PARTNERTAP GUIDE

Best Practices & Glossary

PARTNERTAP

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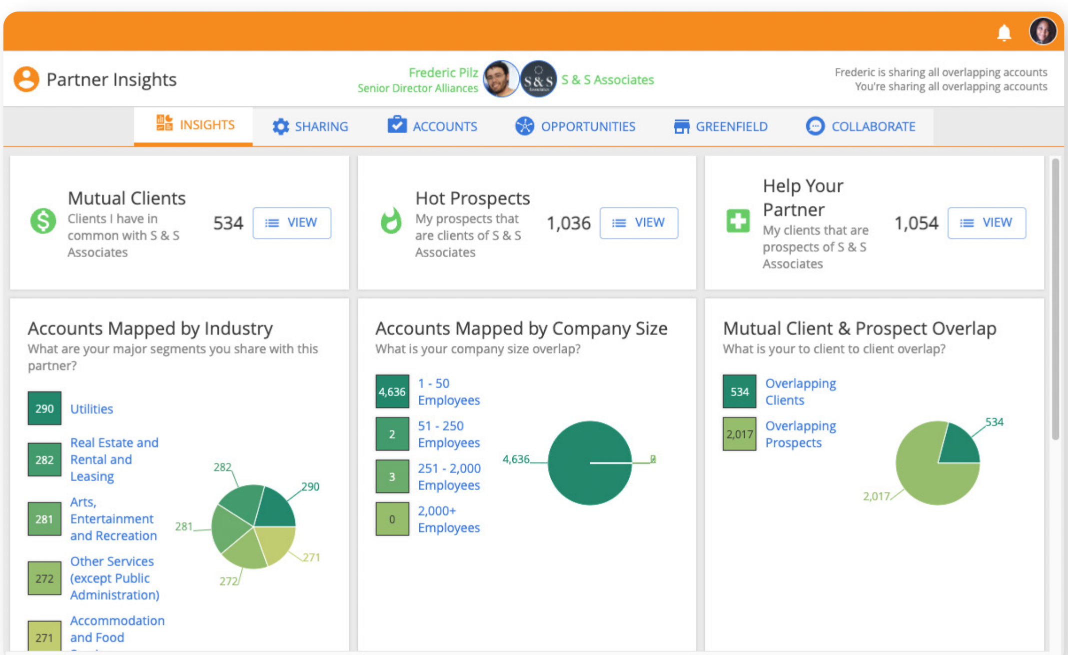
Account mapping and co-selling with partners

Encourage partners to connect on PartnerTap

The reason you're using PartnerTap is to account map with partners and find ways you can work together to sell more. The first and most important step is to [invite your partners to connect with you on PartnerTap](). Often, just sending the "Invite" from the app isn't enough. Emails can get lost in inboxes or partners are busy and may not understand what your invite means. We recommend you reach out to partners to give them a little context and encourage them to accept your invitation to connect on PartnerTap. PartnerTap provides collateral and resources you can send to your partners, including a datasheet explaining everything they can do with their free "Invited Partner Edition" of PartnerTap and a partner rollout guide with easy-to-follow steps.

1. **Invite regional and national partners** to connect with you on PartnerTap
2. **Email partners** the PartnerTap Rollout Guide and Free Invited Partners datasheet
3. **Call partners** to encourage them to accept your invitation and upload their account lists
4. **Introduce them to Jesse** for any questions or to help them get started quickly: [jesse@partnertap.com]()



Upload every partner account list you receive

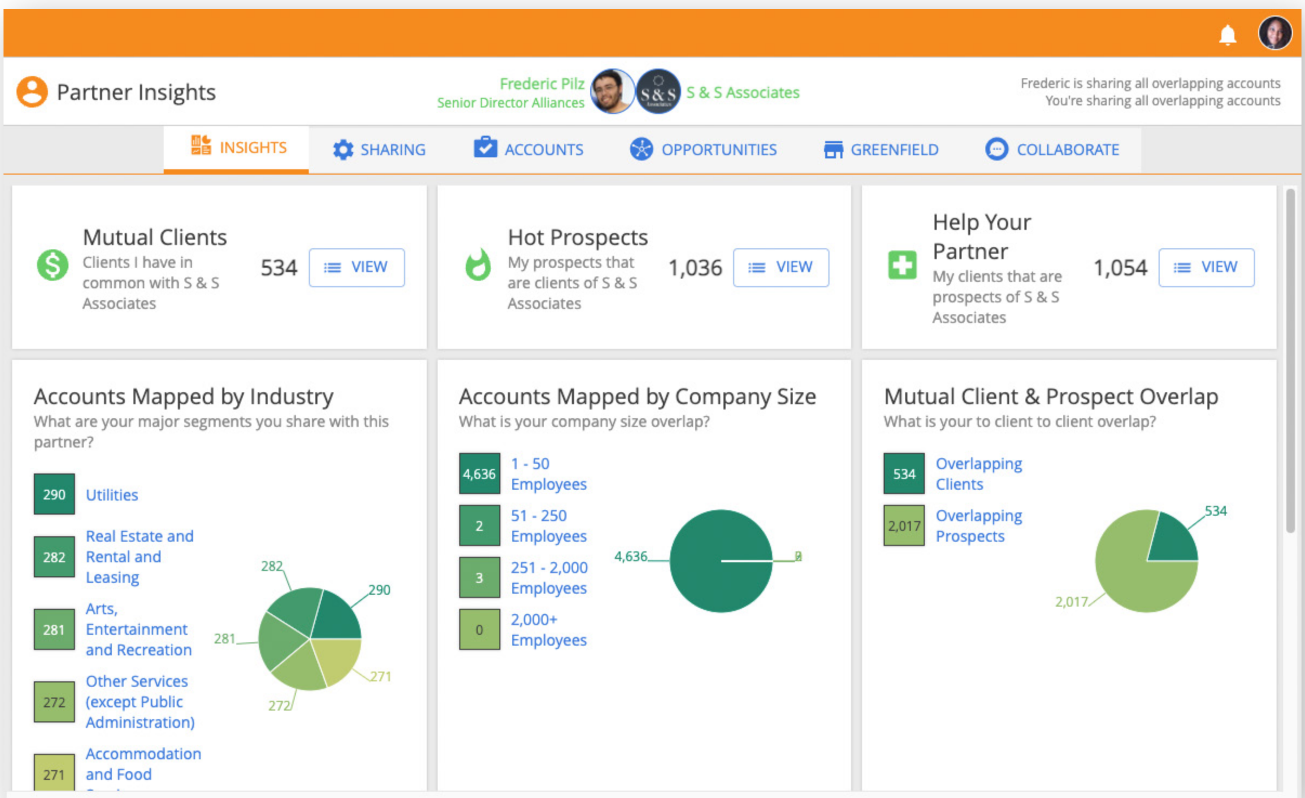
Once you login and see your accounts, you can immediately start uploading all of the various partner account lists you already have. This article will walk you through how to do that. Some lists may have thousands of names, others may only have 10 accounts. Uploading all of your existing partner account spreadsheets will instantly show you where you have overlapping accounts with each partner, where you have mutual customers, and where they could help you sell into a new account. The account mapping takes only seconds after you upload each spreadsheet.

1. Upload partner account lists every time you receive them to constantly enrich your multi-partner view of accounts
2. Analyze the Mapped Accounts report to find any partner customer accounts that are a good fit for your products
3. Export narrowed down list of target accounts for this partner. Email the narrowed down list back to the partner
4. Call partner and suggest they engage with you to target these accounts

Prioritize which partners to spend time with

Sometimes the partners you think aren't that important may actually have a wealth of customer accounts for you to sell to. Partner teams often spend a lot of time with the big-name partners only to find out that there aren't actually very many tangible opportunities to go after together. Until you have visibility into your **true market overlap** with each partner it's hard to know which partners to spend the most time with.

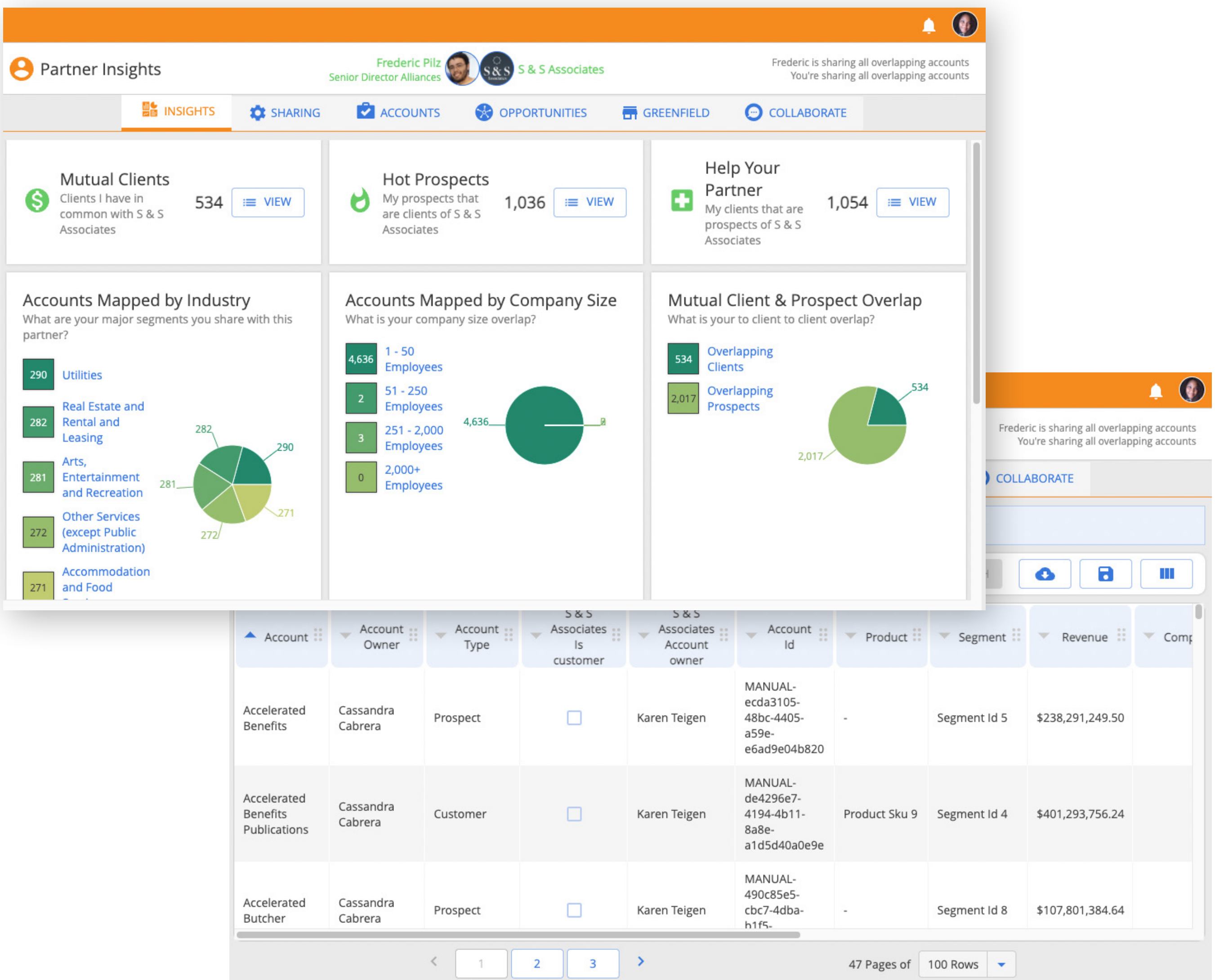
1. **View your Partner Dashboard** for each partner to see the macro overlap with each partner
2. **Prioritize** the partners with the most relevant account overlap with your industries, segments, products, territory, etc.



Prepare for partner planning meetings

Whether you meet with partners ad-hoc, annually, quarterly or monthly, each meeting will be a lot more productive if you go into the meeting with PartnerTap data and insights. Use the global insights dashboard to understand which regions, industries and segments have the biggest opportunities. Use detailed mapped account data to assure each account planning meeting will drive revenue for both sides.

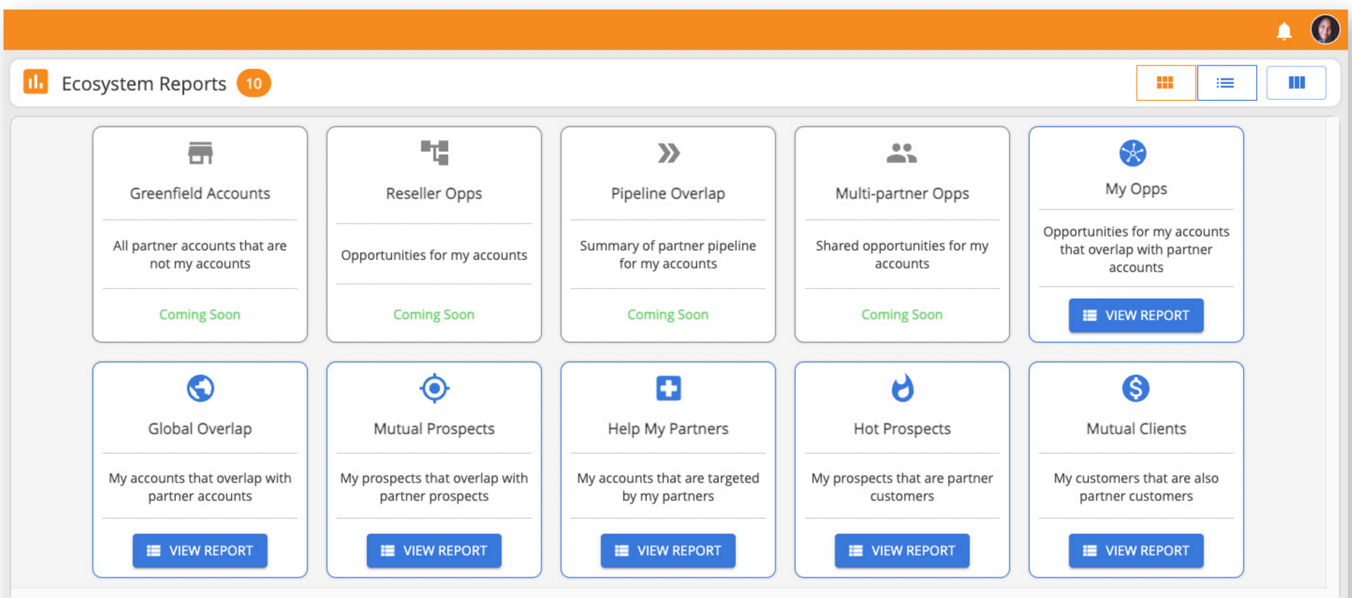
1. **View Partner Dashboard** to see the macro overlap with each partner
2. **Use Mapped Account reports** to identify specific accounts partner can sell to
3. **Review target lists** together with your partners to align reps on those accounts and provide lists to reps
4. **Coach partners** on how to see current account owners on each target account inside PartnerTap



Identify new commercial opportunities

Every time you account map with a partner you get actionable sales insights with that partner. Every time you upload a new spreadsheet, or connect directly with an additional partner, you build a richer multi-partner view of each account. You'll be able to see ALL the partners that have sold to an account, which partners already have each account as a customer, and even things like which products are installed, and any other insights partners have shared with you - in one easy to filter report. Our multi-partner account reports include powerful filters that let you zero in on accounts and source new opportunities that you can target with each partner.

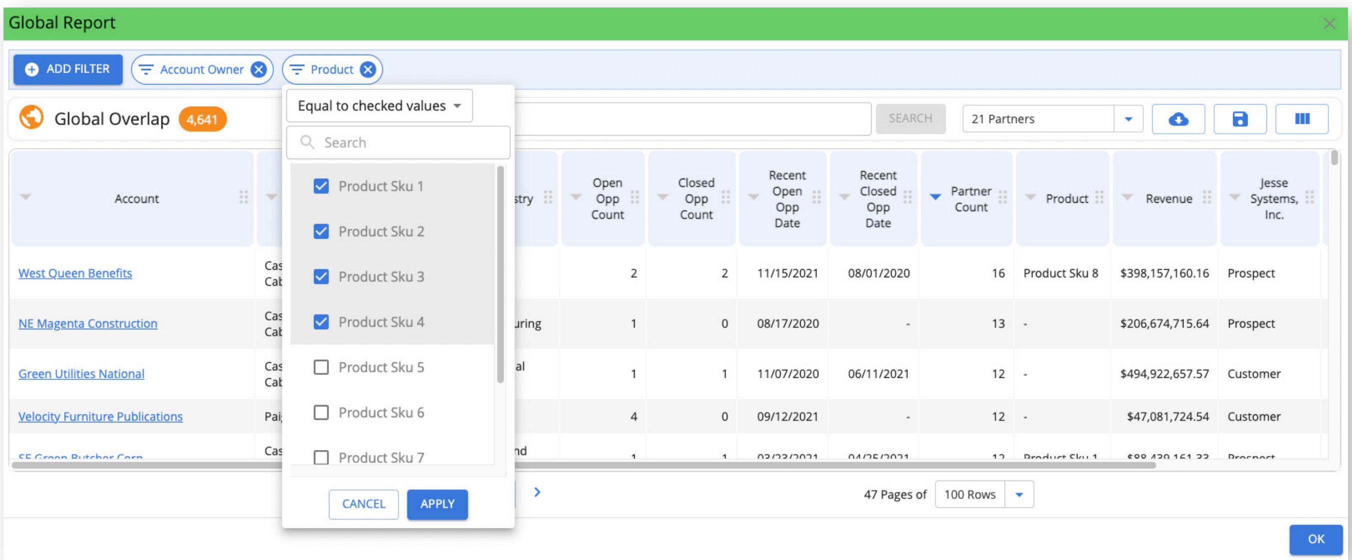
1. **Use the Ecosystem Global Overlap reports** to identify the *best partner* to help you sell into each account, and create lists of specific accounts that you could target with each partner
2. **Track any new opps** sourced from this list with a "PartnerTap Sourced" campaign in Salesforce
3. **Coach partners** on how to see the current owner for each account



Find the BEST partner(s) for each account

Sometimes winning a new account requires bringing in the partners with the right expertise or complementary solutions. Our multi-partner account reports let you analyze each partners' customers to see which partners truly have the relevant industry or technical expertise required to help you win.

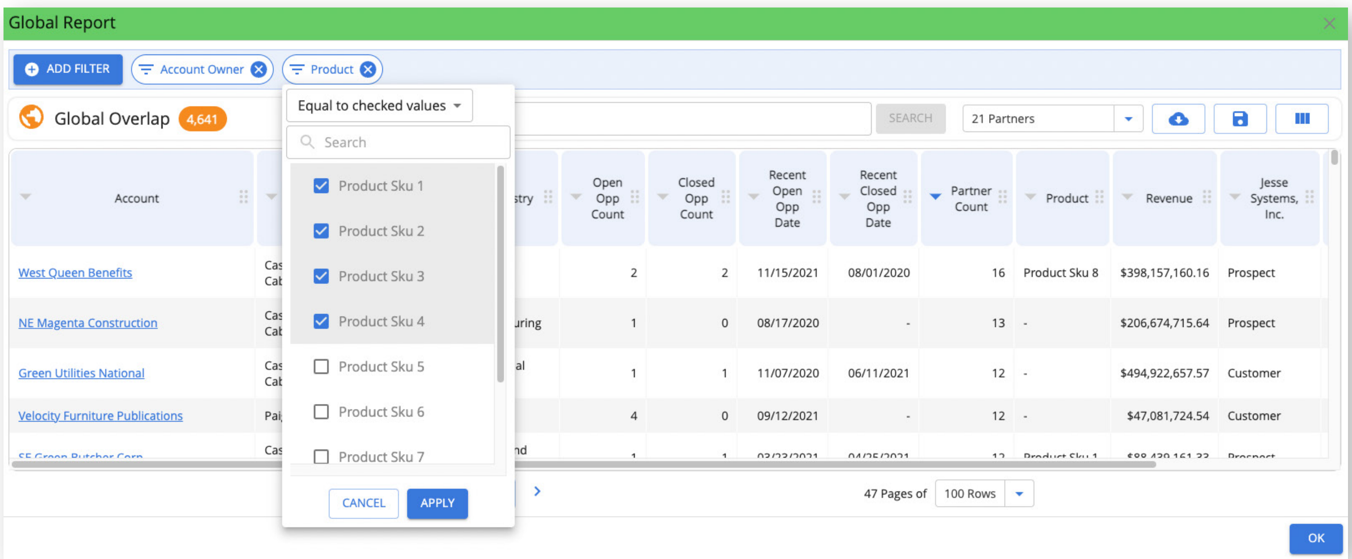
1. **Use the Ecosystem Overlap report** to analyze the installed products, partner relationship status, industries, etc. to identify the best partner to engage your accounts
2. **Export narrowed down list** of target accounts for each partner
3. **Track new opportunities in Salesforce** tied to each partner and tracked to the "PartnerTap Sourced" campaign



Leverage other partners to accelerate deals

Our multi-partner account report is a great way to source new opportunities, by helping you to find the best partner or partners to accelerate existing deals. Maybe you're in a competitive situation, or maybe you've come in to the deal late and need to catch up quickly, partners who have experience and credibility within your account can give you the edge you need to win. With PartnerTap you can tag opportunities where partners have helped you, and then reciprocate when that partner may need you.

1. **Use Ecosystem Overlap reports** to identify complementary partners that can accelerate sales to specific accounts
2. **Track any new opps accelerated** from this effort with the "PartnerTap Accelerated" campaign in Salesforce
3. **Coach partners** on how to connect with each other on PartnerTap

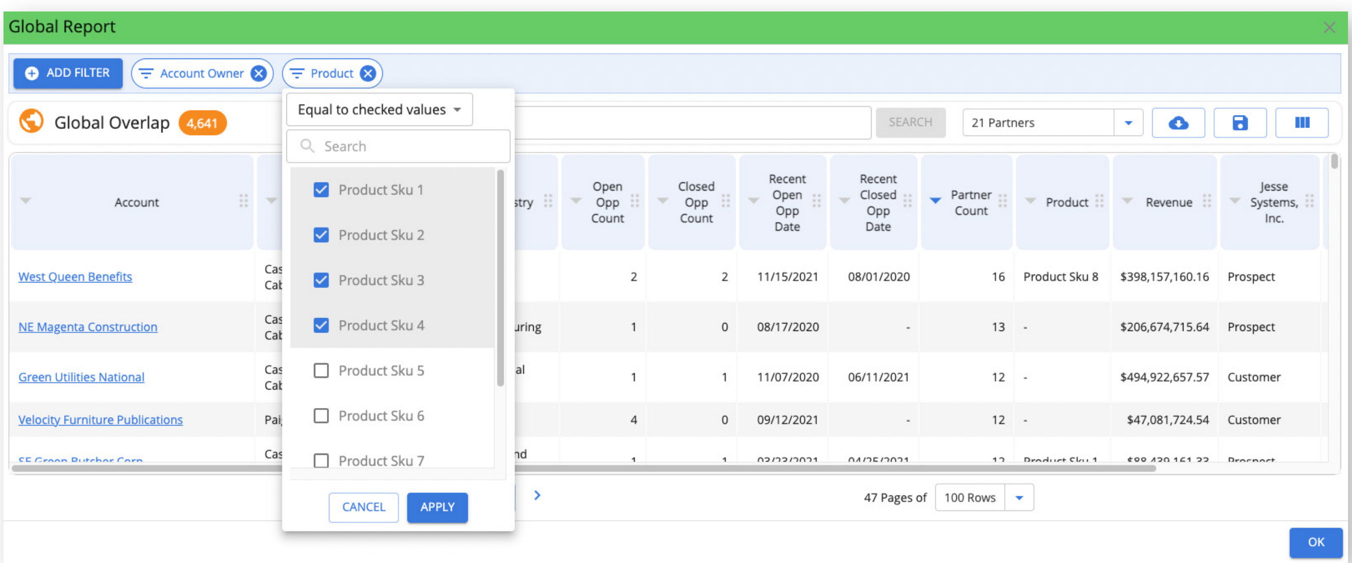


Best Practices for Partner Marketing

Create targeted co-marketing lists

Partner marketing teams regularly run campaigns with partners with the aim of generating more pipeline for each side. Unfortunately, most of the time partner marketing campaign results are not as impressive as once thought because teams aren't utilizing the appropriate data for more targeted campaigns. Using PartnerTap's multi-partner account report, partner marketers can create a very targeted lists of accounts with specific offers or invites to local events. By targeting campaigns at a few number of highly relevant accounts, your partner marketing campaigns will generate stronger results and a higher ROI.

1. **Use Ecosystem Global Overlap reports** to identify specific accounts to co-market to with each partner
2. **Export** account list from PartnerTap
3. **Track any new opps sourced** from this co-marketing list with "PartnerTap Sourced" campaign in Salesforce

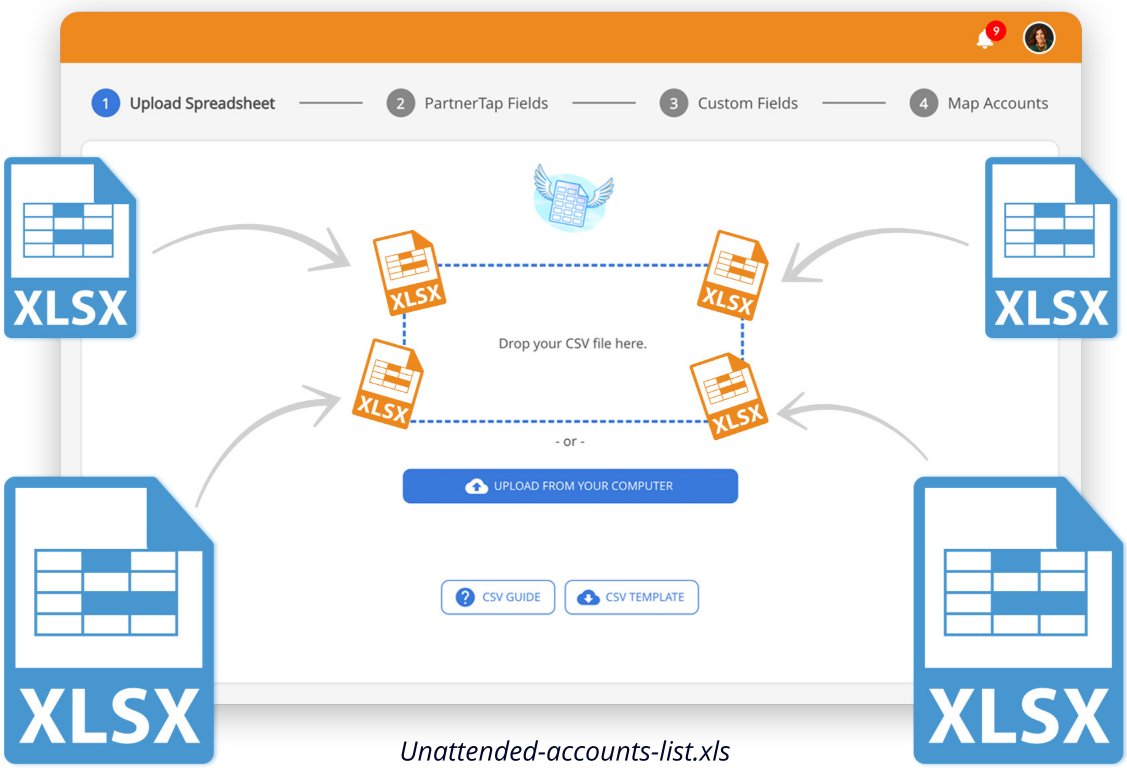


Selling More through Resellers

Match unattended accounts with the best reseller

If you sell through resellers you know that discovering you have unattended accounts is a forehead-slapping moment. If resellers don't know about a certain account - then there's nobody out there selling your products. Unfortunately, it's hard to identify your unattended accounts, and it's even harder to figure out which reseller to assign them to. With PartnerTap you can match unattended accounts with the best reseller in just a few minutes.

1. **Upload your unattended account list** spreadsheet into PartnerTap
2. **Use Ecosystem Overlap report** to see the overlap on this list with all of your other partners. Filter down to identify all the accounts that do NOT have a partner associated with an account
3. **Share the new accounts** with the best reseller for each account and suggest they go sell to them
4. **Track any new opps sourced** from this effort with "PartnerTap Sourced" campaign in Salesforce



Unattended-accounts-list.xls

Upload installed products information

Knowing which products a customer already has, helps sellers identify the next-best product(s) to sell to each customer. With PartnerTap it's easy to build an enriched-view of each account. Simply upload your installed products list for each account into PartnerTap using the spreadsheet upload feature and the installed products information will be available as additional columns in all of your reports.

1. **Upload your installed products data** for each account into PartnerTap (use augment accounts spreadsheet upload). The installed products information will simply become additional columns available for each account in your reports
2. **Host a webinar** to tell your partner executives about PartnerTap and your ability to share installed products with partners once they connect with you
3. **Update Share Settings** to share the new installed products columns with the best partners for your accounts
4. **Track any new opps sourced** by partners from this effort with "PartnerTap Sourced" campaign in Salesforce

Installed products-accounts-list.xls

Share buyer intent insights with your partners

There are a variety of companies out there that provide buyer intent data. If your company has purchased this data it's easy to enrich your account data in PartnerTap with these buyer intents. Simply upload your buyer intent data for each account into PartnerTap using the spreadsheet upload feature and the buyer intent information will be available as additional columns in all of your reports. You can use share settings to share this buyer intent data with the specific partners you want to share it with.

1. **Upload your buyer intent insights** for each account into PartnerTap (use spreadsheet upload). The buyer intent information will simply become additional columns available about each account in your reports
2. **Host a webinar** to tell your partner executives about PartnerTap and your ability to share buyer intent with partners once they connect with you
3. **Update Share Settings** to share the new buyer intent columns with the best partners for your accounts
4. **Track any new opps sourced** by partners from this effort with "PartnerTap Sourced" campaign in Salesforce

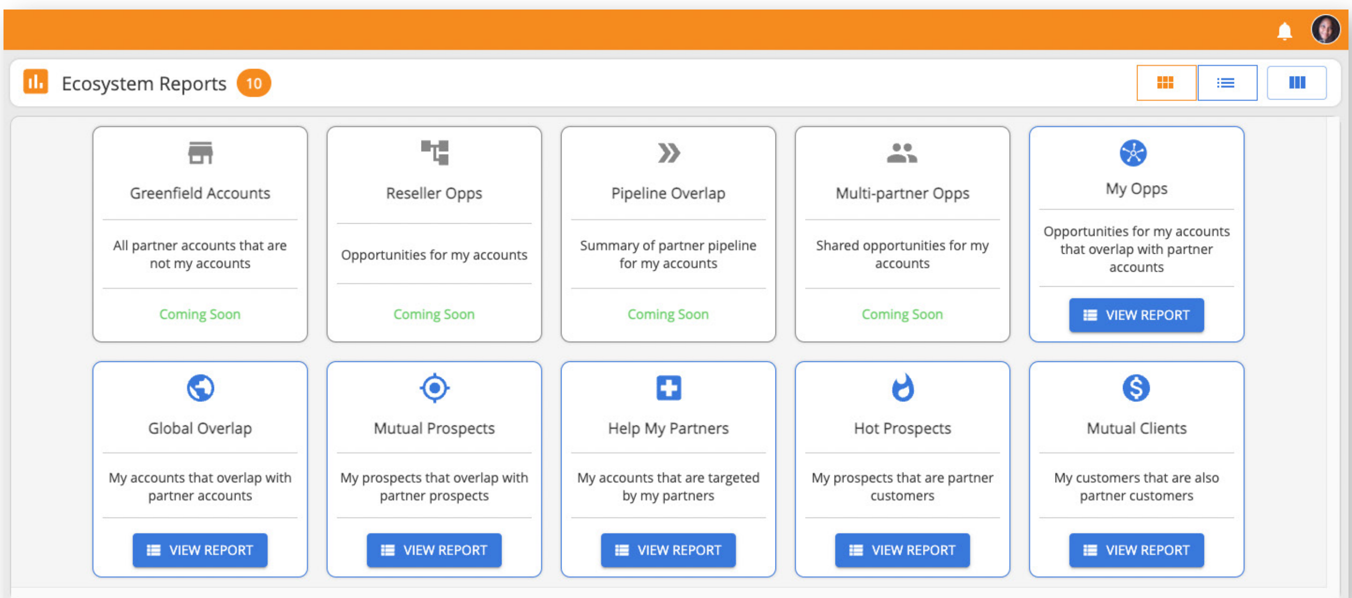
Buyer-intent-accounts-list.xls

Selling More through Marketplaces

Use data to prioritize R&D investment in partner connectors

Knowing which mutual customers you and your partners already have creates the business case for the R&D investment. Prioritizing which partner to spend resources on is easy with PartnerTap. Simply connect with your marketplace partners and share mutual customers. Quickly you'll understand which partners have the greatest opportunity inside your current client base.

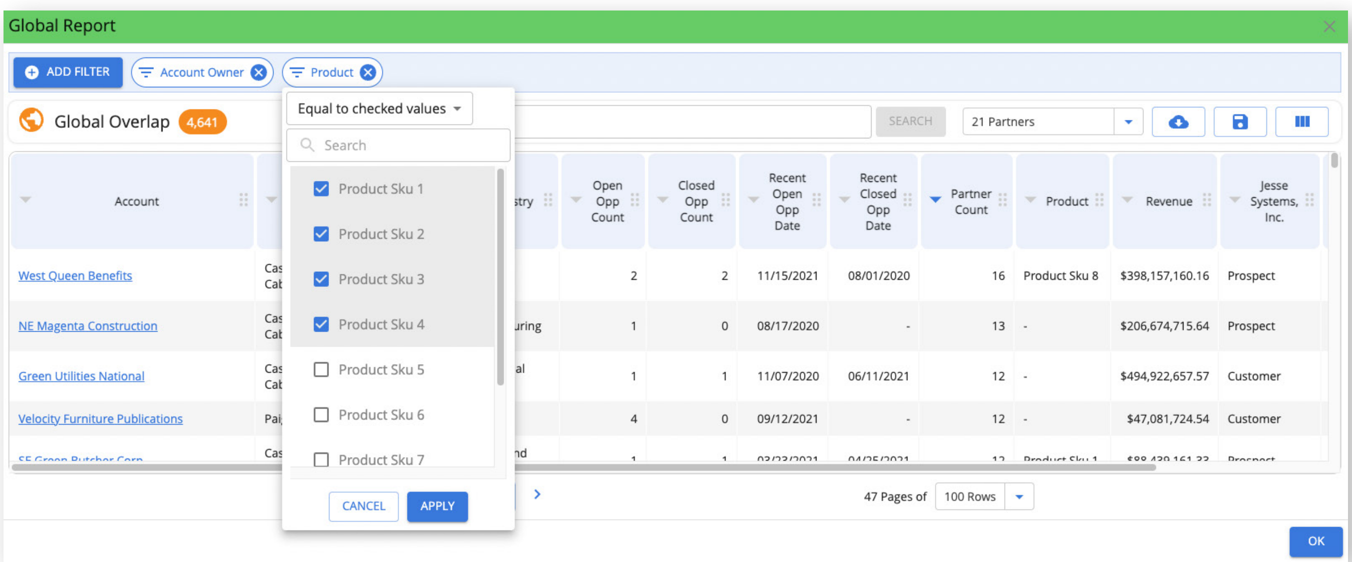
1. **Invite your marketplace partners to connect**
2. **Set share settings to "mutual Customers"**
3. **Run global ecosystem report "mutual customers"**
4. **Understand who has the greatest overlap in mutual customers**



Use data to entice strong-fit companies to invest in solutions for your marketplace

Knowing which mutual customers you and your partners already have helps the partner team create a business case with real data. Connecting with your marketplace partners and sharing mutual customers allows your team to strategically look at the mutual customer overlap. Next, you can informatively let your partner know why the investment makes sense. Reviewing propensity to buy data and NPS score data together in mapped accounts can tell the right story to your partner around investing in your customer ecosystem.

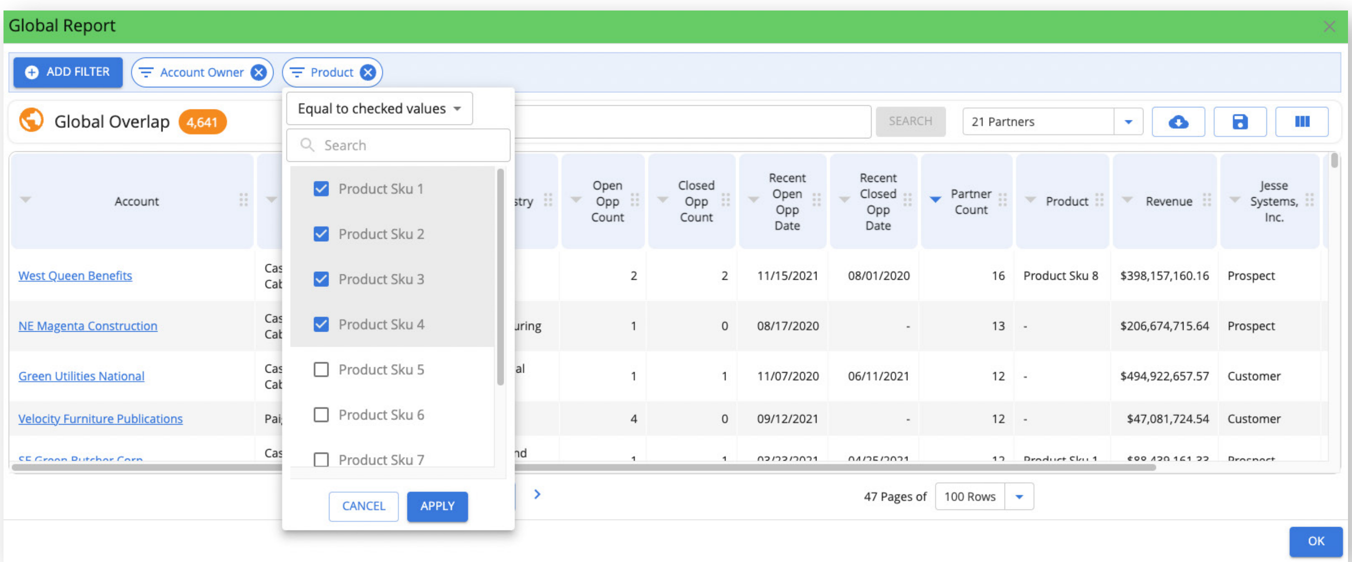
1. **Invite partners to connect**
2. **Share mutual customers**
3. **Review global overlap mutual customers report, select your partner**
4. Filter by propensity to buy and NPS
5. Report on best in class partner to invest in new connectors for your customer base



Create targeted lists for install base campaigns to promote partner solutions

Building integrations with partners is difficult, promoting the integrations to the right partners is the other half of the battle. PartnerTap makes it easy to target marketing promotions to the right customers. Connecting with your marketplace partners and sharing mutual customers allows your team to start by promoting the solution to the right companies. When you are ready to promote the solution to everyone who is a mutual customer, the team can now do this at scale. By syncing PartnerTap mapped data back to your CRM your marketing team can run accounts and a contacts report, add a mutual customer partner company field, and run a mail merge campaign that is tracked through your CRM.

1. **Sync mapped partner data inside CRM**
2. **Run CRM accounts & contacts report, add mapped partner company and partner company account type = customer**
3. **Create a mail merge and send integration marketing campaign**

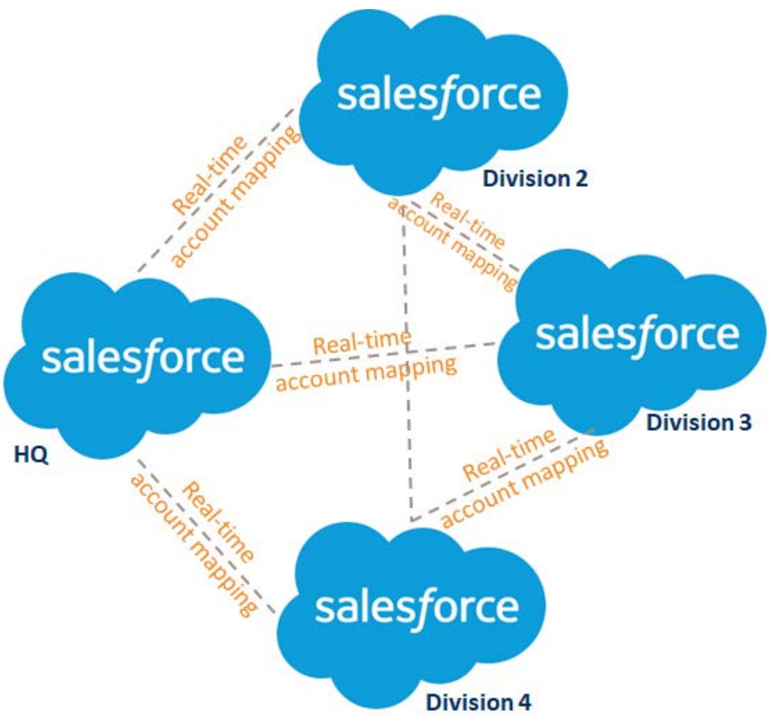


Accelerate Cross-sell Revenue Post-M&A

Account Map across multiple CRM systems

Post M&A system integrations are a high priority, however one of the last systems companies need to integrate is their CRM's. Each company has their own Salesforce, Dynamics, Hubspot, etc instance and all of these CRM's are highly customizable. This makes it a large project to integrate and not lose sales momentum. With PartnerTap companies can continue to operate in separate CRM's while bringing the most important data together to accelerate cross sell and upsell revenue. Simply connect on PartnerTap and share all accounts (everything that maps) and greenfield accounts (everything that doesn't map). This starts the M&A blueprint for revenue acceleration.

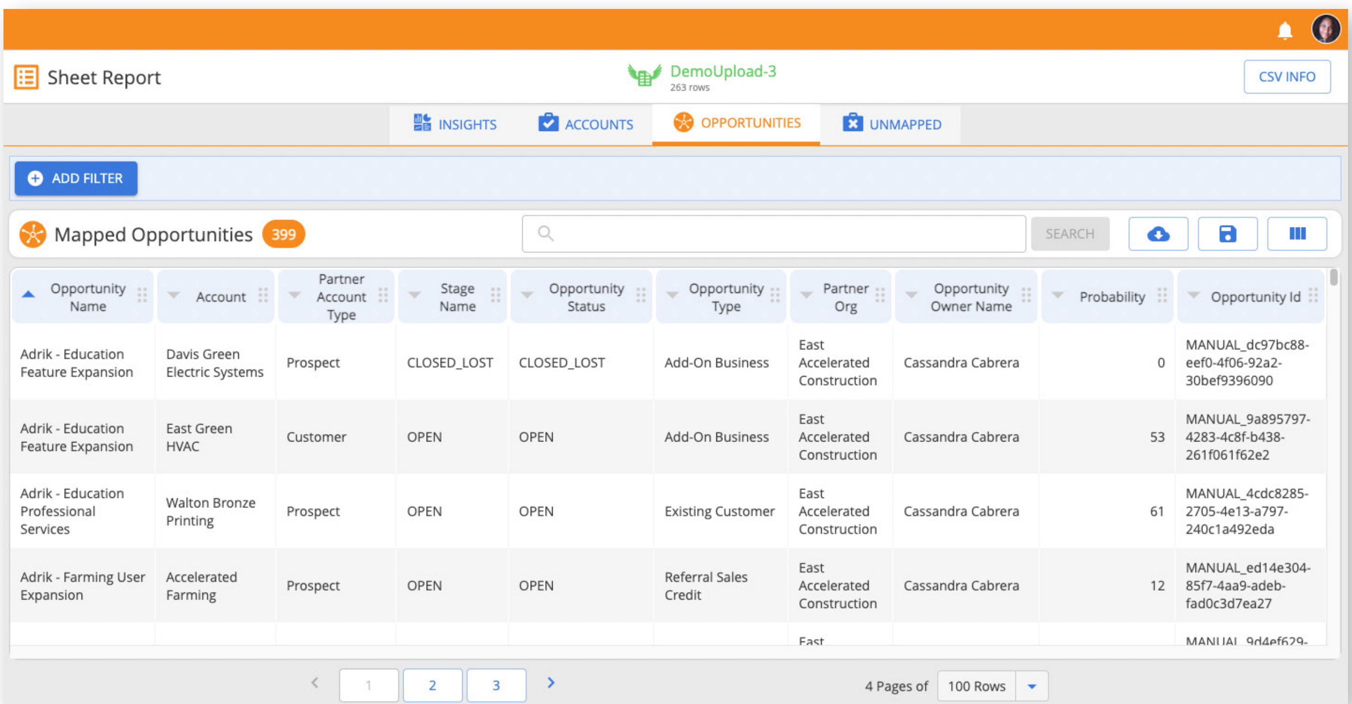
1. Invite your acquisition company to join you on PartnerTap
2. Share "all overlapping accounts" & share "greenfield report"
3. Align field teams around open pipeline to help influence deals and around the best customer accounts to provide introductions



Identify cross-sell opportunities

Driving revenue post acquisition starts with identifying low hanging fruit and helping the sales teams cross-sell and learn to work together. PartnerTap will help your organizations identify accounts your teams are already engaged with and their corresponding customer accounts. Working together by pairing CSM and sales reps can help influence your customers to select your company going forward. Identifying these better together stories can take minutes with PartnerTap reporting and sales team alignment. Reviewing the mapped opportunity data report and filtering by the acquirers mapped customers, can pinpoint which reps you should align immediately to help influence pipeline that your teams are already engaged with.

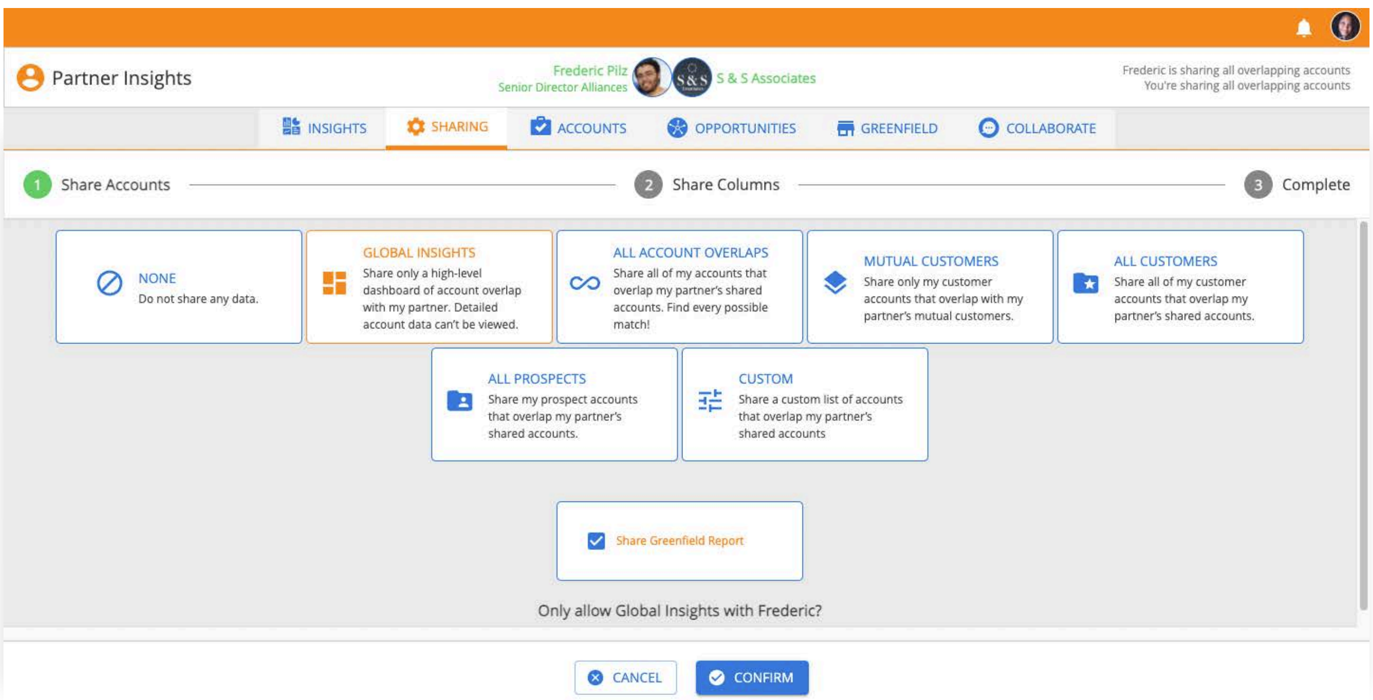
1. **Review mapped Opportunity report**
2. **Filter report by my prospects partners customers**
3. **Run report by CSM and aligned Sales rep**



Identify "greenfield accounts"

Greenfield selling is finding accounts that haven't been touched by your sales and marketing teams because they aren't listed in your CRM system. PartnerTap makes it easy to identify these hidden accounts by enabling a share setting called Greenfield reporting. Simply share all overlapping accounts and greenfield accounts. PartnerTap will provide a Greenfield report for you that shows all accounts that don't map we'll also include important details such as: address, DUNS, VAT, phone number, and website so your teams can easily choose what accounts you would like to add to your CRM and what account teams you want to assign to them.

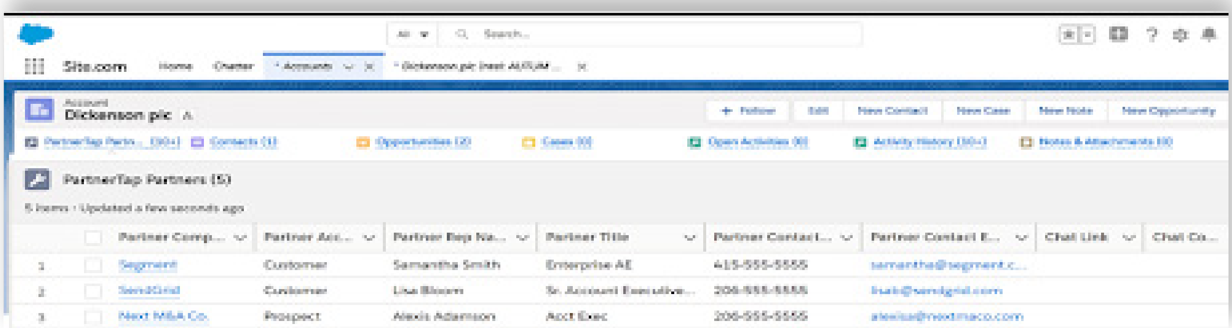
1. set share setting to "greenfield reporting"
2. View the greenfield report & select the accounts you would like to assign
3. Upload the .csv to your CRM



Global sales visibility to account owners (align account owners across CRMs - push data into sfdc)

PartnerTap delivers mapped account data directly to Salesforce, meeting revenue teams where they are, weather it's on a mobile device, online or inside the CRM. By turning on PartnerTap's Salesforce managed package all of the mapped account owners from your acquisitions are inside of your CRM. Sales leaders and account teams can see all of their aligned sales reps on every acquired company. As the data changes in PartnerTap it syncs nightly back to your corresponding CRM systems.

1. **Connect on PartnerTap**
2. **Share all overlapping accounts**
3. **Install the PartnerTap managed package for SFDC**
4. **View mapped PartnerTap data inside Salesforce**



PARTNERTAP

The leading enterprise partner ecosystem platform

- **Products for both channel and sales teams**
- **Automates partner account mapping** while giving each company full control over what data they share with each partner
- **Identifies new pipeline opportunities** and ways to accelerate deals with partners
- **ROI** typically realized during 1-2 month pilot

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Glossary of Terms

Account Matching
the process of finding the same account information between two partners

All Accounts
a list of all your accounts that have been uploaded to PartnerTap

All Opportunities
a list of all the opportunities you have within PartnerTap

All Partners
a list of all your connected partners within PartnerTap

Account Sheets
a list of all your uploaded spreadsheets with your accounts

Audit Report
a report that has been audited by the PartnerTap auditing team to check for accuracy

Audit Team
the team within ParterTap that specializes in checking account information and matched data for accuracy

Collaborate
working with your connected partners using the in-app direct chat function

Connected Partners
all of your partners that have connected with you and are working with you on PartnerTap

CRM
Customer Relationship Management system

Default Share Settings
when you invite a partner to join PartnerTap the default share setting is Global insights. This helps both sides understand the high-level account overlap prior to setting up custom share settings.

Ecosystem Dashboards
dynamic charts that show specific accounts where you can drive more revenue with partners

Ecosystem Dashboard (Salesforce Integration)
a Salesforce integration view within the Ecosystem Dashboard the Prospect Open Pipeline Overlap shows your prospects with at least 1 open opp and your partner's customers. The Customer Open Pipeline Overlap report shows your customers with at least 1 open opp of your partner's prospects

Ecosystem Global Overlap
a chart of matched accounts grouped by account type (prospects/customers)

Ecosystem Reports
a list of reports available base on account type (Mutual Clients, Hot Prospects, Help My Partners, Mutual Prospects, Global Overlap)

Filtering on Target Accounts
accounts that have already been loaded into PartnerTap and that can be filtered by adding a unique identifier so that you can easily find them using filters in the ecosystem reports

Glossary of Terms

Global Reports
a list of all overlap with all of your partners. This shows you mutual customers, mutual prospects, your prospects, your clients and your partners clients and customers

Help My Partners
a report showing your customers that are prospects of your partner's

Hiding/Unhiding Columns
the ability to hide columns on any of your reports in PartnerTap that you don't want to see

Hot Prospects
a report showing your prospects that are current customers of theirs

Integrations
different CRMs that are able to direct connect with PartnerTap

Invite Partners
sending a message to your partners to begin sharing account information with you either directly through PartnerTap or using a personal invite link

Leads
accounts that are in the top of your sales funnel and have yet to convert to an opportunity or moved in to a sales motion

Login with Salesforce
the process of directly connecting your Salesforce CRM to PartnerTap

Login with Hubspot
the process of directly connecting your Hubspot CRM to PartnerTap

Manually Uploading Accounts
using spreadsheets to upload account information into Partnertap

Manually Uploading Leads
uploading a spreadsheet of leads to PartnerTap

Manually Uploading Opportunities
uploading a spreadsheet of opportunities to PartnerTap

Manually Uploading Partner Spreadsheets
using spreadsheets to upload your partner's account information as opposed to directly connecting your CRM

Mapped Accounts
a report showing all of overlap in account information between you and your partners

Multi-Partner Reports
PartnerTap takes all of the partner spreadsheets that have been uploaded by your team members, all of your connected partners, and the data that has been transferred across all of your team members and their partners and catalogs all that data into ecosystem reports. This is multi-partner reporting.

Mutual Clients
a report showing all your clients that are also clients of your partners'

Glossary of Terms
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Mutual Prospects
a report showing all of your prospects that are also prospects of your partner's

My Accounts
all of your account information that has been uploaded to PartnerTap

My Opportunities
all of your opportunities that have been uploaded or sourced in PartnerTap

Opportunities
leads that have been converted to open opps

Partner Sheets
spreadsheets that have been sent to you by your partners and uploaded into PartnerTap

Recent Accounts
accounts that have been recently viewed by you listed in order from most recent to least

Reporting
a list of different reports in PartnerTap

Request an Audit
You can request an audit after you have uploaded your partner sheets. PartnerTap's account matching audit service leverages our team of global auditors to find every last matched account shared by you and your partners. Our account data auditors will go through every row of unmatched data and find every partner account that should be matched with your data.

Salesforce Managed Package
The PartnerTap Salesforce Managed Package offering allows all the rich mapped partner data that you have within PartnerTap, with all of your partners, customers and prospects to be pulled RIGHT into Salesforce.

Saved Reports
a list of all the reports you have customized and saved within PartnerTap

Search Results
a list of mapped accounts that you have recently searched for

Share Custom Fields
When you have recently connected with a partner, you will need to choose what you would like to share with that partner. There are multiple sharing options available including sharing custom fields.

Share Settings
share settings allow you to control the datasets that you share on a partner-by-partner basis

Syncing your CRM
the process of adding new information from your CRM into PartnerTap and looking for any new account matches. This is done automatically by the PartnerTap every week by default. (This is only possible if you have direct connected your CRM to PartnerTap)

Upload Accounts
if you haven't directly connected your CRM to PartnerTap you can upload account information using spreadsheets