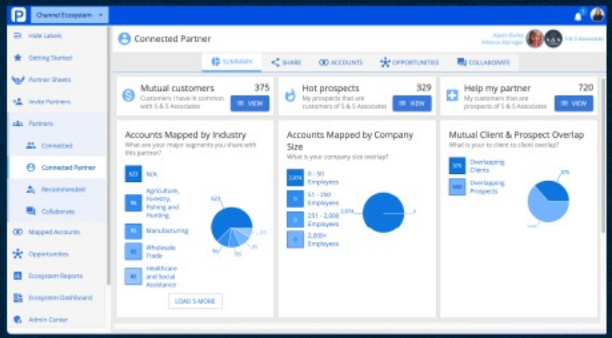
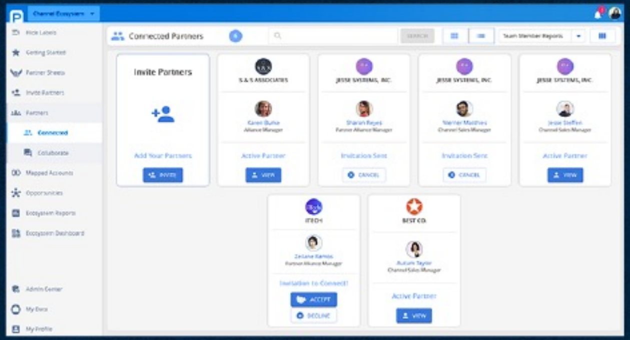
New Logo Growth in One-Click:

Partnership Revenue Growth Has Never Been This Easy

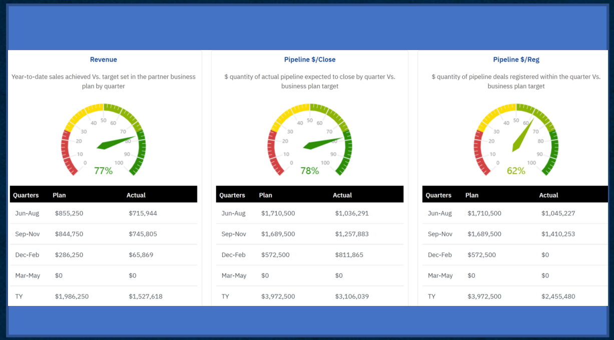
One-Click QBRs



One-Click Account Mapping



One-Click Pipeline Sharing



One-Click Performance Dashboard

Gary Morris
CEO
SUCCESSFUL CHANNELS

Cassandra Gholston
CEO
PARTNERTAP

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The secret to faster new logo growth is automation

Automate Planning

Instantly align on strategic plans with each partner

Automate Sourcing

Identify 10x new logo accounts to target with automated full CRM mapping

Automate Reporting

Instantly track progress with data pulled automatically in from your CRM and PRM

Automate Connections

Instantly connect sellers on their mutual accounts for co-sell collaboration

Automate QBRs

Instantly generate QBRs with rich data that enable high-impact quarterly meetings

Automate Visibility

Instantly share pipeline for real-time visibility to new logo pipeline

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STATUS QUO

Partner teams today lack the tools and data to source and accelerate new logo growth

Manual Process for strategic planning and QBRs

Manual Account Mapping to identify new logo accounts

Disconnected systems for partner sales data

One-off Intros between sales reps and weekly pipeline spreadsheets

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One click automation is now possible and can accelerate new logo growth

NEW AUTOMATION TECHNOLOGIES

Accelerate new logo growth with the right data, tools, and connections – in one click

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RIGHT DATA: Identify ALL potential new logo accounts with each partner

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RIGHT PLANS: Jumpstart strategic planning with pre-populated strategies, action plans, and tactics

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RIGHT CONNECTIONS: Instantly connect your sales reps with partner sellers on their mutual accounts so they can collaborate and co-sell

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RIGHT REPORTS: Instantly generate data-rich QBRs that let both sides see where they can act to accelerate new logo and partner growth opportunities

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First poll question: New logo growth

What percentage of your FY23 revenue needs to come from new logo growth?
(Select one response)

- ❑ 0%
- ❑ 1 – 5%
- ❑ 6 – 10%
- ❑ 11 – 20%
- ❑ 21 – 30%
- ❑ 31%+

End-to-end process for new logo sourcing and deal acceleration

CADENCE PLAN

01 — PLAN: Create a joint partner business plan
Cadence: One Time

Plan:
Channel Mgr. creates first draft plan

Accept:
Partner reviews and accepts plan (DocuSign)

Approve:
Channel Directors review and approve plans (DocuSign)

02 — ACTIONS: Build an action plan to achieve targets
Cadence: Every 2 Weeks

Business Action Plan:
Goals & Tactics to achieve plan targets Enablement Action

Plan:
Actions to make a stronger partner Marketing Action

Plan:
Tactics to generate demand and build brand

03 — ACCOUNTS: Map accounts and plan co-sell
Cadence: Monthly

Map Accounts
Identify mutual customers and prospects with each partner

Identify New Logos
with each partner
with each partner

Auto-Connect Reps
On shared accounts so they can plan co-sell strategies

04 — PIPELINE: Track partner pipeline & monitor co-sell
Cadence: Weekly

Track Partner Pipeline
On target accounts to ensure everything is property registered

Encourage co-sell activities
To accelerate partner deals

Improve Forecasts
with higher accuracy based on partner opportunity changes

05 — MBRs: Monthly business reviews
Cadence: Monthly

Outline of the Monthly Review:

- Program Performance Dashboard
- Task reviews
- Action plan reviews
- Account mapping reviews
- Pipeline mapping reviews

06 — QBRs: Quarterly business reviews
Cadence: Quarterly

Detailed Business Performance Reviews:

- Metrics performance-to-plan
- Capabilities Scorecard
- Business Action Plan
- Summary Task Manager

07 — SUCCESS: Support a successful partnership
Cadence: Continuously

Detailed Business Performance Reviews:

- Metrics performance-to-plan
- Capabilities Scorecard
- Business Action Plan
- Summary Task Manager

Second poll question: Top business goals for FY23

Top joint partner business plan goals:

Which of the following joint business plan goals are your top priorities for FY23?
(Select all that apply)

- ❑ New logo acquisition
- ❑ Grow core revenues
- ❑ Vertical focused campaign
- ❑ Alliance play
- ❑ Expand installed base
- ❑ Grow services
- ❑ Improve renewals
- ❑ Joint solution development
- ❑ Grow partner enablement
- ❑ Increase partner certifications
- ❑ Develop partner assets and capabilities
- ❑ Other

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PLAN

01 Create a joint partner business plan

One Time

Template-driven planning doesn’t work

Old & Disconnected

Template-Driven Business Plans Don’t Work (Not Guided / Too Hard)

Guided Systems Generate High Adoption Rates

Guided Tools, w/ Sample Values, & One-Click QBRs Gain High Partner & Channel Manager Adoption

Characteristics of Successful JBPs	High Value JBP Adoption Characteristics
▪ Guided ▪ Sample Values ▪ No “templates” or blank fields ▪ Recommended goals, strategies and tactics ▪ Auto populated ▪ Suggested actions ▪ One-click comprehensive plan exports ▪ Individual module exports	Preset Program Metrics Preset Partner Life-Stage Scorecard Metrics Preset Recommended Objectives, Activities, & Tactics Automated Account Mapping & Opportunity Sharing Pre-populated profiles, partner contacts, & Channel Team Contacts

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SUCCESSFUL CHANNELS

PLAN:

01 Create a joint partner business plan

One Time

Build partner commitments, plans and metrics to achieve new logo growth

What:

Set key targets for partnership performance

- Revenue Performance-to-Plan
- Pipeline Performance-to-Plan (By Create & Close date)
- Partner-led / company-led closed revenue
- Partner-led / company-led pipeline generation
- Partner-led / company-led selling
- **New Logos**
- Win Rate
- Cycle Time
- Certifications
- Specializations

How:

Select from recommended business objectives, activities, and tactics

Recommended Business Goals	Recommended Activity	Recommended Supporting Tactics
Net New Logo Acquisition	CAM / Partner Sales alignment	**Identify new logo accounts**
	Account map against full CRM database	Review joint messaging
	Develop New Whitespace Opportunities	**Connect sellers on shared accounts**
	Target top 50 new-to-both accounts	Telemarketing event
	Leverage ISR teams to develop opportunities	**Partner intro call day**
	New-to-both partner and brand	LinkedIn opportunity strategy

Third poll question: Managing the impossible

Partnership Joint Task Management:

What would help manage the wide range of tasks associated with driving partnership new logo growth? *(Select all that apply)*

- ❑ **Sales Enablement:** Track all sales enablement task completion
- ❑ **Marketing Enablement:** Track all marketing enablement task completion
- ❑ **Automated Account Mapping:** Enable efficient & effective partner / brand account mapping
- ❑ **Collaborative Selling:** Enable collaborative partner / brand account selling
- ❑ **Task Consolidation:** Consolidate all partnership-related tasks in one place
- ❑ **Task Status Tracking:** Track progress and completion in one place
- ❑ **Task Notifications:** Send notification and reminders of partnership task progress
- ❑ **Task MBRs/QBR:** Provide an instant / one-click task status view for all tasks

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ACTIONS:

02

Build an action plan to achieve targets

Every 2 Weeks

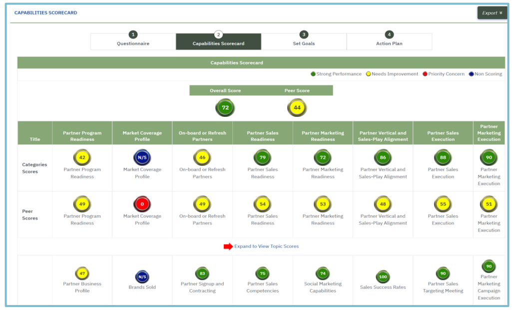
Define supporting activities and tactics to achieve new logo growth

Consolidate Partner Action Plan Tasks

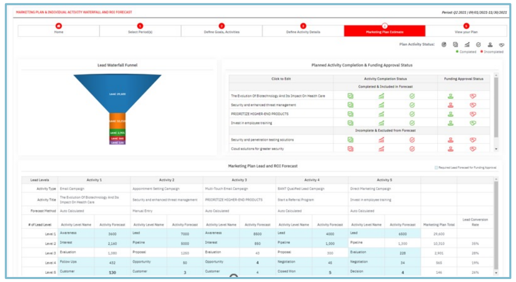
Partner Business Plans

Goal	Activity	Task & Tactics
	Account Mapping	Map Prospects
		LinkedIn Compare
	New Demand	Virtual Event
		Person Event (1)
		Person Event (2)
		Lunch & Learn
		Direct Marketing
New Logos		Whitespace work-sessions (1)
		Whitespace work-sessions (2)

Partner Capabilities Scorecard Plans



Partner Marketing/ MDF Plans



See all JBP Tasks Consolidated in One QBR View

USER LEVEL TASKS

Not Started · In Progress · Completed · Recommended

Parent Task · Child Task

Sort by: Full Task Title · All Tasks · Apply

Source	Full Task Title	Description	Action Plan Notes	Task Status	Completion Status	Planned Completion Date	Actual Completion Date
Capabilities Scorecard	Automotive	Which of the following vertical markets do you focus on?		R	Recommend	10/09/2021	
Business Action Plan	Develop Alliance 3 Target List of Accounts	-			Not Started	10/22/2022	-
Business Action Plan	Develop HealthCare Target List of Accounts	-			Not Started	08/10/2022	-
Marketing Action Plan	Direct Marketing Campaign	Invest in employee training			In Progress	11/30/2021	-
	Direct Marketing						

Showing 1 to 28 of 28 entries

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SUCCESSFUL CHANNELS

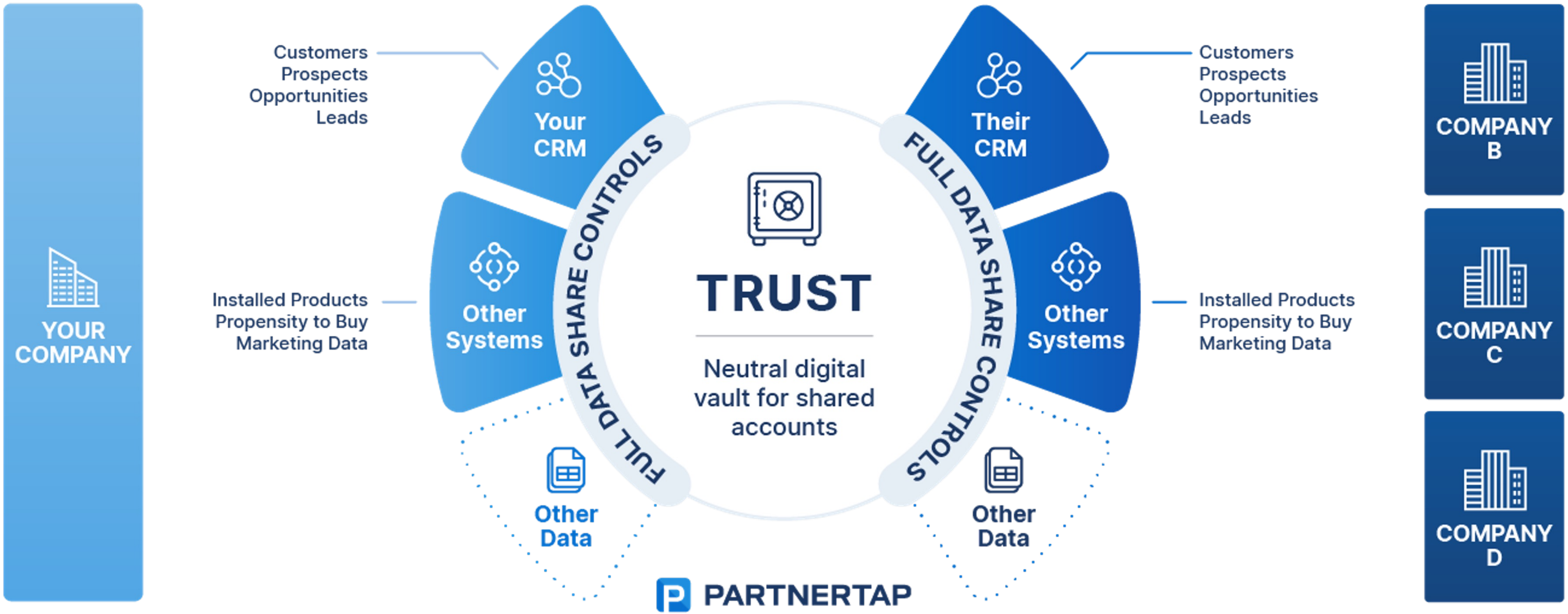
03

ACCOUNTS:

Map accounts and plan co-sell

Monthly

Automate account mapping with your trusted partners



Fourth poll question: Account mapping

How are you doing account mapping today?

(Select all that apply)

- ❑ Manually with a few partners only
- ❑ Only map our top few hundred accounts
- ❑ Only map our top 1,000 accounts
- ❑ Only map our top 10,000 accounts
- ❑ Use an automated account mapping system
- ❑ Pay a 3rd party service to map our partner accounts
- ❑ Not at all

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SUCCESSFUL CHANNELS

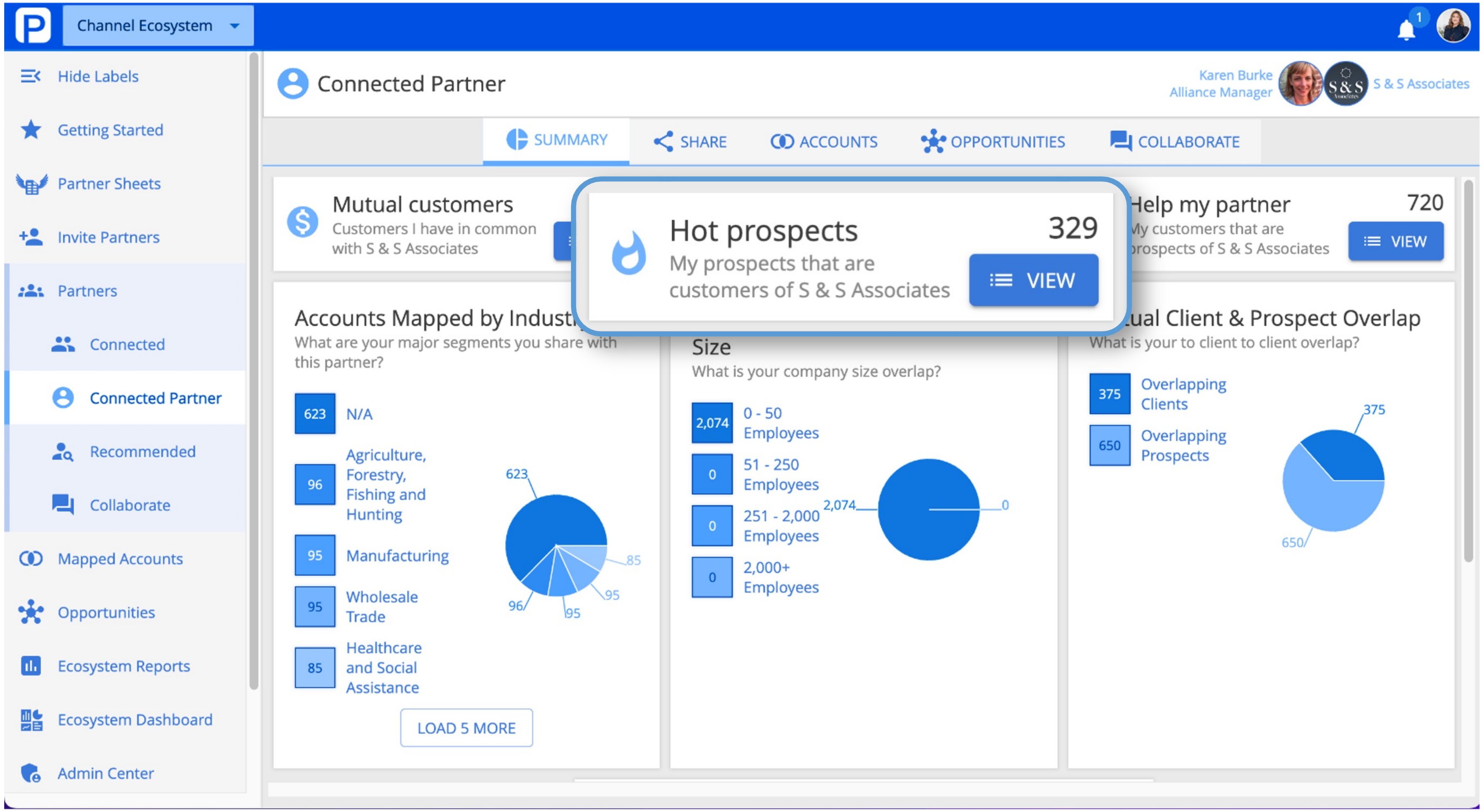
03

ACCOUNTS:

Map accounts and plan co-sell

Monthly

Identify new logo and expansion deals with each partner



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SUCCESSFUL CHANNELS

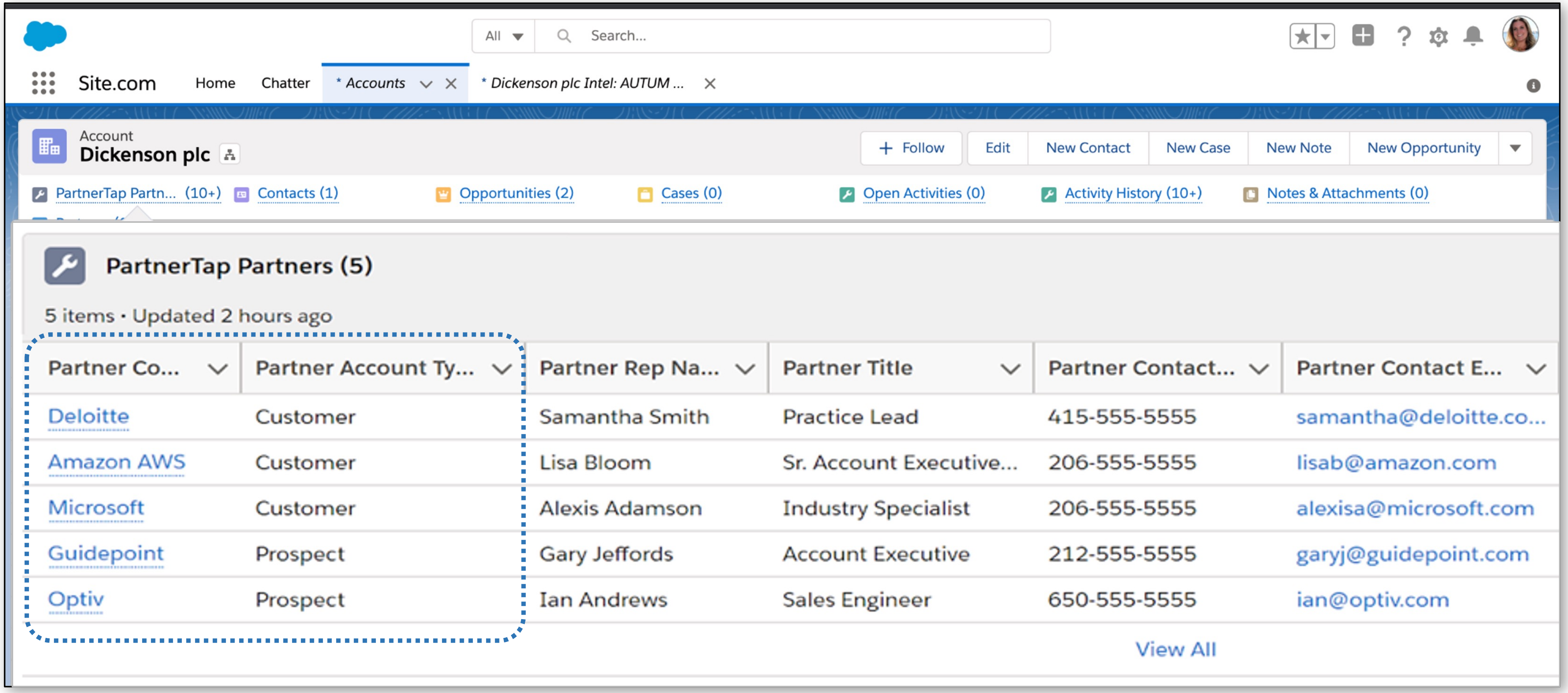
03

ACCOUNTS:

Map accounts and plan co-sell

Monthly

Auto-connect sales reps with partners on shared accounts so they can co-sell



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Fifth poll question: Partner collaboration

How often do you collaborate around data with partners?

(Select all that apply)

Account mapping

- ❑ **Weekly** account mapping
- ❑ **Monthly** account mapping
- ❑ **Quarterly** account mapping
- ❑ **Annual** account mapping
- ❑ **We don't** account map with partners

Pipeline sharing and tracking

- ❑ **Weekly** pipeline sharing
- ❑ **Monthly** pipeline sharing
- ❑ **Quarterly** pipeline sharing
- ❑ **We don't** do pipeline sharing with partners

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SUCCESSFUL CHANNELS

04

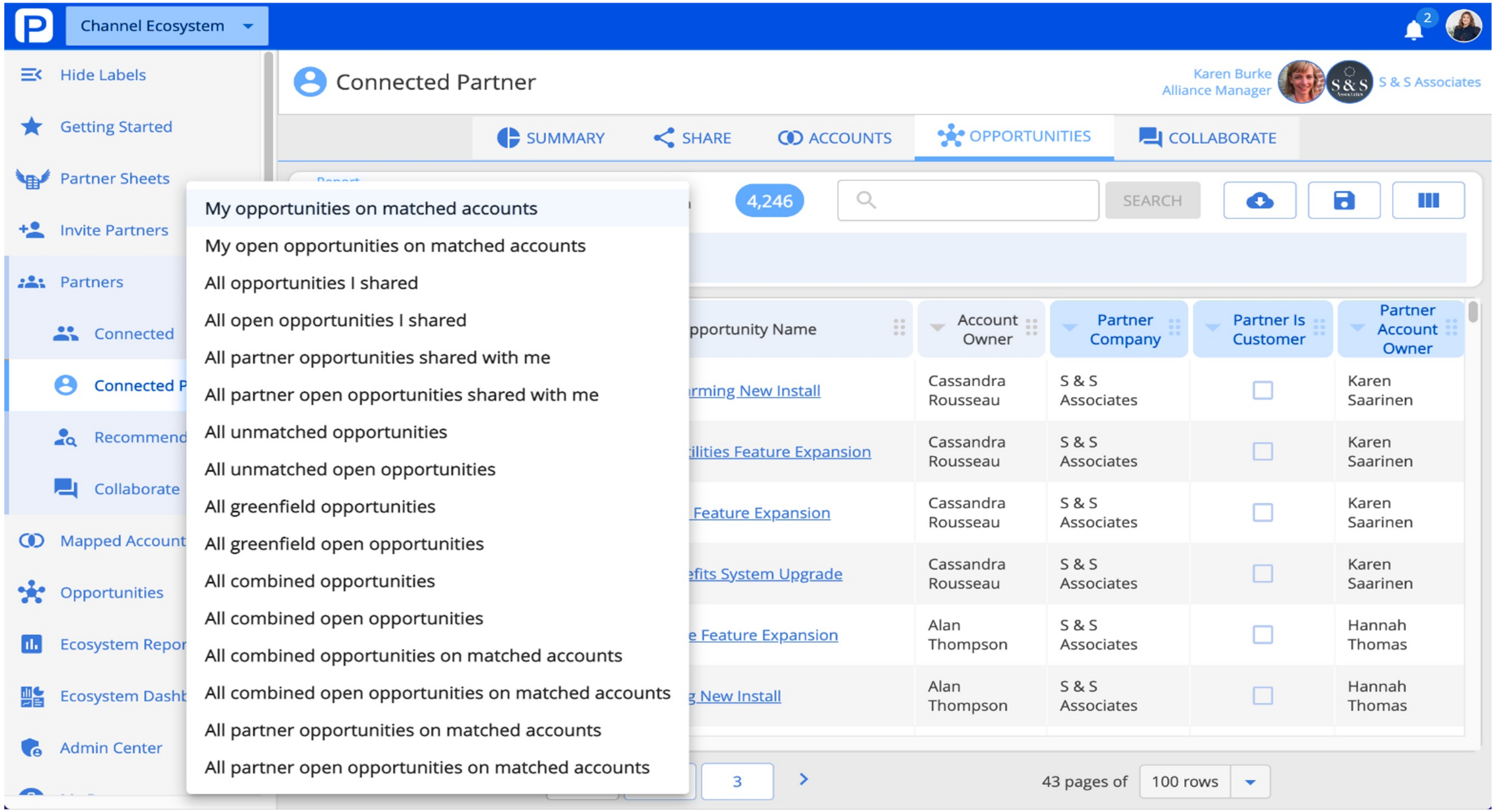
PIPELINE:

Track partner pipeline & monitor co-sell

Weekly

Automate pipeline sharing

Get real-time visibility to your partners' new logo deals as they progress



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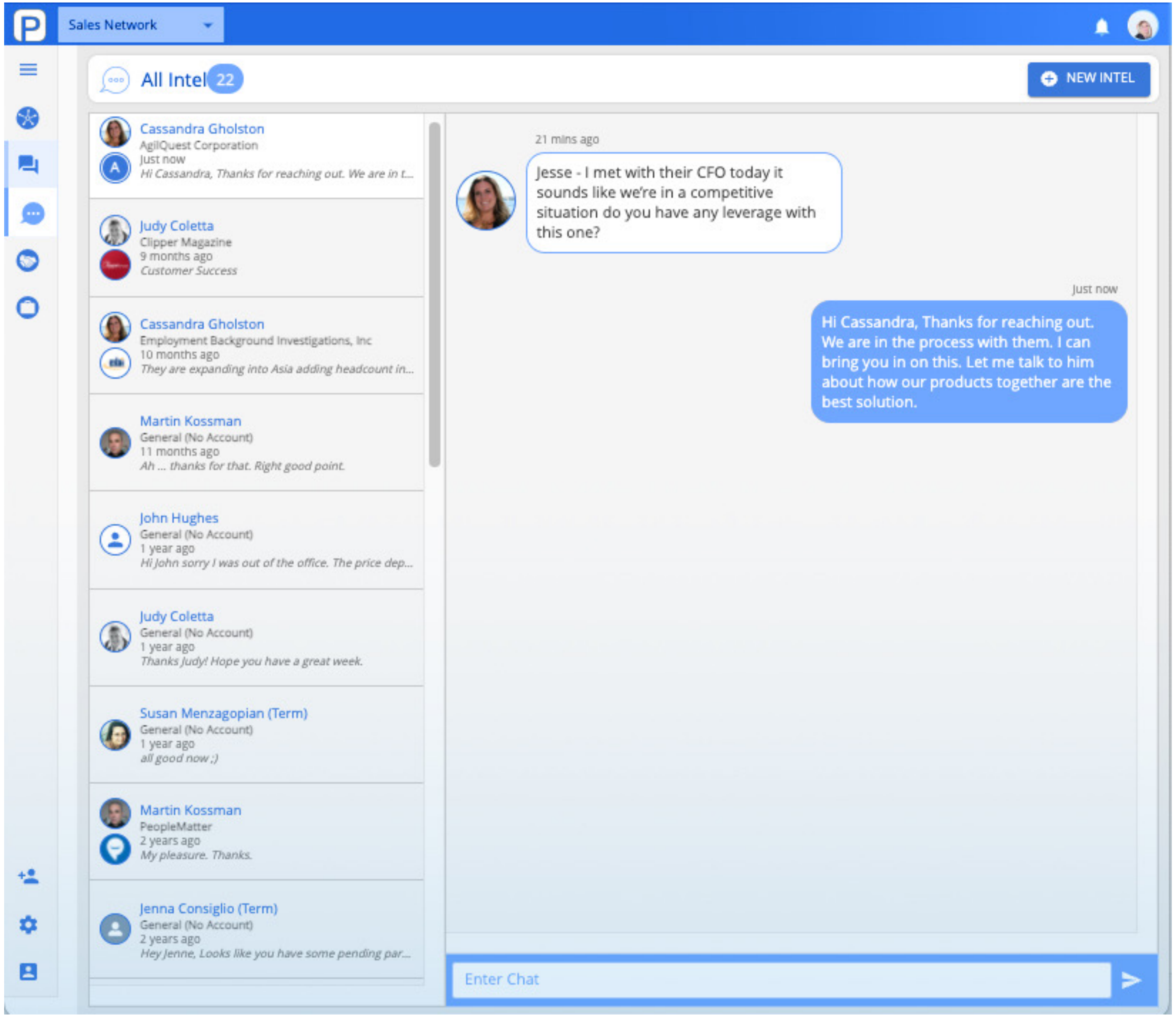
PIPELINE:

04

Track partner pipeline & monitor co-sell

Weekly

Encourage co-sell activities that accelerate new logo deals



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SUCCESSFUL CHANNELS

05

MBRs:

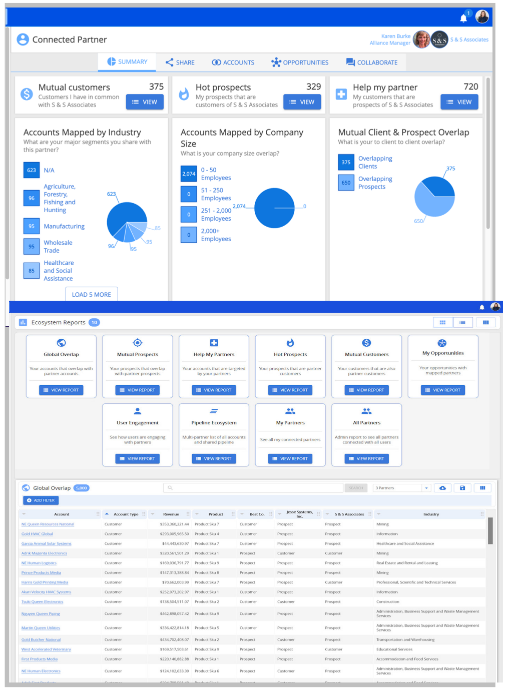
Track partner pipeline & monitor co-sell

Monthly

Review new logo goals & progress during MBRs with one-click MBRs

Customized MBR Cover Page for Partnership

Partnership Performance Dashboard



New Logo Targets & Shared Pipeline

Partnership Consolidated Task Manager

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QBRs:
Quarterly business reviews

06

Quarterly

Comprehensive JBP QBR with all planning & performance tracking elements in one click

All elements of a JBP updated in one-click:

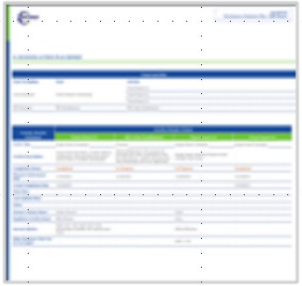
1) Program performance
2) Capabilities scorecard performance
3) Task status summary
4) Business action plan status
5) Account mapping and pipeline co-sell
6) Marketing plans
7) Team review

MBR / QBR HOME PAGE AND INTRODUCTION

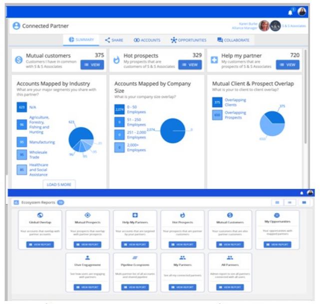
PARTNER PERFORMANCE DASHBOARD

CAPABILITIES SCORECARD AND ACTION PLAN

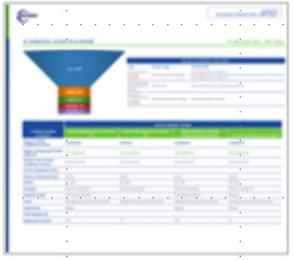
CONSOLIDATED TASK MANAGER



BUSINESS GOALS, STRATEGY, AND TACTIC PLANS



ACCOUNT MAPPING, PIPELINE SHARING & CO-SELL



MARKETING ACTION PLAN & NOTIFICATIONS

CHANNEL TEAM & PARTNER ACCOUNT SUMMARY

SUCCESSFUL CHANNELS

07

SUCCESS:
Support a successful partnership
Continuously

Best practices for sustainable new logo growth and partnership success

A) Clear Targets
Hyper-targeted lists of new logo accounts with full CRM database mapping in one click

B) Clear Goals
Agreed upon business goals & measurements with each partner

C) Detailed Plans
Detailed plans that coordinate the actions to achieve goals

D) Sales Connections
Make sure your sellers know exactly who to engage on each new logo account with each partner

E) CM Support
Regularly review the progress of new logo growth with each partner with one-click QBRs and MBRs

F) Partner Credit
Track and measure new logo pipeline, wins, and revenue with each partner

Feed all new logo opps into your systems for:

- Deal registration
- Process compliance
- Partner influence
- Partner visibility

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SUCCESSFUL CHANNELS

We're here to help you automate your new logo sourcing and growth

CADENCE PLAN	01	02	03	04	05	06	07
	PLAN: Create a joint partner business plan	**ACTIONS:** Build an action plan to achieve targets	**ACCOUNTS:** Map accounts and plan co-sell	**PIPELINE:** Track partner pipeline & monitor co-sell	**MBRs:** Monthly business reviews	**QBRs:** Quarterly business reviews	**SUCCESS:** Support a successful partnership
	One Time	Every 2 Weeks	Monthly	Weekly	Monthly	Quarterly	Continuously
	SUCCESSFUL CHANNELS	SUCCESSFUL CHANNELS	PARTNERTAP	PARTNERTAP	SUCCESSFUL CHANNELS	SUCCESSFUL CHANNELS	SUCCESSFUL CHANNELS

New Logo Growth in One-Click

Q&A discussion