REVENUE ACCELERATING PARTNERSHIP USE CASES

18 Ways to Unlock Billions in New Pipeline with Partners

PARTNERTAP

The Channel Challenge

Driving more revenue with and through partners

All enterprise businesses rely on partners. Some sell their products through resellers or actively co-sell with strategic partners, others increase win rates and stickiness with technology partners, while others have thousands of marketplace partners. However the most successful enterprise leaders have all four types of partnerships actively contributing to their growth.

Yet with all the investment and revenue coming in from the channel, companies struggle to dramatically scale-up channel revenue because they lack the right tools and actionable data. For years channel and sales teams have shared account lists with partners hoping to find deals they can work together on. Excel spreadsheets fly back and forth, channel managers scan through long lists, find one or two accounts, introduce the reps on each side, and toss the list to the side. This manual process is tedious, inefficient, and misses out on billions of dollars of potential pipeline.

Modern sellers need actionable partner data

Companies that can unlock the right data have a multi-billion-dollar pipeline opportunity by empowering both channel sellers and direct sales teams to sell more with partners. But it is hard to operationalize channel growth strategies and empower sellers to sell more without the right data and tools. Most companies today have a CRM system, a PRM system, LinkedIn Sales Navigator, and another thirty-plus sales apps for everything from territory alignment, buying propensity, and sales training through quoting and commissions tools.

Channel teams have a similar problem. It's 2022 and there have been woefully few innovations in partner sales technology. PRM systems track partner certifications, share marketing collateral, manage the deal registration process and sometimes track commissions. But a PRM can't uncover new deals, connect sellers, or accelerate deals. So, sales and channel teams still email around lists of accounts, leads lists, lists of installed products, and lists of active pipeline opportunities. These are scanned over by sales reps then set aside. These set-aside lists contain hundreds, even thousands, of additional accounts that could be a product opportunity for another seller. And resellers? Resellers must send over lists of their active pipeline and then carefully compare each deal against their CRM and spreadsheets to ensure they get paid on each deal.

The Channel Holy Grail

Automatic account matching with partners

This white paper dives into the eighteen best practices to drive more revenue with partners. It includes examples of how companies like HPE, ADP, SAP Concur, DXC, and Lightspeed use PartnerTap to drive more revenue through and with their channel partners. It walks through specific use cases and best practices to accelerate growth.

Technology Partnerships

Increase win rates and make customers stickier with the best-fit ISV and services partners for each account

Resellers

Use data-driven insights and collaboration with product specialists to sell more through your channel sellers

Marketplace Partners

Use mutual customer overlap data to prioritize marketplace investments and partner promotions

Co-Selling Partners

Enable your co-sell partners to work directly with your sales reps on their mutual accounts to drive more sales together.

Co-Marketing Partners

Drive higher conversion rates and sales with hyper-targeted account lists for each campaign.

Referral Partners

Increase referrals into the best accounts with the highest propensity to buy. Drive increased sales together.

PRO-TIP #1: Use MDF to fund your partner sales platform

After you read the following six best practices for uncovering more pipeline and accelerating growth with your partners, we'd like to show you what we can do. We'll help you plan the best rollout strategy for your teams and your partners. You may be asking, how can you get the budget as fast as you need it?

Enterprise leaders have allocated MDF budgets to buy PartnerTap with great results. Investing in PartnerTap drives more revenue than any other marketing event or program. Using PartnerTap, you can generate pipeline, close more business, and get the actionable data you need to go get even more MDF from your strategic partners. After all, wouldn't Intel, Microsoft, AWS, or Cisco be happy to invest more MDF in your business if you could prove it generates 10x the ROI for their business?

Specific use cases and best practices covered in this whitepaper

1. See partner center of influence in each region, segment, and industry
2. Get a holistic view of all your data for each account (in one row)
3. Get a multi-partner view of each account
4. Co-sell with the strongest partner(s) on each account
5. Leverage partners to swap out competitors
6. Targeted co-marketing with partner data
7. Create partner-specific lists for co-marketing
8. Map your prospects, unassigned and unpenetrated accounts
9. Connect resellers with your product sales specialists
10. Automate pipeline and opportunity sharing
11. Identify net-new greenfield accounts
12. Identify your mutual customer overlap with marketplace partners
13. Make data-driven MDF investments
14. Use data to get more MDF
15. Use partner data to guide product investments
16. Build a competitive intelligence moat
17. Automate account mapping in multi-org CRM environments
18. Accelerate revenue post-M&A

Technology Partnerships

Empower your sales reps to leverage the best partners for each account

Successful technology companies typically have a large ecosystem of ISV, System integrators, and Global Systems integrators, each extending your products, filling a product hole, or providing a complementary service. The key to driving more revenue with technology partners is knowing where your teams should focus together.

See partner influence in each region, segment and industry

Different partners can help you in different ways. Some are helpful in the SMB market while others are experts in the enterprise space. Some partners have deep healthcare, financial services or other industry-specific expertise that could help you win or expand in those accounts while others are well established in certain regions over others.

The first step toward driving more revenue with your technology partners is to quickly map and understand each partner's existing customer base and strengths. When you invite a partner to connect with you on PartnerTap, you can get a market overlap dashboard as soon as they accept your invitation.

This connected partner dashboard shows you:

- **Segment overlap:** where each partner has existing customer relationships broken down by your segment. For example: small business, mid-market, enterprise, global accounts.
- **Industry overlap:** how many mutual accounts you have in each industry. Once again, this shows you the overlap using your company's industries so you can easily assess the industry-fit for each partner.
- **Regional overlap:** how many customers each partner has in each geographic area. Every company has different territories, so this dashboard shows you the partner's regional breakdown using your company's territories.

Get a holistic view of all your data for each account

The next important step to operationalize your growth strategy is to bring together ALL the different information you have about each account into one centralized record. With PartnerTap you can map accounts with partners and get a multi-partner view of each account. You can use this same technology to map each account with your propensity to buy information, NPS or CSAT data, installed products, life-time value, recent closed-won deals, and any other insights you have into each account. PartnerTap consolidates all of this information into a single view of each account and provides reports that make it easy to slice and dice your accounts based on any of these criteria.

Get a multi-partner view of each account

Now that you have a holistic view of all your enterprise data for each account, the next step is to develop your partner ecosystem view of each account. Uploading all of your partner spreadsheets and inviting partners to connect directly on PartnerTap will build up your multi-partner view of each account and let you see which partners already have strong customer relationships and expertise.

This holistic view of your accounts makes it possible (and daresay… easy) to pinpoint the best places to have partners spend time on introductions, co-marketing, and co-selling with your team.

BONUS: real-time opportunity sharing

As your partners get comfortable using PartnerTap they can also share opportunities which gives you a real-time view of which partners are actively selling into each account, what products have been sold recently, and how much business each partner is doing within your customer base.

Targeted co-marketing with partner data

Oftentimes larger partners will provide market development funds for in-person events and targeted marketing campaigns. Detailed mapped account data can accelerate MDF approvals and justify even more market development funds.

There are lots of ways that partner marketing teams can help generate new pipeline and accelerate current deals. Unfortunately, most partner marketing teams struggle to develop targeted lists for each co-marketing campaign because they lack up-to-date target accounts for each partner. With PartnerTap, partner marketing teams can create hyper-targeted lists of accounts to target with each partner, and make sure that the right account owners are brought into the loop.

DXC Technology uses PartnerTap to align sellers and justify more MDF from Microsoft

DXC Technology has been a long time Microsoft Gold partner. By uploading all the Microsoft spreadsheets into PartnerTap, DXC Technology was able to align their teams with Microsoft across key industries and subindustries and justify more MDF from Microsoft. DXC's partner marketing team was able to build a solid business case for an in-person event with Microsoft. They found their joint customers and key prospects in the retail industry, and were provided more MDF funds than originally requested because their business case was aligned with Microsoft's key industry focus. DXC is a PartnerTap success story. In less than 30 days they drove millions in new pipeline that never would have been uncovered without PartnerTap.

Identify net-new greenfield accounts

No matter how big your CRM database is, there are always companies out there that you don't know about. With PartnerTap, your technology partners can share their "Greenfield Accounts" with you. Greenfield accounts are active companies that exist in their CRM database that are not yet in your CRM system. Identifying new accounts gives your sales teams more companies to go after.

Co-sell with the strongest partners on each account

Connecting sales reps to their peers at each partner is the "last partnership mile" that can drive exponential revenue for both sides. It requires an intentional investment in a solution like PartnerTap to enable sales reps with the right data, technology, and partnering best practices to connect directly and collaborate with sales reps at each strategic partner.

Right data

Sales reps need to see which strategic partners have existing relationships at each of their accounts and exactly who at each partner owns each account. This data must be up to date or else account executives will be constantly reaching out to the wrong sales reps.

Right access

Sales reps need a way to connect and chat with their peers across partners so they can start to build the trusted personal relationships they need to co-sell together. Corporate emails work well for official communications, but are not an effective way for sales reps to build rapport with other reps. Sales teams need a more casual text-based chat platform to communicate with other partner sales reps.

Right insights

Sales managers want to make sure that all chat-based communications are saved into their CRMs so that future account owners get the full history on each account and can benefit on day one from historical partner insights.

Right technology

A one-off solution with each partner won't scale and will make it harder for account executives to be effective. Enterprises need an approach and technology solution that will scale across multiple strategic partners while giving sales reps control over who they want to engage with.

Resellers

Empower resellers to win more with best-fit accounts and real-time access to each account owner and product sales specialist

Your resellers are selling products from your company and your competitors. Enterprises must manage multiple reseller partnerships, reduce channel conflict, and keep each reseller happy. And the best way to make every reseller happy? Help each reseller sell more and make more money.

Map your prospects, unassigned and unpenetrated accounts

Mapping accounts with reseller partners is a great way to figure out where each reseller can sell additional products or services. When you're running channel at a large enterprise company it is very hard to get partners to focus on the right markets, segments, and accounts where they can most effectively win and sell more of your products. The first step is to align each reseller's customers against your prospects, unassigned, and unpenetrated accounts. From there you can find the best partner for each potential customer, and then share the accounts with the reseller most likely to win the new business for your products.

Connect resellers with your product sales specialists

Now that you know which resellers have the best relationship with each prospect, the next step is to make sure that reseller is empowered to win the sale for your products. To do this it's critical that they have direct access to the correct product sales specialist and channel sales support people on each account.

The problem is, companies are so big, and employees move around so much, that it is nearly impossible for resellers to know exactly who to call for true sales support on each account. People change roles, new people come into the company, and territories change. Sending around lists of accounts and account owners via spreadsheet isn't scalable and forces your resellers to work off out-ofdate information. So, in addition to mapping and sharing specific lists of accounts with each reseller, it is also critical to let them see your up-to-date account teams including account owners, product sales specialists and customer success reps so they can reach the right person as they work each deal.

The only way to do this is to connect a Partner Sales Platform like PartnerTap directly with your CRM and invite your resellers to connect and see your real-time account teams on each account.

Automate pipeline sharing and track reseller opportunity progress

The final step in the reseller revenue journey is to share the list of opportunities and products they're selling and then track the progress of these opportunities automatically. This is historically a very tedious and error-prone process that requires a lot of cross-checking and back-and-forth confirmations between each reseller and each channel manager. With PartnerTap your resellers can simply share their opportunities and then you can use PartnerTap reports to monitor the progress of those opportunities without requiring the reseller to send you updates. You get better data and resellers get less busy work.

Identify net-new greenfield accounts

As we stated earlier, Greenfield accounts are customers that exist in their CRM database that are not yet in your CRM system. Identifying these net-new active accounts gives your channel teams more companies to enable the reseller to go after.

Measure new reseller revenue driven through PartnerTap

After you use PartnerTap for all your account mapping and assign the best reseller to each of your prospects, unattended and unassigned accounts, it's important to quantify and track the new revenue sourced through these efforts.

PartnerTap makes it easy to track and measure the new opportunities that are created on these accounts by each reseller.

Measure new partnership-sourced pipeline in PartnerTap:

- Use ecosystem opportunity reports to identify all opportunities created by your resellers or your internal teams on your target accounts since the date you shared these accounts with each reseller
- Include the # of chat conversations, first and last mapped date, and specific partner attribution to bolster data proving this opportunity was sourced through these partnership activities

Most customers can prove a positive ROI within the first 30 days using PartnerTap.

Lightedge empowers resellers to sell more with mapped data and relationship-informed lead routing

Lightedge sells through a network of reseller partners who are supported by Lightedge product sales specialists. Using PartnerTap, Lightedge has empowered their resellers to sell more Lightedge products and now routes new leads to the reseller that already has an existing relationship with that customer. Here's how it worked:

1. Lightedge resellers shared their list of customer and prospect accounts with Lightedge.
2. These accounts were mapped against all Lightedge accounts.
3. Resellers could see which companies already had Lightedge products installed, and compare this with the other technology products they have sold to each company over the years.
4. Each reseller could easily identify which customers to target for Lightedge products, driving more revenue than they could have otherwise
5. Lightedge continues to do their own marketing. As leads come in to Lightedge they can now assign each lead to the reseller partner that already has an existing customer relationship, accelerating sales cycles and increasing win rates for a measurable impact on revenue.

Marketplace Partners

Instantly identify all mutual customers with each marketplace partner

Over the past ten years enterprises have invested and built up an ecosystem of technology partners that get promoted to their customers via an online marketplace. There's the Salesforce AppExchange, the Microsoft AppSource or Azure Marketplace, the ADP Marketplace, and hundreds of other marketplaces for other technology companies.

Building and scaling these marketplace ecosystems is a major undertaking. Companies make these investments for four reasons:

1. To expand their product footprints and company influence in their market
2. To lock-in customers with more product integrations
3. To build a moat around their business with a network of partners invested in their company success
4. To accelerate growth with an ecosystem of marketplace partners

Now that you have your marketplace, how can you leverage these partners to unlock exponential growth?

PartnerTap gives you three powerful ways to accelerate growth using actionable data from each of your marketplace partners.

Identify your mutual customer overlap with each partner

The first step to driving revenue with marketplace partners is to quickly identify ALL your mutual customer overlap. Many companies have a multi-product portfolio and oftentimes each product requires a separate integration. By understanding the mutual customer overlap teams can drive new comarketing initiatives.

Today most companies must wait until a customer downloads or uses a partner connector to know who their joint customers are with a particular partner. What if you could instantly identify all your mutual customers with each marketplace partner? Imagine the targeted campaigns you could run to promote a particular marketplace connector or complementary solution. Imagine the potential to get customers to upgrade so they could use more integrated partner solutions then using this data to forecast customer retention and growth.

PartnerTap makes it easy to instantly identify your mutual customers with each marketplace partner. The steps to do so are:

1. Connect PartnerTap to your CRM (takes 2 minutes)
2. Upload any customers list spreadsheets partners have already sent you
3. Invite marketplace partners to connect with you directly on PartnerTap
4. Agree to share mutual customer accounts with each other within the Share Settings feature
5. Instantly see your list of mutual customers
6. Export these accounts for targeted campaigns

As soon as you know all of your mutual customers you can run targeted email campaigns to encourage those joint customers to download, install, or use the partner's connector. This will increase downloads, make customers stickier, and strengthen your relationship with these partners.

Leverage partners to swap out competitors

Your partners have made an investment to build an integration and promote themselves on your marketplace. They have a joint value proposition for your customers and a vested interested in your business success.

As you build win-win relationships with each partner, they are more and more likely to share more information about ALL their current customers, including those that use your competitors' products. PartnerTap makes it easy for partners to control what information they share with you. While they may start off sharing only mutual customer accounts, they could easily expand what they share to include all customers, or all customers using a specific competitor product.

Once you have a list of companies that use your competitor's product and your marketplace partner's product you can design a competitive sales play to go after those accounts. Here's how companies plan and run these plays with PartnerTap:

1. Create target list of partner customers that use your competitor products
2. Include the partner's sales account owner and your account owner on each account (this comes out of the box with PartnerTap)
3. Design your product-specific competitive swap out sales play, emphasizing the value of the partner's integration and support for your company's product
4. Introduce the sales reps on each side*
5. Have the partner account owner introduce your sales rep into each company's decision makers
6. Leverage the partner account owner for insights and support throughout your sales cycle

* *The typical process for connecting reps is to introduce them one-by-one via email. You're free to do this, but we suggest a better way. With PartnerTap you can connect sellers on their shared accounts within our product and let them chat directly with each other when they need help. These chat conversations are saved automatically into both company CRM systems. These chats can also be pushed into Slack via the PartnerTap Channel.*

Use data to guide product investments

Marketplace teams often need to build a business case to get their product teams to focus R&D resources on new integrations with partners. Mapping mutual customers is the first step of this business case. PartnerTap can give you all the firmographic data you need about your mutual customers to justify an investment by R&D in these new integrations, specifically:

- Segments: are our mutual customers in the enterprise, mid-market or small business sectors?
- Industries: could this new partner connector help us sell more into specific industries?
- Regions: could this new partner connector grow faster within a particular region?
- New business: could this new integration help us win more net-new business into this partner's other customers?
- Expansion revenue: would this integration help us upsell existing customers to higher editions?

PartnerTap allows companies to share mutual customers along with installed products (if applicable). The Marketplace partners can build their own co-marketing campaigns and market their partner integrations to the right customers. Each integration that is turned on with your customers increases the stickiness and LTV. The data can also be used to build stronger business cases to focus R&D dollars on the right integrations with the right Marketplace partners.

Use data to guide MDF investments in partners

Do you invest MDF in your marketplace partners? If yes, how do you decide how much to invest in each partner? Sometimes the shiniest and loudest partners get a greater share of MDF because companies simply don't have the hard data they need to identify the partners that could actually generate the highest returns. With PartnerTap, companies get the actionable data they need about each partner to prioritize MDF investments AND measure the pipeline generated through each company's partnership activity.

Use PartnerTap to prioritize MDF:

1. Ask partners to share customer accounts with you so that you can understand their sphere of influence and proven strengths by segment, industry and region
2. Ask partners to share prospect accounts with you so that you can identify a list of good-fit mutual prospects to target with the MDF
3. Prioritize MDF investments in companies with a proven track record winning specific types of accounts
4. Inform your prospect account owners of the partner's upcoming campaigns into these accounts so they are prepared
5. Enable your sellers to chat and collaborate with each other about each mutual account within PartnerTap or Slack

Use PartnerTap to measure pipeline sourced and accelerated with partners:

1. Use PartnerTap opportunity reports to identify all the new opportunities created by the partner on these target prospect accounts after you account mapping and MDF investment

2. Use PartnerTap reports to identify the new and accelerated opportunities within your CRM system. These can include:

    a. All new opportunities your sales team created on these accounts

    b. All existing opportunities that progressed stages and have sales chat conversations happening in PartnerTap or Slack

Build a competitive intelligence moat

With PartnerTap it's easy for partners to expand the details they share with you on each account. While the default account information shared is just company name, account owner, industry, and account status, a partner could choose to share any or all additional fields they have for each company. Imagine the competitive insight you could quickly accumulate from all your marketplace partners if they shared these additional fields.

PartnerTap's ecosystem reports give you a multi-partner view of your accounts that can include:

- The partner account status (customer, prospects, greenfield)
- Partner sphere of influence on each account as well as by , industry and region
- Installed products from each company
- Overlap view of opportunities shows you all of the changes to accounts and opportunities across your ecosystem

These reports let you see all your partner info on each account as columns or rows for full slicing-and-dicing flexibility.

Co-selling Partners

Let sales reps connect directly with partner sellers on each account

Co-selling partnerships are complex because you are working with your partners to sell together.

Leveraging the right partner can help you upsell existing customers, cross sell your products to new departments and buyers, and/or get in the door to a new prospect with a strong referral. In co-sell relationships, you are typically aligning accounts and mapping together large field teams. This dance of account mapping and field introductions seems easy but is usually done in spreadsheets and is immediately outdated due to high turnover and account ownership changes that happen every day on most field teams. By the time you've identified the accounts and aligned account teams, some accounts have already changed hands.

Connecting sales reps to their peers at each partner can drive exponential revenue for both companies. While orchestrating and managing co-sell partnerships is a major undertaking, they can pay off in great dividends once the teams start working together. Understanding the market overlap, buying propensity, and each partners' true influence around accounts will allow your teams to focus only on the accounts that have the highest probability of closing. Successful co-selling requires real-time access to the correct account owners on all sides. It also requires strong data controls as each side builds up trust. PartnerTap's Partner Sales Platform sets partnerships up for coselling success with the right data, technology, and built-in partnering best practices to help sellers collaborate and sell more together.

Right data: sales reps need to see which strategic partners have existing relationships at each of their accounts and exactly who at each partner owns each account. This data must be up to date or else account executives will be constantly reaching out to the wrong sales reps.

Right access: sales reps need a way to connect and chat with their peers across partners so they can start to build the trusted personal relationships they need to co-sell together. Corporate emails work well for official communications, but are not an effective way for sales reps to build rapport with other reps. Sales teams need a more casual text-based chat platform to communicate with other partner sales reps.

Right insights: sales managers want to make sure that all chat-based communications are saved into their CRMs to that future account owners get the full history on each account and can benefit from the partner insights.

Right technology: A one-off solution with each partner won't scale and will make it harder for account executives to be effective. Enterprises need an approach and technology solution that will scale across multiple strategic partners while giving sales reps control over who they want to engage with.

Identify strong target accounts for co-selling

Set your co-selling reps up for success by pre-identifying a list of target accounts where they have the highest propensity to win if they work together.

Use PartnerTap to create target co-selling account list:

1. Share both customer and prospect accounts from both sides
2. Understand each company's strengths and center of influence within specific segments, industries, and regions
3. Bring in all additional account insights and share these details with your partner. Additional insights may include propensity to buy, lists of known competitive products installed, and anything else either side already knows about an account
4. Use ecosystem reports to see the combined view of each account

Once you have a target list of mutual prospects you can design a targeted sales play that combines the strengths of both of your solutions and let your sellers go after the accounts together.

Connect sellers with partner seller(s) on each account

It's impossible to co-sell if you can't reach the right partner seller on your account. Account Executives get frustrated when they reach out to a sales rep only to find that person no longer owns that account.

PartnerTap ensures that sellers always have real-time access to the current owner and sales team members on each account. Our real-time account mapping can handle the most complex account team structures, and gives both sides real-time visibility to the account team at all times.

Use PartnerTap to make co-selling conversations instant and easy:

1. Instantly connect all sellers on their joint accounts so they can easily coordinate and share insights via PartnerTap chat or within Slack
2. Push all partner and partner sales owners back into your CRM system using the PartnerTap Managed Package
3. Monitor and measure all conversations between sales teams with partner collaboration reports
4. Let sellers share open opportunities with their counterparts on specific accounts
5. Enrich your insights on each account by saving all chats back into both company CRM systems automatically

Measure pipeline and revenue driven by co-selling

After you use PartnerTap for all your account mapping and connect your sellers with your co-sell partners, it's important to quantify and track the new revenue sourced through your co-selling program. PartnerTap makes it easy to track and measure the new opportunities that are created through your co-selling efforts.

Measure new partner-sourced pipeline in PartnerTap:

- Use ecosystem opportunity reports to identify all opportunities created by your sellers or your co-sell partners on your target accounts since the date your co-selling program started
- Include the # of chat conversations, first and last mapped date, and specific partner attribution to bolster data proving this opportunity was sourced through these partnership activities
- Most customers can prove a positive ROI within the first 30 days using PartnerTap.

Co-marketing Partners

Generate more pipeline with more targeted account lists

Partner marketing teams regularly run campaigns with partners with the aim of generating more pipeline for each side. But oftentimes, partner marketing campaign results are weaker than expected because they don't have the data needed for more targeted efforts. Using PartnerTap's multi-partner account reports, partner marketers can create very targeted lists of accounts to target with specific offers or invites to local events. By targeting campaigns at a fewer number of highly relevant accounts, partner marketing can invest more in the campaign and generate stronger results.

Create partner-specific lists for co-marketing campaigns

There are lots of ways that partner marketing teams can generate new pipeline and accelerate current deals. But most partner marketing teams lack up-to-date target accounts for each partner. With PartnerTap, partner marketing teams can create hypertargeted lists of accounts to target with each partner, and make sure that the right account owners are brought into the loop.

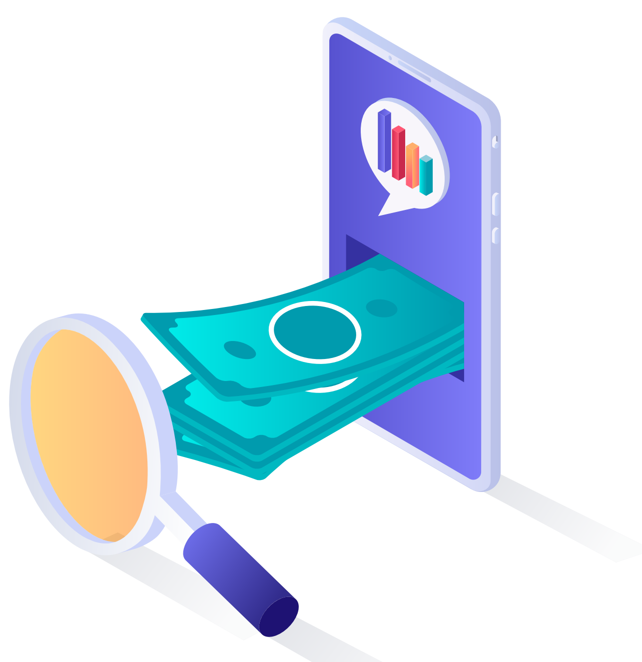
Using the right data, marketers can create win-wins within your partner ecosystem. To drive the best results, co-marketing campaigns should target the accounts that have the highest propensity to buy. PartnerTap makes it easy to bring all the partner-enriched account data into your CRM where teams can then run accounts and contacts reports that generate higher results.

Use data to get more MDF from partners

MDF helps the partner world go round. It can jump-start important new partner efforts and add fuel to the fire of proven programs. MDF augments your marketing budgets and lets your teams generate more trackable pipeline when you use PartnerTap.

Oftentimes larger partners will provide market development funds for in-person events and targeted marketing campaigns. Detailed mapped account data can accelerate MDF approvals and justify more MDF funding. PartnerTap customers regularly generate twice the results with half the effort from their comarketing campaigns.

We recommend mapping all accounts with partners and using the PartnerTap ecosystem overlap reports to identify the accounts that have the highest propensity to buy in the right industries and segments, with the partners with the biggest center of influence. When you can hone your target lists – magic happens..



Selling More Within Multi-org CRM Environments

Automate account mapping and align sellers across internal CRM systems

Many enterprises have multiple CRM systems within the company. These may have been adopted organically in different regions, or across different divisions, or come in through an acquisition.

Post-M&A system integrations are a high priority, but the CRM systems are typically one of the last applications to be integrated. Each CRM instance is heavily customized, making it difficult to integrate without losing sales momentum.

Automate account mapping in multi-org CRM environments

What if you could align all your sellers around their shared accounts without integrating all your CRM systems? With PartnerTap you can continue to run acquired companies and divisions in separate CRM systems while bringing the most important data together to accelerate cross sell revenue. Simply connect on PartnerTap and share all accounts (everything that maps) and greenfield accounts (every customer account and active prospect that doesn't map). This starts the multi-CRM blueprint for sales acceleration.

Whether you have multiple Salesforce, Dynamics, Hubspot, or SAP CRM instances, PartnerTap makes it easy to automatically map all your accounts across CRMs and align all your sellers on their matched accounts. PartnerTap customers easily share greenfield accounts across CRM systems, coordinate sales motions across divisions, and unlock new cross-sell and upsell opportunities.

Accelerate revenue post-acquisition

Driving revenue post acquisition starts with identifying the low hanging fruit and helping sales teams cross-sell and learn to work together.

Getting two distinct enterprise sales teams to work together is hard. Oftentimes, is hard culturally to build trust between the two teams and it's especially hard to bring everyone into a single CRM system. This makes realizing revenue potential of the combined companies even more difficult.

Reasons for this include:

1. Sales teams working in different CRM systems
2. Sales teams have different regions
3. Sales reps don't trust each other yet

Once a M&A deal closes it typically takes a long time to operationalize a joint sales motion and for sales teams to build trust with each other. Sales reps continue to work in their separate CRM systems, and it is hard for sales reps on each side to know who exactly they should start collaborating with on each account. You cannot expect your combined sales teams to realize your new revenue targets without quickly finding a way to overcome or work around each of these challenges.

With PartnerTap it's easy to:

1. Automate account mapping across all internal CRM systems
2. Get an always-up-to-date view of the current account owners on each account
3. Enable a joint sales motion to drive cross-sell and upsell
4. Identify net-new "greenfield" accounts to add and assign within each CRM system
5. See all mapped account data inside each CRM system. As data changes in PartnerTap it syncs nightly back to your corresponding CRM systems.

Enable a joint sales motion to drive cross-sell and upsell

The first step towards a joint sales motion is figuring out who at each company owns the same customer and prospect accounts. From there sales reps need some way to coordinate outreach to their shared accounts, so the prospects don't receive uncoordinated, or potentially conflicting information from the different sales teams now owned by the same company.

With PartnerTap, sales reps in each CRM system can quickly:

1. See who owns their customer and prospect accounts
2. Collaborate and coordinate outreach to shared accounts
3. See each other's past and current sales opportunities on each account
4. Coordinate outreach and account strategy across teams

See all mapped account owners inside each CRM system

With PartnerTap it's easy to push all the mapped account and account owner information back into each CRM system. Our Salesforce Managed Package adds a simple object and related list onto Accounts and/or Opportunities so your sales reps can see all the other account owners on each account right inside Salesforce.

Cross-sell to existing customers based on which products they don't yet have

The easiest joint sales motion is to crosssell into existing customers. This requires a consolidated view of which products from each company are already in place at each account. Unfortunately, installed or sold products are trapped in each company's CRM system and hard for reps on each side to pull together.

Increase win rates with the right internal leverage

To increase win rates, sales executives need to bring in the people with the right product or account knowledge to help them win the deal. PartnerTap's advanced account mapping includes account owners, product specialists, customer success managers, channel managers, account managers, and anyone else that's part of the greater account team.

Existing sales reps and CSMs can work together to influence customers to buy your acquired company products. Identifying these "better together" stories and new opportunities takes only minutes with PartnerTap reports. Our opportunity overlap reports make it easy to pinpoint which reps should be aligned immediately to accelerate your current pipeline and close more business faster.

Identify “Greenfield” accounts for each team

Greenfield accounts are customers and active pipeline that exist in one CRM database that are not yet in another CRM system. Identifying these net-new accounts gives you a powerful new source for pipeline and new logo revenue.

No matter how big your CRM database is, there are always companies out there that you don’t know about. With PartnerTap, all active accounts in all the CRM systems are automatically mapped and you can immediately see which greenfield accounts exist in each CRM system.

Here’s how easy it is to identify and share greenfield accounts with PartnerTap:

1. Each internal CRM system is synced with PartnerTap
2. All accounts are instantly mapped across all CRM systems
3. Set share settings to “include Greenfield accounts”
4. Use “Greenfield” reports to see the net-new greenfield accounts that could be shared and imported into each CRM system

If you’d like to talk more specifically about how PartnerTap can help you automate account sharing across internal CRM systems please email **sales@partnertap.com**.

Referral Partners

Increase high-quality referrals and win rates with data-informed focus

Driving revenue with referral partners starts with understanding where your teams should focus. The best place to start is finding the intersection of customer-to-prospect overlaps with accounts that have the highest propensity to buy. Teams often feel like they need to boil the ocean, but simply focusing on a narrower subset of customers and prospects can drive more revenue growth. And when you help referral partners drive more revenue efficiently you can cement a steady stream of future pipeline from these loyal partners who refer their leads to you instead of your competitors.

PartnerTap empowers referral partners to gain trust and visibility by securely data sharing with you. With PartnerTap your partner and sales teams can opt into sharing pipeline to uncover opportunities where partners can provide warm introductions. The intersection of true center of influence around shared accounts and pipeline will drive stronger and stronger referrals over time that have a higher probability of closing.

Partner-led growth expertise

PartnerTap was built to help companies drive more revenue with channel partners. At the end of the day, the only definition of a successful partnership is one that drives more revenue for both companies.

It's critical that enterprise leaders crack the code to scale partner-led revenue and lock in their best partners to maintain their position in the market. Accenture published a report in 2020 that highlighted how ecosystems are disruptive, strategically important, and have the potential to unlock $100 trillion in value over the next ten years. PartnerTap empowers channel and sales teams to unlock that $100 trillion additional value in the market.

To unlock the next billion dollars in channel revenue, enterprises must invest in a secure Partner Sales Platform that lets you share specific account and opportunity information, identify the best partners to work with on each account, and connect reps across partners to improve win rates.

PartnerTap gives enterprise partner and sales teams:

- **A secure digital platform** that makes it easy to share sensitive account and opportunity information with partners.
- **Full control over your data** and what you want to share with each partner.
- **Automated account mapping** so your channel teams can focus on go-to-market analysis and recommendations rather than manually comparing lists.
- **Opportunity sharing** so resellers can keep channel managers informed as their deals progress, and sales reps can share pipeline with select partners

- **Unique channel insights** to inform how sales teams and partners can accelerate growth in each vertical, region, and segment.
- **Partner-specific account reports** that partner marketing can use to drive targeted co-marketing campaigns.
- **New deal potential reports** that show you where your partners can help get you into new accounts and where you can help your partners sell.
- **Multi-partner account analysis** informs optimal account sales and expansion strategies.
- **Greenfield accounts** report instantly identify net-new accounts to add and assign to owners in your CRM system.
- **Shared pipeline overlap reports** so you can see all partner sales activities on shared accounts.
- **Co-selling product** connects sales reps across partners and makes it easy for them to collaborate via chat.
- **Sales manager dashboards** which let you monitor the level of collaboration between your account executives and partner sales teams.

Using PartnerTap your partner and sales teams will be able to:

- Identify net-new sales opportunities within specific partner accounts
- Identify enterprise accounts that could be expanded through partner solutions
- Accelerate new sales cycles with insights and support from partner sales reps
- Drive more revenue through resellers, especially for unattended and unassigned accounts
- Develop very targeted partner marketing programs based on a multi-partner view of each account
- Become your partners' favorite partner when you help them drive the most revenue and joint success
- Drive more partner business revenue

PartnerTap is designed specifically for enterprises that want to control your data and scale up your partner revenue machine. Learn more at **www.partnertap.com** or contact us at **sales@partnertap.com**.