive accounts, define the types of accounts, and which fields you want to share with each partner.

## Share settings



You decide which types of accounts and information you want to share with each partner. Share Settings let you maintain full control over your sharing on a partner-by-partner basis.

## Enterprise security

TRUSTED BY  
ENTERPRISE  
COMPANIES  
THAT KNOW  
HOW TO PARTNER



mazars

SAP Concur

WageWorks

Enterprise-class infrastructure, security and reliability helps PartnerTap sail through IT security. PartnerTap follows all SOC2 compliance practices.

***We saw an ROI in the first quarter using PartnerTap. We closed two new customers and accelerated the sales cycle on numerous other prospective accounts.***

George Gadebusch, VP Technology & Product Sales, World Travel, Inc.

## ABOUT PARTNERTAP

PartnerTap helps companies generate more revenue from each partnership. The PartnerTap Ecosystem Platform helps channel and sales teams identify the biggest revenue opportunities with each partner and share relevant information to drive more revenue from shared accounts. PartnerTap makes it easy to invite partners, control what data you share, automate account mapping, and identify the specific segments and accounts with the greatest revenue potential with each partner.

Please contact us for more information at [support@partnertap.com](mailto:support@partnertap.com) or visit us at [www.partnertap.com](http://www.partnertap.com).

## Enterprise security and popular acclaim

