The Partnerships Playbook

A complete guide of proven strategies to build, scale and manage high-impact partnerships.

HYPERGOLIC

Success

By implementing these methods we've achieved:

$8M+	Revenue
5,500+	B2B Leads
$50M+	GMV
9x	↑ Leads with the Zap
25%	Faster Sales Cycle

Some of the companies we've worked & partnered with billd AUTODESK ServiceTitan PROCORE PermitFlow

AIA Contract Documents GCPAY planHub constructconnect Formwork Labs

Contents

Why Partnerships Matter 01

When is the Right Time to Build Partnerships? 02

Build the Right Team 03

Define Your Ideal Partner Profile (IPP) 04

Create Your High Value Target (HVT) List 05

Set Up Your ELG Tech Stack 06

Effective & Efficient Outreach 07

Negotiate Win-Win-Win Deals 08

Launch with Momentum 09

Lead with Consistent Reporting 10

Expand the Partnership – **The Zap** 11

Why Partnerships Matter

Logo Growth

Partnerships can drive upwards of 35% of new logos and new revenue.

Fast, efficient growth by leveraging your partners' brand, reputation, data and relationships.

Stickiness & Retention

Increase net revenue retention by continually delighting your customers and providing them with solutions you won't build yourself.

Build Your Moat

Secure and defend your lead in the market with relationships and integrations through partnerships.

M&A

Accelerate your chances of being acquired, or

More effectively determine the right acquisitions for your organization.

When is the Right Time to Build Partnerships?

Deciding to build a partnerships program depends on your company's stage and readiness. Key questions to assess:

- **Do you have a well-defined Ideal Customer Profile (ICP)?** With roughly 100-150 B2B customers, you should understand your ICP clearly.
- **Is there leadership buy-in?** Partnerships require commitment, resources and alignment with company goals.
- **Are you ready for logo growth?** Partnerships leverage a partner's reputation, brand and relationships to efficiently acquire customers.

If these criteria are met, proceed with clear objectives, such as a specific number of new customers or ROI multiple. Successful partnerships can drive significant % of net new revenue, though success hinges on leadership support, the right team and a robust tech stack.

Build the Team

Reverse-engineer your team based on your goals:

Full Commitment

Hire a dedicated VP or Director of Partnerships to lead.

Testing the Waters

Start with a part-time consultant.

Scaling Up

Add partner managers and a partner development rep for outreach and success.

Partnerships are collaborative, requiring cross-functional work with marketing, product, sales, legal and customer success. Ensure these departments are prepared to support.

A single dedicated person is essential to launch the program effectively.

Define Your Ideal Partner Profile (IPP)

For logo growth, identify partners with high potential to deliver results. Create an IPP by defining:

- **Mutual Customers:** How many mutual customers does it take to clearly define there’s great synergy potential?
- **ICP Overlap:** How many ICP customers of your partner make them ideal?
- **Partnership Potential:** Assess their partnerships team, referral ability, integration potential, digital reach, brand and customer influence.
- **Product Synergy**: Ensure your solutions complement each other for pitching, content and integrations.
- **Speed to Launch**: While the largest partners might have the largest ICP TAM, how critical is speed to launch for the success of your partnerships?

Build an algorithm to score partners based on these factors, refining with data from conversations and tools like clay and Crossbeam.

Example IPP

This IPP outlines the characteristics of a strategic partner that aligns well with our business objectives:

- **Number of Mutual Customers:** 10+
- **ICP TAM Accounts:** 1,000+
- **Strong Levels of:**
  - Partner Influence on Accounts
  - Partner Sales & Marketing Resources
  - Partner Brand Presence
- **Product Synergy**: High overlap in product/service solution
- **Potential Speed to Launch Partnership**: Fast

Our algorithm weights those aspects most important (mutual customers, ICP TAM, product synergy) so we prioritize partners with the highest chance of success.

Create Your High Value Target (HVT) List

From your IPP, build a prioritized list of ~20 high-potential partners (Tier 1/ HVTs). Others are Tier 2 (later, you may add a third tier for scaling).

Identify Known Partners

List non-competitive industry leaders or strategic investors.

Leverage Marketplaces

Explore partners' public marketplaces for their Tier 1 partners (i.e. platinum/gold badges).

Check Integrations

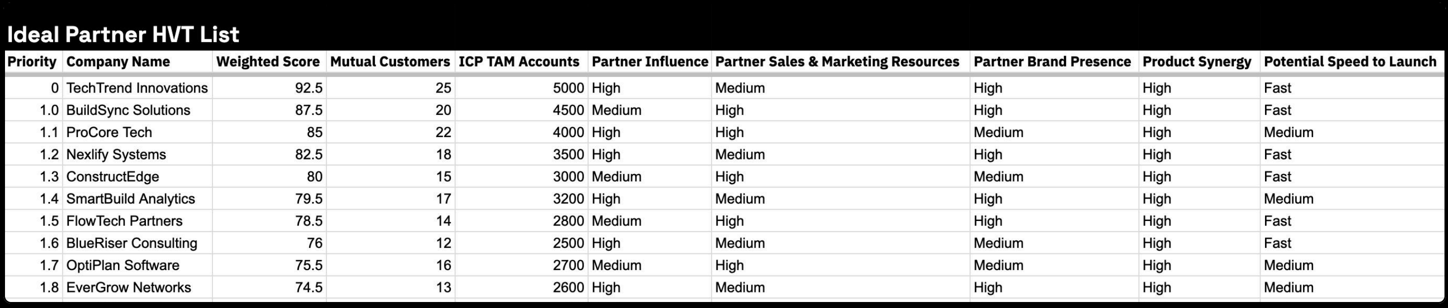
Review integration pages on major platforms to find ecosystems with ICP overlap.

Evaluate the best types of partners to work with to achieve your goals: tech partners, affiliates, associations, resellers/VARs, consulting groups and suppliers.

Use AI Tools: Input your IPP into AI platforms to discover and validate partners. Rank partners numerically (e.g., Your Top Partner = Partner 0, HVTs as 1.1-2.9, others 3+).

Example HVT List

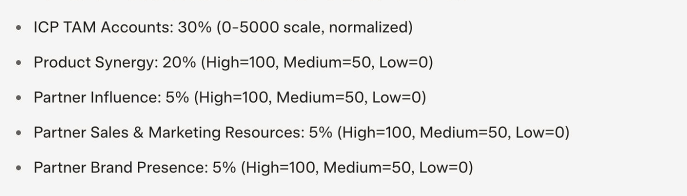
Estimated data for each field is added to each potential partner and our AI agent builds an algorithm to create a weighted score for each.



Ideal Partner HVT List

Priority	Company Name	Weighted Score	Mutual Customers	ICP TAM Accounts	Partner Influence	Partner Sales & Marketing Resources	Partner Brand Presence	Product Synergy	Potential Speed to Launch
0	TechTrend Innovations	92.5	25	5000	High	Medium	High	High	Fast
1.0	BuildSync Solutions	87.5	20	4500	Medium	High	High	High	Fast
1.1	ProCore Tech	85	22	4000	High	High	Medium	High	Medium
1.2	Nexlify Systems	82.5	18	3500	High	Medium	High	High	Fast
1.3	ConstructEdge	80	15	3000	Medium	High	Medium	High	Fast
1.4	SmartBuild Analytics	79.5	17	3200	High	Medium	High	High	Medium
1.5	FlowTech Partners	78.5	14	2800	Medium	High	High	High	Fast
1.6	BlueRiser Consulting	76	12	2500	High	Medium	Medium	High	Fast
1.7	OptiPlan Software	75.5	16	2700	Medium	High	Medium	High	Medium
1.8	EverGrow Networks	74.5	13	2600	High	Medium	High	High	Medium

Algo



The weighted algorithm assigns scores based on the following weights, prioritizing number of mutual customers, ICP TAM accounts, and product synergy:

- Number of Mutual Customers: 30% (0-25 scale, normalized)
- ICP TAM Accounts: 30% (0-5000 scale, normalized)
- Product Synergy: 20% (High=100, Medium=50, Low=0)
- Partner Influence: 5% (High=100, Medium=50, Low=0)
- Partner Sales & Marketing Resources: 5% (High=100, Medium=50, Low=0)
- Partner Brand Presence: 5% (High=100, Medium=50, Low=0)
- Potential Speed to Launch: 5% (Fast=100, Medium=50, Slow=0)

The weighted score outcome determines our High Value Target partners. Get this example sheet & algo

Set Up Your ELG Tech Stack

CRM

salesforce

Centralizes partner accounts, prospects, leads and reports.

REQUIRED

PRM

CROSSBEAM

Identifies overlapping customers and prospects so you can collaborate on opportunities with partners.

REQUIRED

Outreach

Outreach

Streamlines outreach efforts through customized sequences.

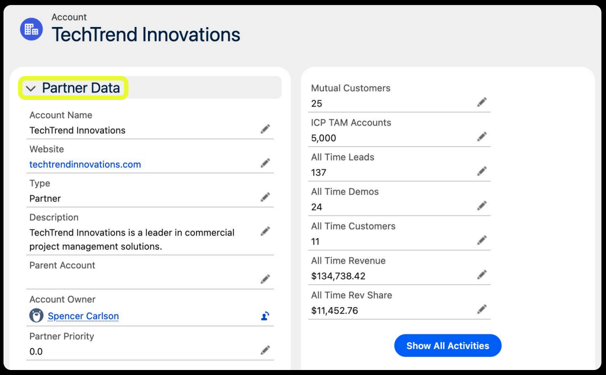
Internal Tools

Enrich accounts and build automated workflows with clay, keep everything organized with Google Drive and share partner strategies and details company-wide with Notion.

External Tools

Create a #partnerships channel and partner-specific channels to collaborate on deals and share wins with slack. Set up no-code integrations to boost lead volume with zapier.

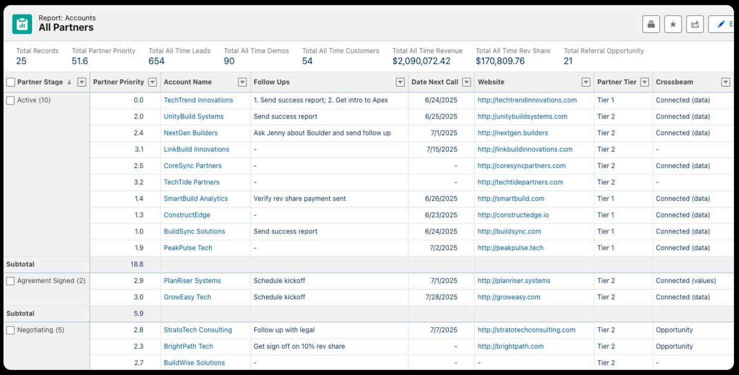
CRM Setup



Account
TechTrend Innovations

Account Name	TechTrend Innovations
Website	techtrendinnovations.com
Type	Partner
Description	TechTrend Innovations is a leader in commercial project management solutions.
Parent Account	
Account Owner	Spencer Carlson
Partner Priority	0.0
Mutual Customers	25
ICP TAM Accounts	5,000
All Time Leads	137
All Time Demos	24
All Time Customers	11
All Time Revenue	$134,738.42
All Time Rev Share	$11,452.76

Add a "Partner Data" tab and custom fields for partners data

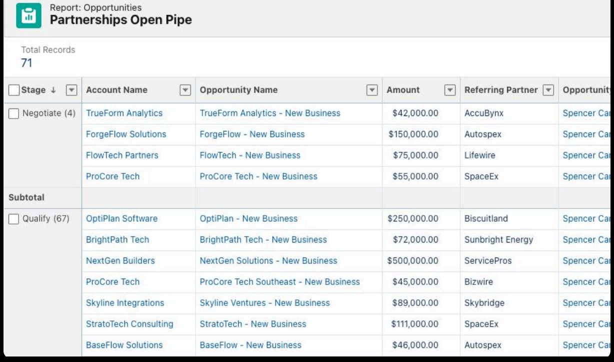


Report: Accounts
All Partners

Total Records	Total Partner Priority	Total All Time Leads	Total All Time Demos	Total All Time Customers	Total All Time Revenue	Total All Time Rev Share	Total Referral Opportunity
25	51.6	654	90	54	$2,090,072.42	$170,809.76	21

Partner Stage ↓	Partner Priority	Account Name	Follow Ups	Date Next Call	Website	Partner Tier	Crossbeam
☐ Active (10)	0.0	TechTrend Innovations	1. Send success report; 2. Get intro to Apex	6/24/2025	http://techtrendinnovations.com	Tier 1	Connected (data)
	2.0	UnityBuild Systems	Send success report	6/25/2025	http://unitybuildsystems.com	Tier 2	Connected (data)
	2.4	NextGen Builders	Ask Jenny about Boulder and send follow up	7/1/2025	http://nextgen.builders	Tier 2	Connected (data)
	3.1	LinkBuild Innovations	-	7/15/2025	http://linkbuildinnovations.com	Tier 2	-
	2.5	CoreSync Partners	-	-	http://coresyncpartners.com	Tier 2	Connected (data)
	3.2	TechTide Partners	-	-	http://techtidepartners.com	Tier 2	-
	1.4	SmartBuild Analytics	Verify rev share payment sent	6/26/2025	http://smartbuild.com	Tier 1	Connected (data)
	1.3	ConstructEdge	-	6/23/2025	http://constructedge.io	Tier 1	Connected (data)
	1.0	BuildSync Solutions	Send success report	6/24/2025	http://buildsync.com	Tier 1	Connected (data)
	1.9	PeakPulse Tech	-	7/2/2025	http://peakpulse.tech	Tier 1	Connected (data)
Subtotal	18.8						
☐ Agreement Signed (2)	2.9	PlanRiser Systems	Schedule kickoff	7/1/2025	http://planriser.systems	Tier 2	Connected (values)
	3.0	GrowEasy Tech	Schedule kickoff	7/28/2025	http://groweasy.com	Tier 2	Connected (data)
Subtotal	5.9						
☐ Negotiating (5)	2.8	StratoTech Consulting	Follow up with legal	7/7/2025	http://stratotechconsulting.com	Tier 2	Opportunity
	2.3	BrightPath Tech	Get sign off on 10% rev share	-	http://brightpath.com	Tier 2	Opportunity
	2.7	BuildWise Solutions	-	-	-	Tier 2	-

Create an All Partners report to optimize your daily efforts

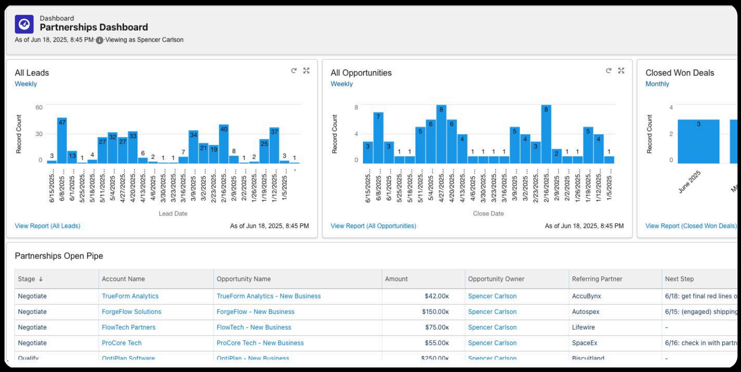


Report: Opportunities
Partnerships Open Pipe

Total Records
71

Stage ↓	Account Name	Opportunity Name	Amount	Referring Partner	Opportunit
☐ Negotiate (4)	TrueForm Analytics	TrueForm Analytics - New Business	$42,000.00	AccuBynx	Spencer Ca
	ForgeFlow Solutions	ForgeFlow - New Business	$150,000.00	Autospex	Spencer Ca
	FlowTech Partners	FlowTech - New Business	$75,000.00	Lifewire	Spencer Ca
	ProCore Tech	ProCore Tech - New Business	$55,000.00	SpaceEx	Spencer Ca
Subtotal					
☐ Qualify (67)	OptiPlan Software	OptiPlan - New Business	$250,000.00	Biscuitland	Spencer Ca
	BrightPath Tech	BrightPath Tech - New Business	$72,000.00	Sunbright Energy	Spencer Ca
	NextGen Builders	NextGen Solutions - New Business	$500,000.00	ServicePros	Spencer Ca
	ProCore Tech	ProCore Tech Southeast - New Business	$45,000.00	Bizwire	Spencer Ca
	Skyline Integrations	Skyline Ventures - New Business	$89,000.00	Skybridge	Spencer Ca
	StratoTech Consulting	StratoTech - New Business	$111,000.00	SpaceEx	Spencer Ca
	BaseFlow Solutions	BaseFlow - New Business	$46,000.00	Autospex	Spencer Ca

Create a Partnerships Open Pipe report to stay on top of your best deals moving through the funnel



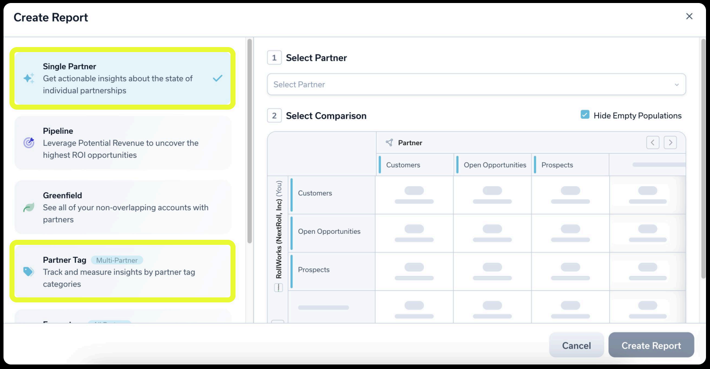
Dashboard
Partnerships Dashboard
As of Jun 18, 2025, 8:45 PM · Viewing as Spencer Carlson

Partnerships Open Pipe

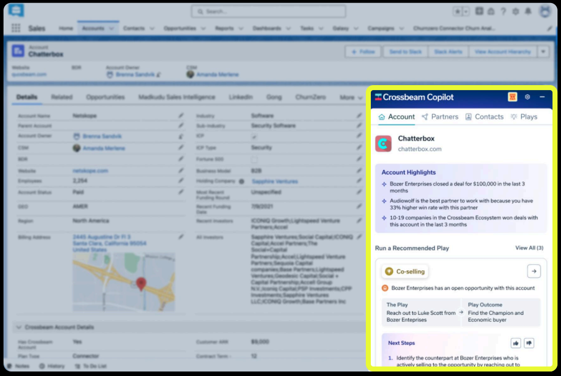
Stage ↓	Account Name	Opportunity Name	Amount	Opportunity Owner	Referring Partner	Next Step
Negotiate	TrueForm Analytics	TrueForm Analytics - New Business	$42.00K	Spencer Carlson	AccuBynx	6/18: get final red lines o
Negotiate	ForgeFlow Solutions	ForgeFlow - New Business	$150.00K	Spencer Carlson	Autospex	6/15: (engaged) shipping
Negotiate	FlowTech Partners	FlowTech - New Business	$75.00K	Spencer Carlson	Lifewire	-
Negotiate	ProCore Tech	ProCore Tech - New Business	$55.00K	Spencer Carlson	SpaceEx	6/16: check in with partn
Qualify	OptiPlan Software	OptiPlan - New Business	$250.00K	Spencer Carlson	Biscuitland	-

Create a main Partnerships Dashboard that features key metrics including weekly and monthly leads, opportunities, deals won, revenue, etc.

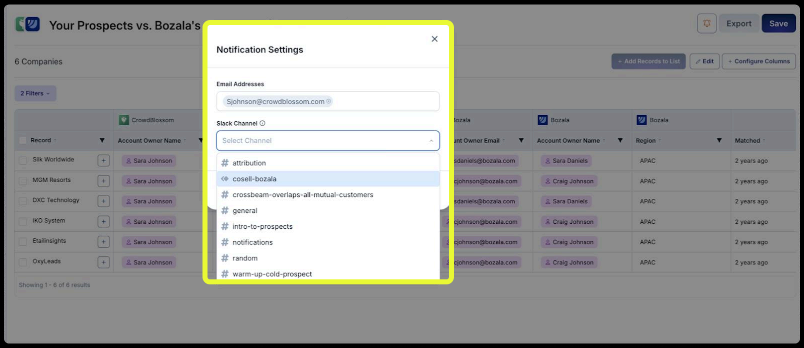
PRM Setup


Create Report
Single Partner
Get actionable insights about the state of individual partnerships
Pipeline
Leverage Potential Revenue to uncover the highest ROI opportunities
Greenfield
See all of your non-overlapping accounts with partners
Partner Tag
Multi-Partner
Track and measure insights by partner tag categories
1 Select Partner
Select Partner
2 Select Comparison
Hide Empty Populations
Partner
Customers
Open Opportunities
Prospects
Cancel
Create Report

Set up reports with each partner with alerts to reveal top opportunities for introductions and co-selling opportunities.



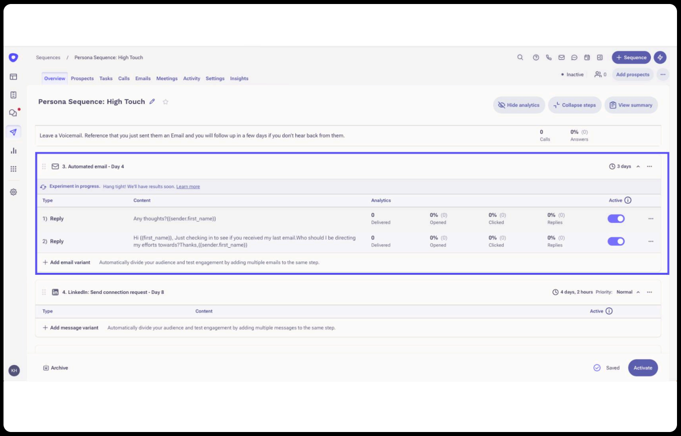
Install Crossbeam's Copilot to Salesforce to view helpful data and insights from your partners directly in your CRM.



Push helpful notifications directly into Slack

Outreach Setup

Outreach


Persona Sequence: High Touch
3. Automated email - Day 4
4. LinkedIn: Send connection request - Day 8
Archive
Activate

Set up a 10-day sequence with 3 emails and 2 LinkedIn outreaches

Day 1

Subject: Exploring Partnership Opportunities with [Your Company]

Hi [Recipient's First Name],

I'm [Your First Name], Head of Partnerships at [Your Company], where we [insert your value prop] for [insert your customer type]. [insert a specific connection/intrigue/etc. to the individual or company].

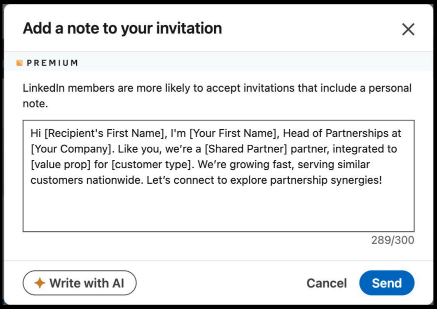
I believe there's strong potential for a partnership between [Your Company] and [Target Partner] to create value for our shared customers—perhaps by referring customers or integrating our [Your Product/Service] solutions with your platform to [insert shared value prop].

Would you be open to a quick 20-minute call next week to explore how we could collaborate? Let me know a time that works for you, or feel free to book a slot directly on my calendar: [Insert Calendar Link].

Looking forward to connecting!

Best regards, [Your Full Name] Head of Partnerships, [Your Company] [Your Email] | [Your Phone Number]

Day 3



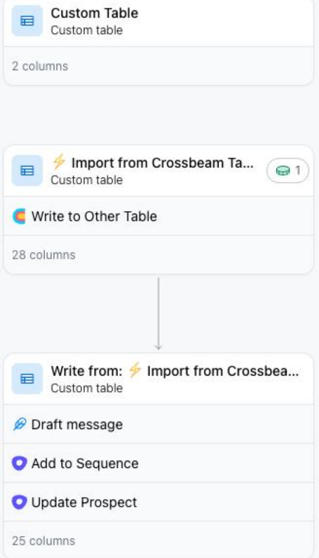
LinkedIn members are more likely to accept invitations that include a personal note.

Hi [Recipient's First Name], I'm [Your First Name], Head of Partnerships at [Your Company]. Like you, we're a [Shared Partner] partner, integrated to [value prop] for [customer type]. We're growing fast, serving similar customers nationwide. Let's connect to explore partnership synergies!

Get the full **sequence**

Clay Setup

clay



Custom Table
Custom table

2 columns

⚡ **Import from Crossbeam Ta...**
Custom table

Write to Other Table

28 columns

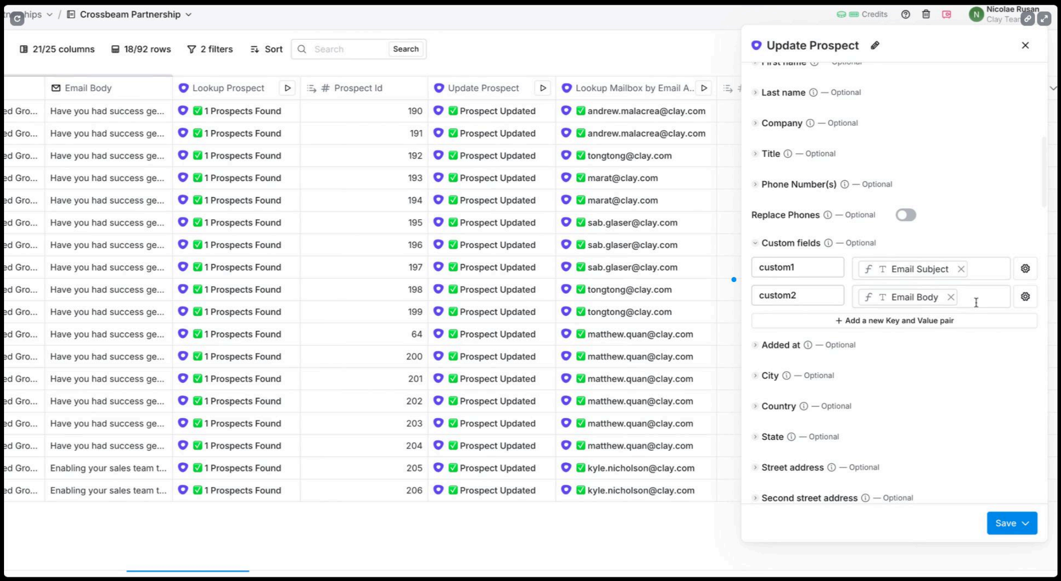
Write from: ⚡ Import from Crossbea...
Custom table

Draft message

Add to Sequence

Update Prospect

25 columns



	Email Body	Lookup Prospect	# Prospect Id	Update Prospect	Lookup Mailbox by Email A...
ed Gro...	Have you had success ge...	✓ 1 Prospects Found	190	✓ Prospect Updated	✓ andrew.malacrea@clay.com
ed Gro...	Have you had success ge...	✓ 1 Prospects Found	191	✓ Prospect Updated	✓ andrew.malacrea@clay.com
ed Gro...	Have you had success ge...	✓ 1 Prospects Found	192	✓ Prospect Updated	✓ tongtong@clay.com
ed Gro...	Have you had success ge...	✓ 1 Prospects Found	193	✓ Prospect Updated	✓ marat@clay.com
ed Gro...	Have you had success ge...	✓ 1 Prospects Found	194	✓ Prospect Updated	✓ marat@clay.com
ed Gro...	Have you had success ge...	✓ 1 Prospects Found	195	✓ Prospect Updated	✓ sab.glaser@clay.com
ed Gro...	Have you had success ge...	✓ 1 Prospects Found	196	✓ Prospect Updated	✓ sab.glaser@clay.com
ed Gro...	Have you had success ge...	✓ 1 Prospects Found	197	✓ Prospect Updated	✓ sab.glaser@clay.com
ed Gro...	Have you had success ge...	✓ 1 Prospects Found	198	✓ Prospect Updated	✓ tongtong@clay.com
ed Gro...	Have you had success ge...	✓ 1 Prospects Found	199	✓ Prospect Updated	✓ tongtong@clay.com
ed Gro...	Have you had success ge...	✓ 1 Prospects Found	64	✓ Prospect Updated	✓ matthew.quan@clay.com
ed Gro...	Have you had success ge...	✓ 1 Prospects Found	200	✓ Prospect Updated	✓ matthew.quan@clay.com
ed Gro...	Have you had success ge...	✓ 1 Prospects Found	201	✓ Prospect Updated	✓ matthew.quan@clay.com
ed Gro...	Have you had success ge...	✓ 1 Prospects Found	202	✓ Prospect Updated	✓ matthew.quan@clay.com
ed Gro...	Have you had success ge...	✓ 1 Prospects Found	203	✓ Prospect Updated	✓ matthew.quan@clay.com
ed Gro...	Have you had success ge...	✓ 1 Prospects Found	204	✓ Prospect Updated	✓ matthew.quan@clay.com
ed Gro...	Enabling your sales team t...	✓ 1 Prospects Found	205	✓ Prospect Updated	✓ kyle.nicholson@clay.com
ed Gro...	Enabling your sales team t...	✓ 1 Prospects Found	206	✓ Prospect Updated	✓ kyle.nicholson@clay.com

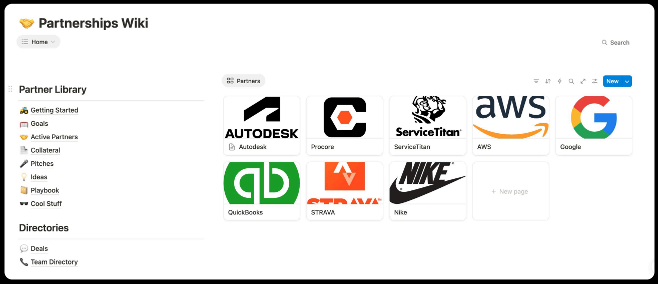
Update Prospect

Last name — Optional
Company — Optional
Title — Optional
Phone Number(s) — Optional
Replace Phones — Optional
Custom fields — Optional
custom1 — Email Subject
custom2 — Email Body
+ Add a new Key and Value pair
Added at — Optional
City — Optional
Country — Optional
State — Optional
Street address — Optional
Second street address — Optional

Automate outreach to the best prospects with the strongest signals leveraging partner, firmographic and intent data.

Notion Setup

Notion



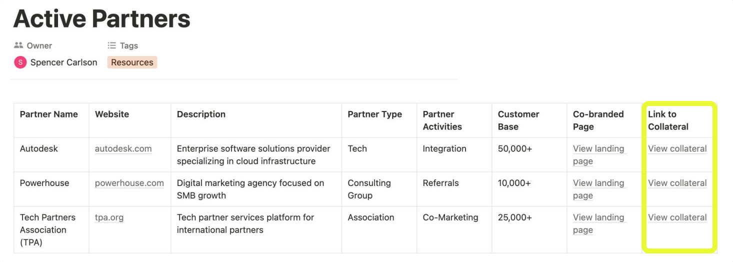
Partnerships Wiki

Partner Library
- Getting Started
- Goals
- Active Partners
- Collateral
- Pitches
- Ideas
- Playbook
- Cool Stuff

Directories
- Deals
- Team Directory

Autodesk
Procore
ServiceTitan
AWS
Google
QuickBooks
STRAVA
Nike

Create a Partnerships Wiki page to be a source of truth for internal teams

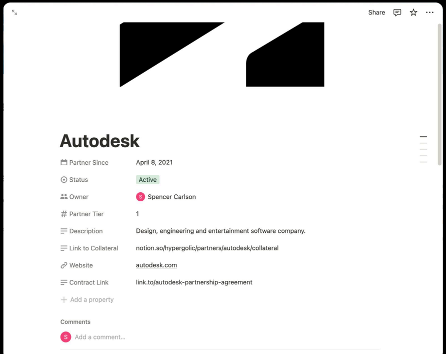


Active Partners

Owner: Spencer Carlson
Tags: Resources

Partner Name	Website	Description	Partner Type	Partner Activities	Customer Base	Co-branded Page	Link to Collateral
Autodesk	autodesk.com	Enterprise software solutions provider specializing in cloud infrastructure	Tech	Integration	50,000+	View landing page	View collateral
Powerhouse	powerhouse.com	Digital marketing agency focused on SMB growth	Consulting Group	Referrals	10,000+	View landing page	View collateral
Tech Partners Association (TPA)	tpa.org	Tech partner services platform for international partners	Association	Co-Marketing	25,000+	View landing page	View collateral

Outline active partners and important, high-level information for internal teams, including quick links to view partner-specific collateral



Autodesk

Partner Since	April 8, 2021
Status	Active
Owner	Spencer Carlson
Partner Tier	1
Description	Design, engineering and entertainment software company.
Link to Collateral	notion.so/hypergolic/partners/autodesk/collateral
Website	autodesk.com
Contract Link	link.to/autodesk-partnership-agreement

Add a few important details for each active partner on a dedicated page

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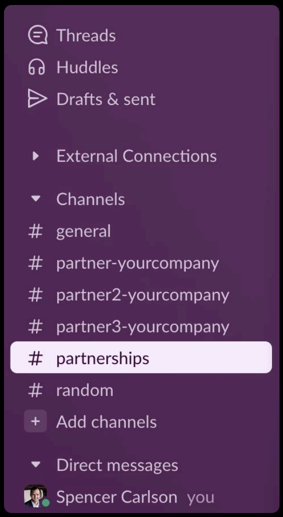
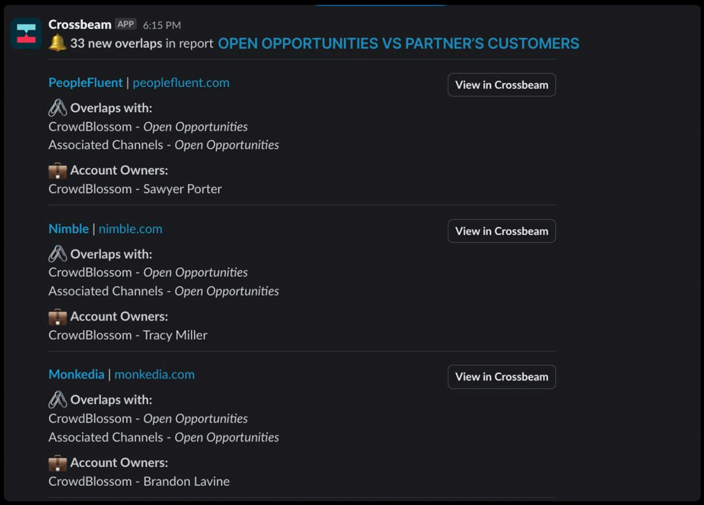
Slack Setup



Set up a #partnerships channel for all primary comms to share with a broader team.

Set up a new channel for each partner to collaborate on deals



Crossbeam APP 6:15 PM
🔔 33 new overlaps in report OPEN OPPORTUNITIES VS PARTNER'S CUSTOMERS

PeopleFluent | peoplefluent.com
Overlaps with:
CrowdBlossom - *Open Opportunities*
Associated Channels - *Open Opportunities*
Account Owners:
CrowdBlossom - Sawyer Porter

Nimble | nimble.com
Overlaps with:
CrowdBlossom - *Open Opportunities*
Associated Channels - *Open Opportunities*
Account Owners:
CrowdBlossom - Tracy Miller

Monkedia | monkedia.com
Overlaps with:
CrowdBlossom - *Open Opportunities*
Associated Channels - *Open Opportunities*
Account Owners:
CrowdBlossom - Brandon Lavine

Set up Crossbeam notifications to specific channels so you're aware of new opportunities to collaborate with your partners on

---

Zapier Setup

Create a few simple zaps to celebrate wins, communicate success and notify reps with timely lead data.

New Partners Signed

Celebrate early wins when new partners are coming on board.

New Lead Notifications

Sourced from Crossbeam and high-intent actions (i.e. partner referrals, in-app zaps, form fills, etc.), notify reps immediately with pertinent information.

New Business Won

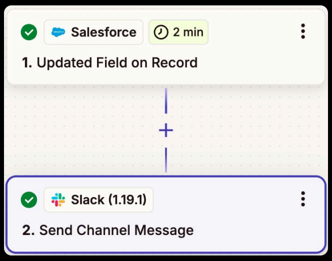
Make sure the organization is aware when partner-sourced new business has been won!

Over time you'll likely set up **dozens of zaps** to increase the efficiency of the channel.

The goal is always the same: get the **right information** to the **right people** at the **right time** so they can make an **informed decision**.

Example Zap

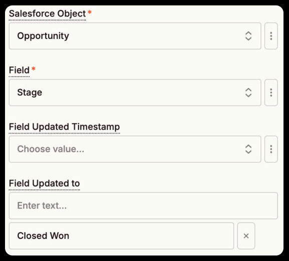
Send a slack message when a partner-sourced deal is won



Salesforce 2 min
1. Updated Field on Record

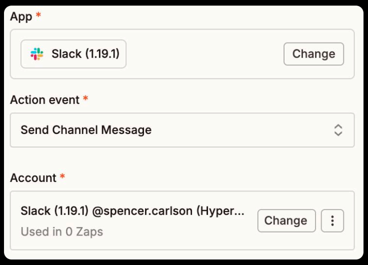
Slack (1.19.1)
2. Send Channel Message

Use the Zapier Copilot to build your 2-step zap



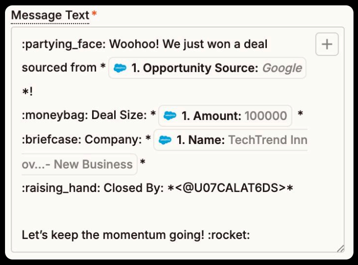
Salesforce Object *: Opportunity
Field *: Stage
Field Updated Timestamp: Choose value...
Field Updated to: Enter text...
Closed Won

Select the proper fields to trigger the zap



App *: Slack (1.19.1)
Action event *: Send Channel Message
Account *: Slack (1.19.1) @spencer.carlson (Hyper...
Used in 0 Zaps

Select the slack channel to send the message

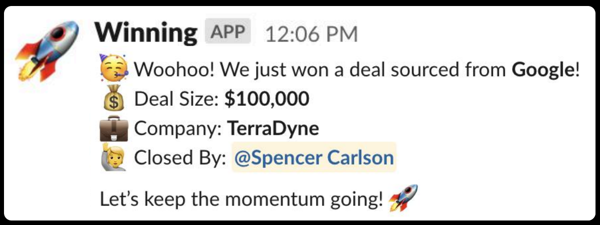


Message Text *

:partying_face: Woohoo! We just won a deal
sourced from * 1. Opportunity Source: *Google*
*!
:moneybag: Deal Size: * 1. Amount: 100000 *
:briefcase: Company: * 1. Name: TechTrend Inn
ov...- New Business *
:raising_hand: Closed By: *<@U07CALAT6DS>*

Let's keep the momentum going! :rocket:

Use AI to generate a celebratory message to share with the company



Winning APP 12:06 PM
🥳 Woohoo! We just won a deal sourced from **Google**!
💰 Deal Size: **$100,000**
💼 Company: **TerraDyne**
🙋 Closed By: @Spencer Carlson

Let's keep the momentum going! 🚀

Test the zap and celebrate wins with the company to keep that momentum up

Effective & Efficient Outreach

Target the right individuals at HVTs for discovery meetings:

- **LinkedIn:** If you have a partnerships professional, LinkedIn's algorithm highlights relevant contacts.
- **ZoomInfo/Clay:** Enrich CRM data and gain more insights on target contacts.
- **Outreach:** Use sequences (emails + LinkedIn touches) to secure meetings 70% of the time. Focus on 20-50 partners initially.

Identify

Using LinkedIn and ZoomInfo, clearly identify the best individuals to get in touch with.

Enrich

Push contact information directly into your CRM with ZoomInfo and Clay integrations.

Connect

Use proven email + LinkedIn sequences that get meetings on the books in days, not weeks.

Negotiate Win-Win-Win Deals

Aim for a win-win-win outcome (your company, partner, customer). Balance openness with strategic positioning (i.e. integrations, exclusivity).

Key Principles

- **Build trust and rapport** with diverse partner stakeholders (sales, marketing, technical).
- **Keep agreements flexible** but clear on mutual obligations.
- **Outline initial activities** in an exhibit (i.e. co-branded landing pages, webinars, referrals, integrations).

Negotiation Tips

- **Use your agreement template** when possible, but adapt to larger partners' processes.
- **Maintain weekly check-ins** to keep momentum through signing and launch.
- **Prioritize relationship-building** over contract specifics.

Launch with Momentum

We call it “Momo” – Execute agreed activities with a specific launch date, involving product, marketing and sales.

Minimum launch elements:

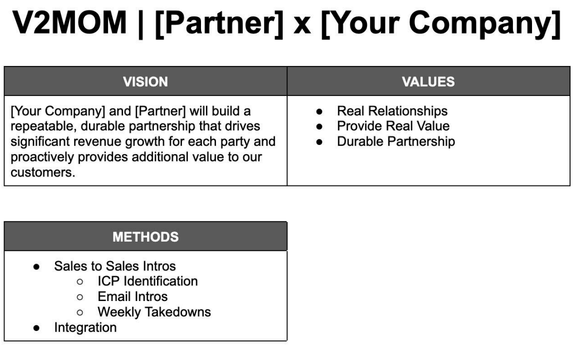
- **Email:** Get the largest reach with a co-branded email with a better together story is sent to each partner’s newsletter subscribers.
- **Social:** Make sure the world is aware (and, drive FOMO and awareness to other partners and potential investors) with LinkedIn promotion with employee engagement.
- **Referrals:** Get a commitment to get a specific number of initial referrals to generate quick wins.

Optional

Launch a no-code integration, banner or case study. Use Slack for frequent updates, celebrate wins and hold weekly “takedown” meetings using the V2MOM framework (Vision, Value, Methods, Obstacles and Measures).

[template] V2MOM

Hold weekly takedown meetings to review specific deals, identify opportunities for improvement and track progress towards shared goals.

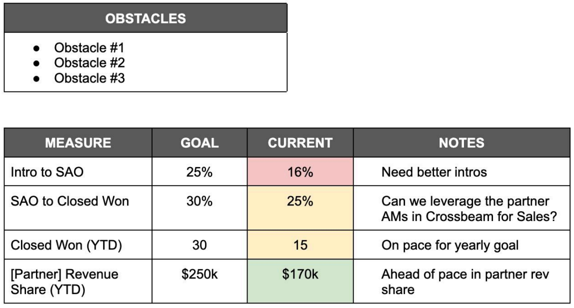


V2MOM | [Partner] x [Your Company]

VISION	VALUES
[Your Company] and [Partner] will build a repeatable, durable partnership that drives significant revenue growth for each party and proactively provides additional value to our customers.	• Real Relationships • Provide Real Value • Durable Partnership

METHODS

- Sales to Sales Intros
  - ICP Identification
  - Email Intros
  - Weekly Takedowns
- Integration



OBSTACLES
Obstacle #1 Obstacle #2 Obstacle #3

MEASURE	GOAL	CURRENT	NOTES
Intro to SAO	25%	16%	Need better intros
SAO to Closed Won	30%	25%	Can we leverage the partner AMs in Crossbeam for Sales?
Closed Won (YTD)	30	15	On pace for yearly goal
[Partner] Revenue Share (YTD)	$250k	$170k	Ahead of pace in partner rev share

Get the **template**

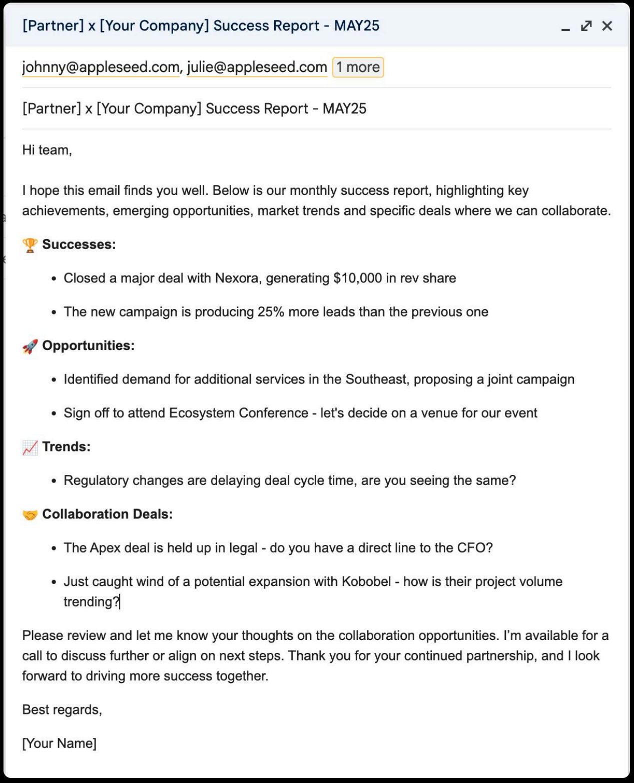
Lead with Consistent Reporting

Generate trust and keep the partnership moving forward by sending monthly success reports (via your CRM/Google Sheets) to partners, including:

- **Lifetime and Monthly Metrics:** Leads, conversions, customers, revenue, revenue share.
- **3-Month Trends:** Point out positive trends and highlight opportunities for improvement.
- **Summary Email:** Type out a short but thoughtful interpretation of the current status of the partnership.
- **Insights and Suggestions**: This is the perfect time to share recent wins and suggest improvements and submit data-driven requests to continually improve upon the partnership.

This builds trust, identifies opportunities and maintains momentum.

[template] Monthly Success Reports



[Partner] x [Your Company] Success Report - MAY25

johnny@appleseed.com, julie@appleseed.com 1 more

[Partner] x [Your Company] Success Report - MAY25

Hi team,

I hope this email finds you well. Below is our monthly success report, highlighting key achievements, emerging opportunities, market trends and specific deals where we can collaborate.

🏆 **Successes:**

- Closed a major deal with Nexora, generating $10,000 in rev share
- The new campaign is producing 25% more leads than the previous one

🚀 **Opportunities:**

- Identified demand for additional services in the Southeast, proposing a joint campaign
- Sign off to attend Ecosystem Conference - let's decide on a venue for our event

📈 **Trends:**

- Regulatory changes are delaying deal cycle time, are you seeing the same?

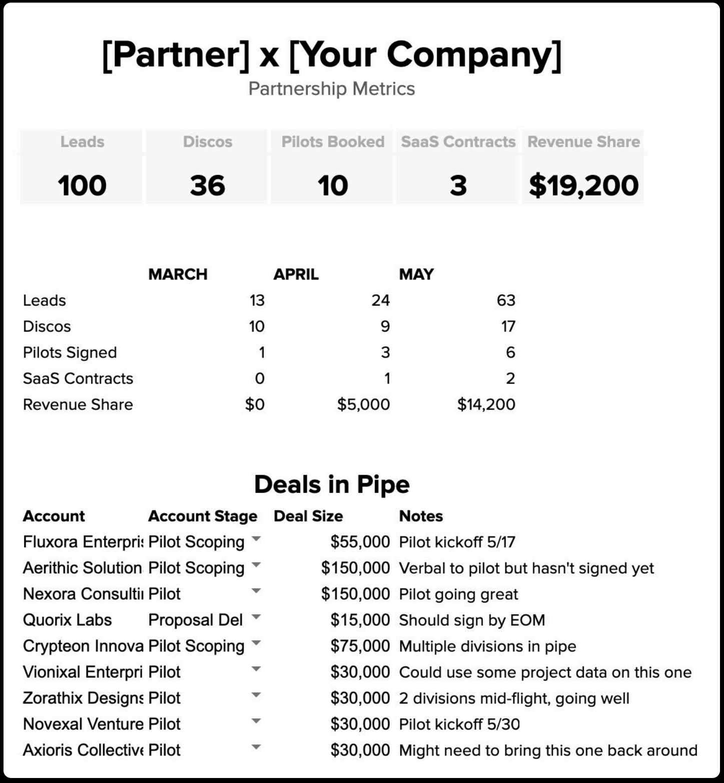
🤝 **Collaboration Deals:**

- The Apex deal is held up in legal - do you have a direct line to the CFO?
- Just caught wind of a potential expansion with Kobobel - how is their project volume trending?

Please review and let me know your thoughts on the collaboration opportunities. I'm available for a call to discuss further or align on next steps. Thank you for your continued partnership, and I look forward to driving more success together.

Best regards,

[Your Name]



[Partner] x [Your Company]

Partnership Metrics

Leads	Discos	Pilots Booked	SaaS Contracts	Revenue Share
100	36	10	3	$19,200

	MARCH	APRIL	MAY
Leads	13	24	63
Discos	10	9	17
Pilots Signed	1	3	6
SaaS Contracts	0	1	2
Revenue Share	$0	$5,000	$14,200

Deals in Pipe

Account	Account Stage	Deal Size	Notes
Fluxora Enterpri	Pilot Scoping	$55,000	Pilot kickoff 5/17
Aerithic Solution	Pilot Scoping	$150,000	Verbal to pilot but hasn't signed yet
Nexora Consulti	Pilot	$150,000	Pilot going great
Quorix Labs	Proposal Del	$15,000	Should sign by EOM
Crypteon Innova	Pilot Scoping	$75,000	Multiple divisions in pipe
Vionixal Enterpri	Pilot	$30,000	Could use some project data on this one
Zorathix Design	Pilot	$30,000	2 divisions mid-flight, going well
Novexal Venture	Pilot	$30,000	Pilot kickoff 5/30
Axioris Collectiv	Pilot	$30,000	Might need to bring this one back around

In the first few days of each month, send a success report to your point contact and others that should be aware of the data.

Attach a report detailing the most important metrics, trends and deals in pipe to collaborate on. **Get the template**

Expand the Partnership

After early wins, expand through:

- **More Co-Marketing:** Generate additional reach by investing in co-marketed virtual meetups (our version of a webinar) and in-person events.
- **Enhanced Enablement:** Meet directly with sales and success teams.
- **No-Code or API Integrations:** Launch a Zap to drive 9x more leads or an API integration to support existing customers.

The Zap

Trigger

User action in partner's platform (i.e. task creation with "equipment" keyword).

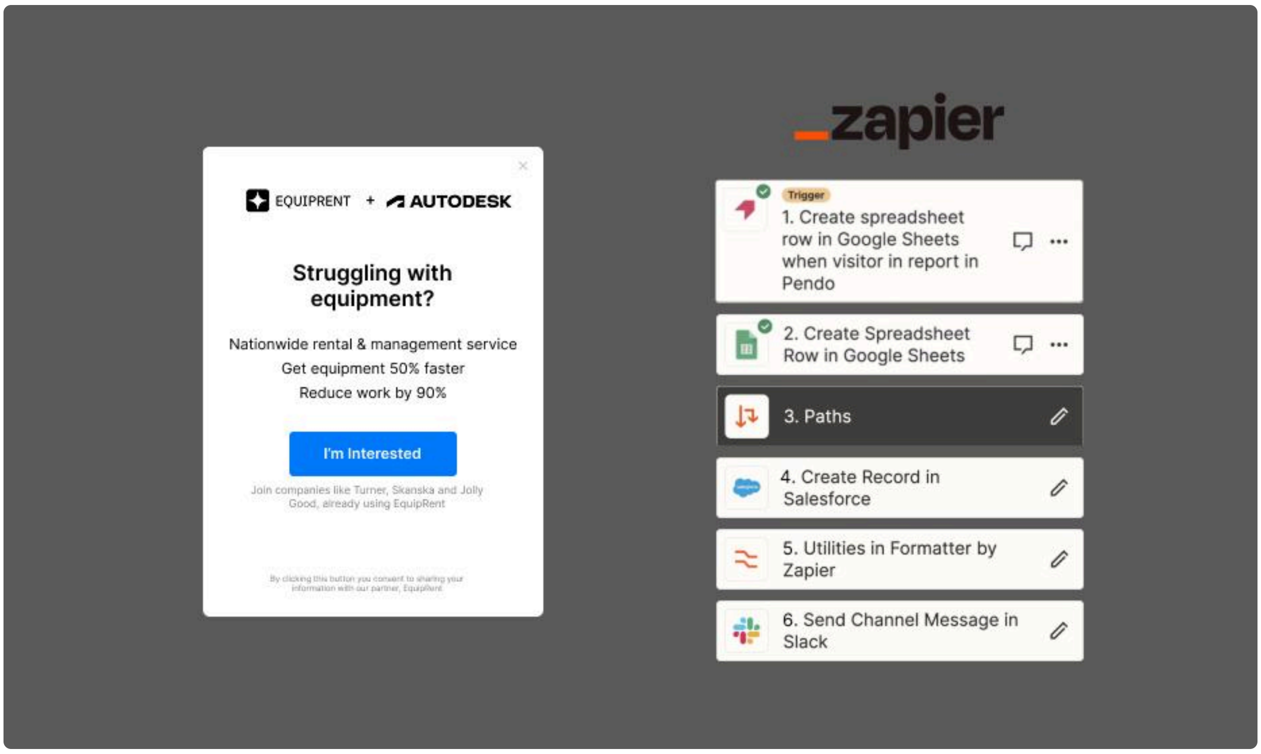
Action

Pendo pop-up offers your solution (i.e. "Struggling with equipment? Try EquipRent!").

Outcome

Zapier captures lead data, sends it to your CRM and notifies sales via Slack – **9x lead volume**.

Zap Example



Struggling with equipment?

Nationwide rental & management service
Get equipment 50% faster
Reduce work by 90%

Join companies like Turner, Skanska and Jolly Good, already using EquipRent

By clicking this button you consent to sharing your information with our partner, EquipRent

1. Create spreadsheet row in Google Sheets when visitor in report in Pendo
2. Create Spreadsheet Row in Google Sheets
3. Paths
4. Create Record in Salesforce
5. Utilities in Formatter by Zapier
6. Send Channel Message in Slack

❶ User in Autodesk creates a task with keyword “equipment”

❷ Prompt is shown to user, they click “I’m Interested”

❸ Zapier grabs contact info and creates a lead

❹ Sales Rep is notified of the lead in Slack

Build Your Partnerships Success Story

Ready to take your partnerships to the next level? I’m here to help with tailored solutions that drive results.

Part-Time Consulting

Strategic analysis, setup and guidance to grow and manage your partnerships.

Workshops

Interactive sessions to empower your team with the partnerships expertise to succeed.

Coaching

Personalized support to unlock your full potential as a partnerships leader.

Partnerships, powered by real experience.
hello@gohypergolic.com

Work with me