

REVEAL

The Ultimate Partner Program Guide

Learn how to build a high-impact partner program that will deliver speed to value for your customers, and tangible ROI to your business.

Foreword

What does it mean to have a high-impact partner program?

It comes down to two main things. Delivering ROI, and faster speed to value for your customers drives these outcomes through strong and data-driven partnerships and soon enough your [Partnerships team](#) will be a revenue force to reckon with.

Chances are that if you've landed here, you've been given the daunting task of starting up a [partner program](#) from scratch. Or you're refreshing your existing program to develop new strategic revenue-generating partners—congrats.

The great thing is that you don't actually have to go sit in front of a whiteboard and draw up a partner program from scratch. You can talk to your customers to see who they work with, and look at other businesses in your industry to understand how they partner and what their programs look like.

Before you try and build some massively innovative program, you should start by imitating your favorite ones. Imitate, and then iterate on your design.





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Sometimes being a Partnership Manager can be a hard task, and not knowing where to start can be a nightmare. A partner program will enable collaboration between partners and internal teams, which will make your job a lot easier.

Why a Partner Program?

You know the old saying, “It’s who you know”? Well, this doesn’t exactly ring true in the world of Partnerships—It’s not only *who* you know but who **they** know as well.

“

68% of business leaders believe that ecosystems are the only way to success in today’s market.

EY,
The CEO Imperative Report

”

The further entrenched your company gets in your ecosystem, the more channels you will uncover to [fill pipeline and drive revenue](#). Companies in the same [ecosystem](#) can have shared customers and prospects, and in a partnership they are not competing for attention, but rather, join forces to reach their shared audience together.

What better proof of partnerships’ impact on growth than Salesforce, HubSpot, Zapier, and Qualtrics; some of the most successful B2B Tech companies that incidentally invest significant efforts into building strong partnerships. Or look at how Walmart and Microsoft’s strategic alliance in 2018 helped them address their mutual competitor Amazon.

Two heads are better than one.

“**Harnessing the power of partnerships** is one of the best growth strategies that an organization can pursue.”



Andrew Newton
Managing Director,
BXP UK

One of the essential aspects for success is that the [collaboration](#) is mutually beneficial (win-win). Here are some examples:

Organic expansion: By partnering with a company in a new market, or through targeted co-marketing / co-selling efforts.

Increasing brand “stickiness”: For example, an integration that solves an important use case for your customer could be enough to make them decide to renew for another year.

Widened sales reach through partner sales enablement: There is an increase in sales knowledge which dramatically benefits both companies such as [higher win rates](#).

“The right time to start creating a partner program is **today**, because the world is moving towards ecosystem and partners, and is **what customers expect**.”

It's all about creating a partner program that not only benefits your business but also your partner, and your customers. It's creating a win-win situation for everyone involved.

What is a High-Impact Program?

It's about crafting a partner program that will yield ROI and predictable and meaningful outcomes for your business, your partner, and your customer.

How do we move away from the dreaded ongoing perception of Partnerships teams being the “coffee meetings” department? *The difference is in the [ROI](#).*

If you can prove that your program is generating revenue and important business and customer outcomes thanks to your partners, you'll be turning the previous perception into a very different one that sounds more like, “We owe our biggest deals to the [Partnership team!](#)”

Dan O'Leary, Director of Partnerships at Box, tells us that he finds it helpful in partnerships to frame their mission in the lens of the customer. We all serve our customers, and the problem we are solving for them is to increase the speed to value.

This is what he values as a business buyer, and even as a personal consumer because the sooner you are getting value back, the happier you are going to be.

Customer + Partner = Faster Speed to Value

So having a high-impact program also means helping your customer achieve speed to value by having the best partners aligned into ideal customers so that the more they help customers, the more value they create, and the more everyone grows.

If you charter and build a partner program that is focused on creating value for your customers and your partners, your own partner business will be setup on a foundation for sustainable growth and success.

Everything in this book is about how to build a partner program that will deliver that [speed to value for your customers](#), and ROI to your business. It all starts from the foundations of your program.

When looking at creating a high-impact partner program, you need to consider the 4Cs:

- **Capabilities:** Identify where your partner is located, how they work, and what they can bring to the table.
- **Competencies:** Identify your partner's best skill, and what they love to do.
- **Capacities:** Identify how much they can carry, what type of certifications they have, their technical and go-to-market skills.
- **Culture:** Know how your partner will act when you're not in the room. Look into their website, check out their mission statement and their commitment to diversity or sustainability. Learn who your partner is, what they care about, and what they value.

Further, it's specifically understanding:

- *Key questions* to ask from the very beginning before you partner
- The *partnership life cycle*
- *Best practices* and common mistakes
- How to *measure success* (PS. [there's a course for that](#))

We'll address these points and more, in addition to sharing some tips and tricks from the field. This book is most relevant for B2B Technology companies, although many of the tips are certainly transferable.

Spoilers, at the finish line we've also left you two free templates to take away with you. *Hint:* They'll help to speed up the onboarding process!



When building a partner program from scratch, it's easy to fall into the tactical trap. There are important questions that should be answered to ensure you're leading a program that aligns with and has the best chance to fulfill your company's desired outcomes.

Key Questions to Start With

When building a partner program from scratch, it's easy to fall into the tactical trap. Here are a few important questions that should be answered to ensure you're leading a program that aligns with, and has the best chances to fulfill, your company's desired outcomes.

It's tempting to dive straight into a partnership as a new [Partner Manager](#). You might have a perfect coffee-chat with a potential partner at a conference, and you suddenly can't wait to do some co-marketing campaigns together and sign a partner agreement. Feel familiar?

Hold your horses there cowboy. Before you know it, you might find yourself launching a channel partnering strategy with no process, no support, and nothing to help facilitate the partners' success outside of a single campaign or deal.

When a partner is not performing to expectations, most of the time, they're not supported with the information, tools, and processes that they need to be successful and it's all too easy to attract and sign up partners that you are unlikely going to be successful with.

So before any partner contract signing meetings take place, you need to first be very clear about the intentions of your overall program, and your partnering criteria of who you want to be working.

It all starts with *planning*.

“ Planning is **so critical** because it’s going to help you not just understand what’s important to your partner, you have to be able to articulate the value of the partnership to your partner and to your joint customers.”

Here’s your checklist of questions to answer to before launching your program. Click the boxes to check them off as you go:

- What are the goals of your company?
- What are the goals for your partnership program and how do they support the company?
- What type of partners does my company need to execute on that strategy?
- What’s the right structure for the program for our customers and partners?
- What tools should be in the Partnership Team’s tech stack to help us grow and scale?
- What are the right metrics to measure success?

What are the goals of your company?

The goal for all B2B companies is to drive more growth and [revenue](#). But if we get a bit more granular, the methods of how B2B companies do it are not always the same, for example:

- Do you want to *expand* into a new market?
- Do you want to *increase* brand awareness?
- Do you want to *integrate* with another technology that supports yours?

Your partner program should directly correspond to the goals of your company. Without knowing your goals, you can't develop the right program.

What are the goals for your partner program?

With the understanding of the company's goals and strategy—how can partnerships support the goals?

The key here is to be *realistic*, *transparent*, and *synchronized*.

- What are your goals for 6, 12, 18, and 24 months?
- What are the leading indicators of success?

Partnerships take time to setup and create and take even more time to start generating ROI for all parties.

Partnerships are like plants, they take time to thrive and grow.

Ensure that your C-level and all related stakeholders are on the same page about your goals, timelines, and the program’s progress and communicate your progress along the way.

If you’re still unable to identify the goals for your partner program, it’s always good to compare partnerships to plants.

The table below describes the 4 stages of a growing partnership along with the KPIs you should be considering during each step.

Stages of a partner program

Partnership stage	Scout	Plant	Grow	Harvest
Stage definition	Hunting for new partnerships	Setting up new partnerships	Co-enablement on the partnership	Drives revenue from the partnership
Number of partners	Lots	Less	Few	Fewest
KPIs	# of meetings completed # of companies reviewed # of companies qualified	# of business plans completed # of partnerships signed # of press releases	# of partners/people enabled # of certifications achieved # of integrations launched	# of leads driven \$ pipeline \$ closed/won revenue

You need to create some milestones that you can achieve and use to track and measure your program’s success. But be sure to be *realistic* about the goals and objectives you set.

What types of partners does my company need?

A common reason why a companies' partnerships do not produce ROI could be not having the right type of partner program in place, or the wrong program fit for the types of partners that you need.

To shed some light on this confusion, we can [categorize partners](#) broadly as being strategic partnerships, channel partnerships, or tech partnerships.

Strategic Partnerships are non-competitive businesses that complement one another (i.e. a brand design company with a digital marketing agency, or a big tech company whose platform you rely on).

Channel Partners could be a company partnering with a manufacturer to distribute their products or services (i.e. a local winery partnered with a local grocery store) or regional reseller who implements backup software for accounting firms.

Tech partnerships are relationships between two tech companies that are mutually beneficial where technologies compliment one another, for example apps in the Box App Store.



What is the right structure for the program?

While there may have never been a *perfect* program (yet), there are many ways you could structure your program to achieve it, and the right one depends on your company's goals and the needs for the program.

Here are a few examples of the traits of companies with successful partnerships organizations for inspiration:



Attentive: The Partnerships team at Attentive meets every other week cross-departmentally. Every team is included in these meetings, including Product, Marketing, and Product Marketing. Through these integrated meetings, Attentive has effectively built a curated team that includes dedicated marketing and engineering resources.



Chargebee: Chargebee wanted to develop their existing partnerships into active relationships to better serve and collaborate with them. To do so, they took six months to learn what their partners needed. They then structured a new technology program. That one program turned into four distinct programs with different approaches and different targets for each Partner Manager.



Mailchimp: The Mailchimp Product Partnerships team currently reports to the Chief Product Officer and is composed of multiple departments. This includes Partner Management that handles Business Development and Account Management. It also includes Product Management, Partner Operations, a Developer Community, and a newly added Solution Engineers and Project Managers.

What should be in the Partnership team’s tech stack?

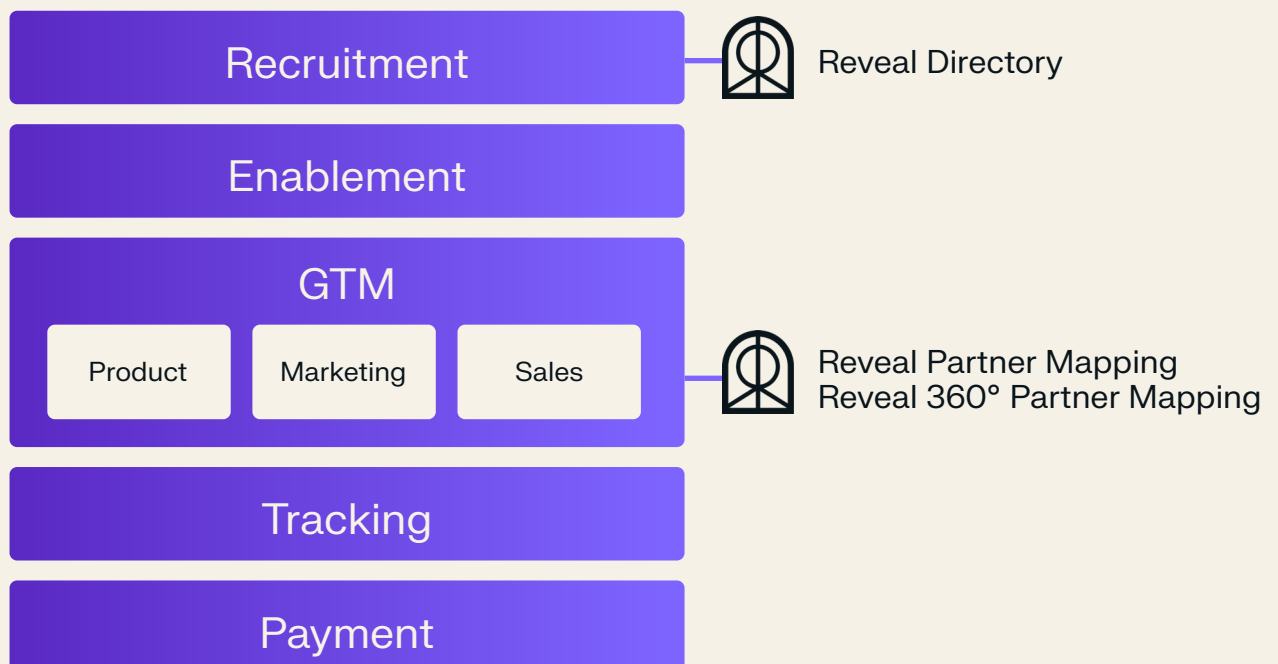
Even if your strategy might vary, technology could help save you a few headaches along the way.

There are various technologies to build your Partnerships Tech Stack, but here are three key assets that every Partnerships team should have in their arsenal:

Account mapping tool: Use an account mapping platform that works with your CRM but also the CRM of your partners. You can use a free and secure one like [Reveal](#) to get started.

PRM: You also may want a [Partner Relationship Manager](#) (PRM). With a PRM, you can simplify your onboarding process with your partners, ensure that all “better together” content is available in one place, and pay affiliate commissions.

Collaboration: You can set up a Box folder with all of your Prospective and Current Partners, and this is where you can keep all of GTM marketing materials, videos, contracts, meeting notes and proposals. This information can also be linked to your [CRM](#), and communication apps like Slack or Teams.



What are the right metrics to measure success?

The [metrics](#) that Partnerships Managers use will indicate where their department belongs in the organization.

Often the KPIs of partnerships are the same if not very similar to that of the [Sales team](#). For example:

- Tracking conversion rates from EQLs, or ecosystem qualified leads
- Tracking partner-sourced and partner-influenced deals
- Upsell / cross-sell rates and sales velocity

(See [our course here](#) to find out more about how to measure partnership ROI.)



To have a successful partner program, you should invest time and resources throughout the partnership life cycle. There are techniques and tools that you can use in each stage to maximize the impact of your partnerships.

How to Build a Partner Program in 7 Steps

If you're entering the world of partner programs, you better be well versed in the ins and outs of partnering. Including the typical partnership life cycle.

1 Identify partners

- Send invites
- Account mapping

2 Present program

3 Onboarding

- Define goals
- Define joint value proposition
- Define activities and timeline

4 Account Mapping

Find customer overlaps using spreadsheets or an account mapping platform

5 Build a Pipeline

To *influence* an existing opportunity.
To help *source* a new opportunity.

6 Co-Selling

- Add opportunities to CRM, and edit partner fields
- Reporting to the business
- Sales engagement

7 Reporting and Reviews

- Lookback
- Evaluate success
- Set next goals

Stage 1:

Identify partners

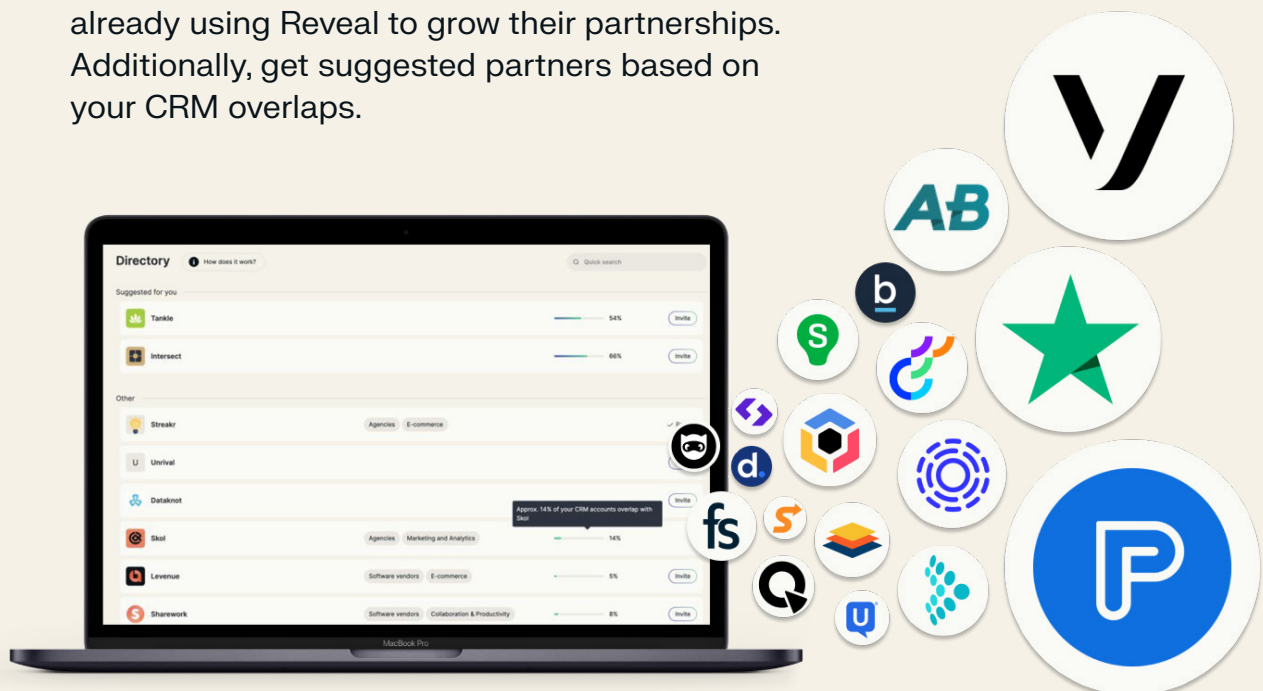
To build out your program, start with partner recruitment. Take some time to do the research to get a strong “dance card” of people to meet and connect with.

Do your research!

We’ve always emphasized that identifying the right partners should start with a deep understanding of your customers. For example, you can take a look at your average customers’ tech stack, or listen to which integrations they are constantly requesting. There are a few ways to get that information, including:

- Customer interviews
- Public sites like stackshare.io, builtwith.com
- Your customer forums
- Your Customer Success team
- Social media

Use the [Reveal Directory](#) to connect with companies already using Reveal to grow their partnerships. Additionally, get suggested partners based on your CRM overlaps.



This initial research should give you a decent list of potential partners. From there you can go further and evaluate them on other important factors.

“ If you’re using the right tactics with the right partners, and if you have the right customer in mind, and you really understand the problems you’re solving for them, you can easily drive **triple-digit growth** with partners. ”

Depending on your partner program goals, you should have a good idea of the right profile you’re looking for. This could be by industry, technology alignment, brand mission alignment. And one important one:

Minimum number of customer overlaps. How many of their customers or prospects match yours.

(*Note:* This is where [Reveal](#) comes in handy to give you quick insight into customer overlaps to assess partnership potential.)



Stage 2:

Present program

Go on the roadshow to introduce yourself and your company to these shortlisted partners. This is the moment to get your strategic partnership proposal ready.

Present your partner pitch deck

How do you get a partner interested to collaborate?

One of many important factors is a partner pitch deck.

The objective of this deck is to show prospective partners:

- Your company (and notable achievements)
- Your product value proposition
- Why join the partner program and why now is the right time
- What makes you different
- Support and resources provided
- What's in it for them

Use these introduction meetings also as an opportunity to understand their business:

- What are the goals of their company?
- What are the goals for their team and individuals?
- How do they define and measure success?
- And importantly, how do their goals connect to mine?

Send the Partnership Agreement contract

If they meet your criteria and you have the answers to these all-important questions, it's likely the right time to send across the Partnership Agreement.

Work with your Legal team to create your standard Agreement template. But you don't need to spend too much time here trying to craft the perfect document. Instead here's a tip to ensure there is less friction in the process:



Help your new partners with an easy-to-navigate and easy-to-sign Agreement. One that doesn't require a ton of time with lawyers to figure out. Provide a handy FAQ for any key terms, and a business explanation for provisions that may be unfamiliar to your partners



Stage 3: Onboarding

You've both signed the agreement, now the partner onboarding begins. Set up a kick-off meeting for both your teams to get acquainted, and agree on the right balance and cadence for your ongoing communications.

What's the best frequency for meetings? Weekly, monthly, fortnightly? What channels do you need to keep in touch? Is email enough or do you need a Slack Connect channel? There are also various different ways to manage partnerships but here are two useful frameworks / tools that will serve you well:

- Joint Success Plan (or JSP)
- Workstream tracker



Do an informal kick-off with a partner peer first before a larger formal kick-off with many stakeholders. You can work with your peer to draft the JSP and workstream tracker, then validate it and fill any gaps with the wider group.

Joint success plan

The idea of a joint success plan comes from the world of Customer Success; it's a simple but powerful tool designed to help solution providers work hand-in-hand with their customers to drive alignment and establish shared ownership over goals and activities.

This could also be a useful tool for managing [partnerships](#). The joint success plan with a partner helps to outline the objectives, desired business outcomes, milestones, and key owners within the partnership.



Workstream tracker

Once you have the joint success plan that lays out how you will both *align* and *navigate* through the partnership, you can also use a workstream tracker to manage and track the progress of your joint activities. You can also treat this as an onboarding checklist to ensure your partner is going through key steps in the early stages of the partnership together such as partner enablement on your product.



Good news—we've put together a free Joint Success Plan and Workstream Tracker template. Customize it to onboard your new partners.

[Download now](#)

Stage 4: Account Mapping

What is account mapping?

[Account mapping](#) is the cornerstone of partner relationships. For a partnership to generate ROI, you and your partner need to identify opportunities to help each other win. Through common prospects or customers.

To do this both companies share their list of accounts with the other. Every overlap is a revenue opportunity.

Benefits of account mapping

Account Mapping enables you to understand how to effectively work with your partner. By matching accounts, shortlist accounts to collaborate on. Deal sizes are likely to **increase by 43%** when selling to the customer of a partner.



Jo Wright
VP Revenue,
Reveal

“ Account mapping is **gold dust** to a sales organization because it gives us **knowledge**. ”

How to do account mapping

Account Mapping is done either manually through spreadsheets or through an [account mapping platform](#).

The challenge with spreadsheets is that these lists are typically exported from the CRM, which can be cumbersome.

Additionally, the same company could be named differently in the partner’s CRM, making this matching difficult—not to mention data privacy—but the new age of partnerships demands a more secure and efficient way to identify overlaps.

When you’re ready to stop doing your account mapping manually and save a heap of time, you can try a free tool like [Reveal](#) to streamline the process and mitigate security risks (by being [GDPR compliant and SOC II certified](#)).

Not to mention you have controls to customize what information you share, and with which partner.

The screenshot shows a spreadsheet titled "REVEAL Account Mapping Quick Start". It includes a header row with columns for "[This Quarter]", "[This Year]", and "Partner". Below this, there are several rows with headers for "What is the name of the account?", "What industry does the account belong to?", "Is this account a Prospect, Customer, or ex-Customer?", "Who owns this account in your Partner's org.", and "For your partner to add any relevant comments about their relationship with this account". At the bottom, there is a table with columns for "Last update", "Account", "Industry", "Status", "Account Manager", and "Comments".

Need help to get started?
Here’s an Account Mapping Quickstart template. We recommend starting with around 10 accounts to get the hang of how it works.

[Download now](#)

Need to make your case for an account mapping tool?

Not only is manually compiling this information just generally time-consuming and painful, but emailing a spreadsheet or CSV file to a with a partner filled with your customer data is a security breach just waiting to happen.

Additionally, there is a large margin for error when trying to manually match accounts, never mind the custom formulas required or data de-duping to even begin to match up your datasets. We don't know about you, but we prefer to work with partners, not troubleshoot VLookups.

Wouldn't it be better to repurpose that time to strengthen your partner relationships and [act on opportunities](#) instead?

For reference, your typical time spent to match account data with a single partner when you don't use an account mapping solution like [Reveal](#) could be as high 20 total hours of work on a typical dataset of 500-1K accounts—depending on how many fields you have to map, and how much work is required to match up the data.



Account mapping is now a **necessary step** in partnerships and opens up the ability to increase win rates, deal sizes, and integrations through **insights**.

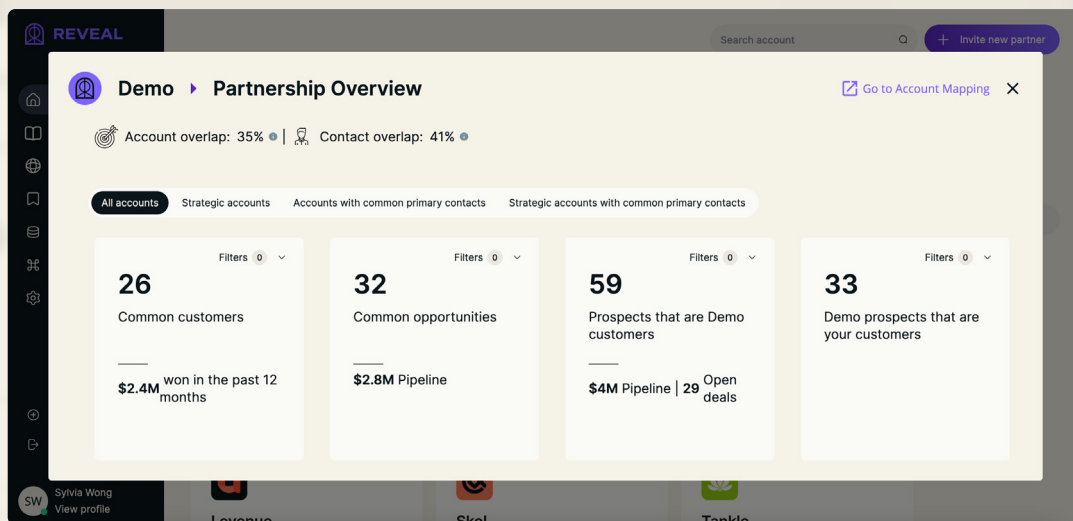
[Automate account mapping now](#)

Assessing partnership potential

[Account mapping](#) can also be done earlier in the life cycle when you're identifying partners at Stage 1.

It can be used as part of your criteria for assessing partnership potential (i.e. need to have at least X% of account overlaps or shared Users) and to [prioritize partners](#) who are most likely to help you make strategic impacts with shared customers.

For example, you could use Partnerships Overviews from [Reveal](#) to see customer overlap data at a glance before you enter into a managed or formal partnership so that you can feel confident that the partnership is being built on validated data on target market potential—not gut feel.



For peace of mind, send over an NDA.

Requesting a partner to sign a Non-Disclosure Agreement before account mapping with them is a common practice.

[Download our template here](#)

Stage 5:

Build a pipeline

Once you have your initial account mapping completed with your partner, you should have identified a few interesting accounts to collaborate and focus on. Congrats!

The next step is to have a process to [track and manage the opportunities](#) on these shortlisted accounts.

Managing your partner pipeline

Tracking these opportunities can either be done (you guessed it) via a spreadsheet again, through your CRM, or through a purpose-built platform.

As an example: When using Reveal, shortlisted accounts with partners show up in the [Pipeline view](#). You can attach your CRM opportunities on here, and tag them as either partner-sourced or partner-influenced. These tagged opportunities can all roll up to summary stats for reporting.

You can manage your CRM-linked opportunities all in one place, and, if it makes sense, you can also share your Pipeline with partners so they get visibility of their impact on our bottom line. [Find out more.](#)

Company name	Status	Owner	Partner	Type	Comments	Opportunity
Axway	Prospect	Vincent Johns...	Levenue	Influence		\$250K Negotiation
Aid Auto...	Prospect	Vincent Johns...	Levenue	Influence		\$440K Needs Analysis
Media M...	Prospect	Taylor Martin	Tankle	Sourcing	revisit in Q1	\$5.6K Prospecting
Axway	Prospect	Vincent Johns...	Tankle	Sourcing		\$250K Negotiation
Blackberry	Prospect	Taylor Martin	Tankle	Influence		Choose an opportunity 1 open
St. James&c ...	Prospect	Taylor Martin	Intersect	Sourcing		No opportunity in CRM
Transferwise	Prospect	Taylor Martin	Intersect	Influence		\$5.5K Negotiation

Stage 6: Co-selling

Sales, partnerships, and your CRM

You've spotted accounts and opportunities where partners can help your [Sales teams](#). The thing is, your Sales teams work in your CRM.

So how do you integrate your partner activities into the CRM to meet the Sales team where *they* like to work?

Many companies add custom partner fields into their CRM to their Account/Company/Opportunity records so that sales people know where partners are involved in the sales process.

A few trailblazers also embed [ecosystem insights](#) directly in the CRM so sales reps can directly see which partners can provide help.

For example, on an Opportunity page you would be able to see the name of strategic partners who are mapped into your strategic account list, and understand things like shared contacts and technologies.

Even with these processes and additions to your CRM, [co-selling](#) won't succeed without the buy-in of your sales reps, and an understanding of how to use this valuable information to help your customers.

This is where *sales enablement is key*.

To break through the Sales filter, one of the top challenges faced by Partnership teams, you need to speak the same language as them and deliver information on leads, opportunities, and deals.

Sales Enablement

What is sales enablement?

[Sales enablement](#) is the process of providing the sales organization with the information, content and tools that help salespeople sell more effectively. This is an ongoing process, not a one time exercise.

Also note that the scope of enablement is not limited to a sales organization and will likely need to extend to other functions like customer success and services as your partner program grows.

Why is sales enablement important for partnerships?

As mentioned at the beginning of the course, a high-impact partner program is one that drives revenue growth and customer outcomes for the company and for your partners. But your sales teams might not understand this immediately, or how to work with partners overall. So to get them bought in to [co-selling with partners](#), you will need to speak to them in terms they care about.

To help your Sales teams break into an account, you need to use the CAP framework with your partner. This method will help you ask for Leads (from the LOD metrics—Leads, Opportunities, and Deals):

- Use your *context* in your favor, give a short summary of where you are with the prospect
- *Ask* your partner for specific help or intel
- Have the give-first *partner* mentality; share some intel with your partner in return for their time

C = Context

(a short summary of where you are with a prospect)

Example: “Hi [Partner], I see [Company X] is a long standing customer of yours; we are currently speaking to their HR Director regarding their upcoming HR transformation project.”



A = Ask

(what, specifically, do you need help from the partner on?)

Example: “I can see that you’re connected to the CHRO, and I know they will be a key decision maker in this process; we know nothing about them! Could you help us with some intel on the CHRO’s objectives?”



P = Partner

(most importantly, why should the partner give up their time to help?)

Example: “I noticed that you have an opportunity with [Company Y], they are currently a customer of ours. Perhaps we could help you with some intelligence there, in return for your time.”

The sales enablement challenge for Partnership Managers

The biggest challenge with sales teams is that they have information filters, and sometimes information overload.

Specifically they will filter out information that doesn't touch grow one of their three key leading indicators of success: Leads, Opportunities, and Deals.

If you need a handy acronym—sales people care about LOD. If you want to be a great partner to your [Sales team](#), help them with LOD.

Now some sales leaders out there may disagree, and being interlocked with the goals of your sales team can be challenging, but you can leverage this trait about your sales teams in your favor.

“

If you give your Sales teams referral leads, **their job will be easier**, since 86% of the total addressable market is only available through referrals.”



Allan Adler
Managing Partner
Digital Bridge Partners

How can you break through the sales filter?

Wait a minute. You as a Partner Leader care about LOD too! So it should be easy right? But if you care about the same things, you may be wondering where the disconnect is. Just like hot pizza or the timing of a joke—it's all in the *delivery*.

Here are a few tips that can help you resonate better with your sales counterparts.

It might take a bit of proactiveness from your side at the very beginning, but in time by demonstrating value in a way they can understand, you'll soon see your sales reps come to you without any prompting.

Understand what matters to your Sales team and help them win.

Attend the Sales team meetings and listen in. Hear them talk about target accounts with Account Executives which could give you steer on where making partner connections can be most beneficial.

Partner Leaders can prioritize attending meetings like the Global Sales Forecast call, Sales QBRs, and regional Pod calls so that your partners can stay well aligned into the overall sales and company strategy.

Do account mapping together with them. Take the account list that you received from the Sales team, open your [account mapping tool](#), look at the accounts that the Sales team needs help with, identify the partners that can help you.

When you present the information you discovered from doing the account mapping with them, here are three things to communicate effectively.

When you discover information you discovered from doing the account mapping with them, here are three things to communicate effectively.

1/ Repeat the reasons that the accounts are important to convey that you understand what is important.

For example: “These are the accounts you said were important because of A, B, C”. While these factors will probably be unique to your organization, they will probably be things like finding common overlap, common technology, or dependant sales cycles where you and your partner win together e.g. selling a hardware and services contract together.

2/ Express that you have already taken steps to help with their important accounts.

For example: “Hi [Sales teammate], I have been in communication with our Partners X, Y, and Z to see how they can help you achieve your (Leads, Opportunities, Deals) goals. And they have notified their Sales team that you will be contacting them this week to reach out and discuss the next steps”.

3/ Give them the next step so they know exactly what to do, and why it will benefit them.

For example: “These are the Account Executives assigned to those accounts who are waiting for your call so that they can introduce you to the shared decision-makers so that you can achieve your (LOD) goal”.

Everyone loves an incentive. If you're struggling to get sales reps to tag their partner-attached opportunities in the CRM or to work with partners, you could consider an incentive program.

For example, you could work with a Sales Leader to host a competition to reward sales reps who close the most deals with partners. One Sales Manager we know hosted a Partner Prosecco hour with their team where everyone got a \$15 gift card to order a bottle of Prosecco, and then they spent the hour tagging partners and reaching out to partners.

Make their lives easier. Consider ways to help sales reps easily get relevant insights from partners. Send a Slack message if you hear an update from a partner about a key account on a separate call, and add in information that partners share with you directly back to your Sales team.

For example, [Reveal](#) sends automated weekly digests to sales reps that show partner updates on important and strategic accounts in that sales rep's territory so you don't have to.

Don't be the bottleneck. Connect your sales reps with your partner's sales reps directly so that they can [collaborate and communicate together](#). You own the higher level relationship with the partner's organization and executives, but that doesn't mean you can have to always be the middleman or involved in every conversation, especially as your partner program scales.

You might feel this is the only way to keep track of partner sourced/ influenced deals and to get recognition on your work, but by enabling your sales teams and empowering your partners you will be able to scale your efforts and impact through others.

Stage 7: Reporting and reviews

The QBR or ABR is where you can look back, evaluate your progress and goals, and set the next steps for your partnership.

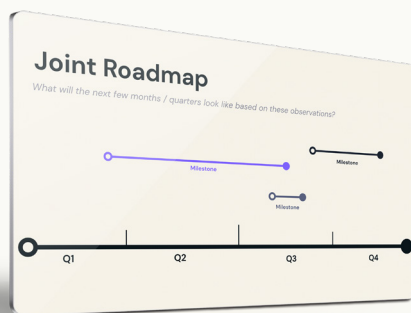
To find out more we have a whole section in our [Measuring Partnerships Success course](#) dedicated to what you need to cover in these, in the meantime, here are some of the top things.

There are two types of business reviews that matter:

Internal business reviews with your stakeholders.

Focus on the growth and sales performance KPIs but you can also highlight wins in other areas such as improved customer retention and customer satisfaction.

External business reviews with your partners. Recap what went well and what didn't go so well this quarter, refer to aligned initial partnership goals, and propose next best actions.



Good news—you can use this handy QBR template from one of our online courses to track the stats and easily report on your partnerships

[Download now](#)

Where should you report in the organization?

In a partner program that is just getting its legs, it is vital to keep in mind that this department will evolve as your programs scale up. Because of its inevitable evolution, partnerships should initially be driven by the [C-level](#) who directly corresponds with the goals of the partner program. Typically, this grows and changes as the partner program matures.

The evolution of who to report to can often look something like this:

- **Beginning phases:** CMO or CEO
- **Established and scaling:** BD or CRO
- **Robust and expanding:** CPO

So far these 7 steps have given you a plan to start up your program and get you to 10 partners.

What happens beyond that?



Final thoughts and tips

What's important to note is that the partner relationship doesn't stop your first closed deal. In fact, that's just the end of the first chapter. You don't want just a transactional relationship, or one off partnerships—that's why it's called a partnership, right?

It's not just working with a vendor.

As a reminder, Customer + Partner = Faster Speed to Value.

So when you've recruited and established a rhythm with your partners to get the engine running smoothly for the Partnership Life cycle, the next development phase is to wrap in the Customer Life cycle.

This is important because with the [right partnerships](#), companies often report much higher rental and retention, if they are smart to track it.

The Customer Success department will be your internal ally as they will have a vested interest to see these metrics improved thanks to the impact of partnerships.

Before you go out and build your ideal partner program, consider the following tips:

Tip 1: Connect with your peers—not only your potential partners, but also the companies in your ecosystem that have a similar product—to understand the way they give value to their partners through their partner program.

Get in touch with other Partnership Managers that work in companies with a similar size, profile, business model, etc.

Tip 2: You're not the only party that is supposed to bring value; partnerships are all about achieving mutual win-win situations. In your partner program presentation you should include a dedicated slide to set the requirements, expectations, and needs on your side, and those on your partner's side.

It has to be validated by both parties to be fair and successful.

Tip 3: Do not hesitate to adapt your goals within your partner program depending on who you are pitching to. For example, you won't want to dedicate the same amount of time to a tier three partner as you would to a tier one partner.

So after you prioritize your partners, fix your objectives depending on their importance, and then commit both sides to these objectives.

Tip 4: Begin to work on your joint value proposition alignment as soon as possible. This will help you pitch to your customers and will make your partner more authoritative internally (with Sales teams, and customer-facing teams).

Having a tangible asset with the value proposition and how this benefits your team, will ease the internal enablement.

Tip 5: Take time to introduce all relevant members of your team to key partner teams. Never underestimate the help of your Partner-Success team, they'll be the ones helping to make your journey with your partners successful.

They can assist with operations, certifications, product updates, etc.



Dan O'Leary
Director of Partnerships,
Box

“

If you really love your partners,
the **ideal ones** are easy to find.

”

Let's recap what you've learned so far..

- **Determine the goals** of your company and program before starting any partnership conversations
- **Think customer-first** when you are recruiting your partners
- **Do account mapping** so you know where to prioritize
- **Use a joint success plan** and workstream tracker to onboard your partners help them hit their goals
- **Get your Sales teams excited** about partnerships, pay extra attention to how you communicate and how you can demonstrate value

Ready for a final test of everything covered so far?

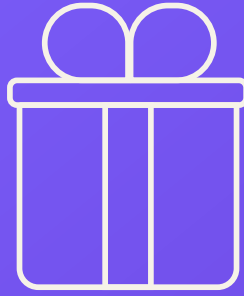
Final quiz

Let's work through these three scenarios..

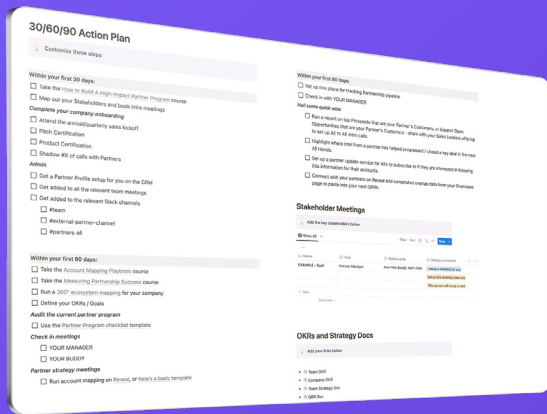
Start

press **Enter** ↵

🕒 Takes 1 minute



As a parting gift, (don't say we never gave you anything!)
We're passing you two useful templates as a **thank you** for completing this book:

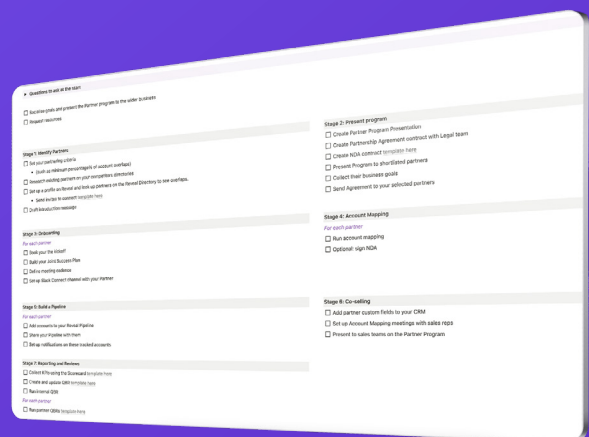


Here's a **Partnership Manager Training Plan** template. Use it if you're new to partnerships, or as it to your onboarding plan for new hires in your team.

[Download now](#)

Here's a **Partner Program Checklist** template. It distills all the learning from this course into a step-by-step list you can follow, or share it with a friend.

[Download now](#)



The learning journey doesn't stop here!



Check out this [on-demand masterclass](#) with Reveal's Noémie Goubin, and Box's Dan O'Leary.

And while you're at it, also take a look at a previous webinar with BXP's Andrew Newton covering:

- **What to consider** when building a partner program
- **Biggest mistakes** tech companies make when building their partner program
- **How to drive revenue** from the partner ecosystem



We'd like to thank everyone who collaborated on this book, we'd *especially* like to thank **Dan O'Leary**, Directory of Partnerships at Box, for sharing so many of his expert insights, best practices, and lessons learned over the years.

To go further in this journey, here are some resources that will help you master the Partnership Manager role:

- Learn how [automated account mapping](#) can help you to drive revenue by expanding reach within your company's ecosystem.
- Learn how to add [Nearbound leads](#) to your existing sales funnel.
- Learn how to [integrate your role as a Partnership Manager](#) into the fibers of each depart of your company.



If you haven't yet, it's time to put all this learning into practice—[create your free Reveal account](#) today and discover how securely connecting your CRM to instantly map accounts with partners can make all the difference in reaching partnership success and ROI.

