

# PARTNER & ECOSYSTEM GROWTH PLAYBOOK

*Build a Partner Motion That Generates 10–30% of Your Pipeline*

**5**

Partner Tiers

**6**

Core Playbooks

**30%**

Pipeline Target

Covers: Partner Tiering • Co-Sell Frameworks • Crossbeam & PartnerStack • Joint Webinar Playbook • Salesforce ISV Ecosystem

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# 01 / EXECUTIVE SUMMARY

## Why Partner-Led Growth Wins

### The Partner-Led Growth Imperative

In today's high-CAC environment, direct-only GTM is increasingly expensive. Partners—technology alliances, solution integrators, and ecosystem resellers—offer a force multiplier: they extend your reach into accounts you'd never find solo, compress sales cycles by 20–40%, and often carry higher win rates because they bring pre-existing trust.

This playbook gives your team everything needed to build a partner motion that contributes 10–30% of total pipeline within 12 months, without a large headcount investment.

#### BENCHMARK DATA

Companies with mature partner programs grow revenue 2x faster and achieve 33% higher profitability than those without. Partner-sourced revenue typically carries a 15–25% higher NRR due to deeper customer integration.

### What This Playbook Covers

This document is organized into six executable modules:

- Partner Tier Structure & Incentives — how to segment, recruit, and reward partners
- Co-Sell Motion Templates — joint account planning, deal registration, and AE-to-partner handoffs
- Crossbeam & PartnerStack Setup — account mapping, overlap discovery, and revenue tracking
- Joint Webinar Playbook — demand generation via partner co-marketing
- Salesforce ISV Ecosystem — AppExchange listing, co-sell through Salesforce AEs
- Pipeline Metrics & QBRs — how to measure and optimize the program

### The 12-Month Partner Pipeline Ramp

Phase	Timeline	Focus	Pipeline Target
Foundation	Month 1–2	Tier setup, tooling, first 5 partners	0–3% of pipeline
Activation	Month 3–5	Co-sell motions, first joint deals	3–10% of pipeline
Scale	Month 6–9	Webinars, Crossbeam overlap, ISV	10–20% of pipeline
Optimization	Month 10–12	QBRs, tier promotions, new verticals	20–30% of pipeline

# 02 / PARTNER TIER STRUCTURE

## Partner Program Design & Incentive Model

### Partner Type Taxonomy

Before designing tiers, align on the three distinct partner types that require different motions, tooling, and incentives:

Partner Type	Who They Are	Primary Motion	Revenue Model
<b>Technology / ISV</b>	SaaS platforms that integrate with your product (e.g., Salesforce, HubSpot, Slack)	Co-sell, integration bundling	Referral fee, rev-share
<b>Services / SI</b>	Implementation partners, agencies, consultancies that deploy your product	Influence, co-deliver	Implementation margin
<b>Referral / Affiliate</b>	Individuals or companies with audience access (advisors, media, community builders)	Lead passing	One-time referral bonus
<b>Reseller / VAR</b>	Companies that buy and resell your product, typically with regional or vertical focus	Transact, own customer	Discount + margin

### The Four-Tier Partner Architecture

Structure your program around four tiers that reflect both the partner's investment in your ecosystem and the mutual business value generated. Each tier unlocks incremental benefits.

#### TIER 1: REGISTERED

Entry-level partner who has completed onboarding but has not yet transacted.

Requirements: Signed partner agreement, completed onboarding (2 hrs), 1 demo certification

Benefits: Deal registration portal access, co-marketing toolkit, partner badge, 10% referral fee

#### TIER 2: SILVER

Active partner with proven pipeline contribution and customer success track record.

Requirements: 2+ closed deals or \$50K influenced ARR in trailing 12 months, 1 certified practitioner

Benefits: 15% referral fee, dedicated partner success manager (shared), co-branded case study, quarterly pipeline review, MDF eligibility (\$2K/quarter)

#### TIER 3: GOLD

Strategic partner with dedicated GTM alignment, joint business plan, and mutual revenue targets.

Requirements: 5+ closed deals or \$200K influenced ARR TTM, 2 certified practitioners, joint business plan

Benefits: 20% referral fee, dedicated PSM (dedicated), joint GTM budget (\$5K/quarter MDF), co-sell

support from AEs, executive sponsor program, listing on partner directory, conference speaking slots

**TIER 4: PLATINUM (STRATEGIC)**

Elite partners with deep product integration, joint solution development, and board-level relationship. Invitation only.

Requirements: \$500K+ influenced ARR TTM, joint solution/integration, executive alignment, annual business plan review

Benefits: 25% referral fee + accelerator, \$15K/quarter MDF, co-sell team alignment, product roadmap input, joint press release & analyst briefings, premier conference tier, dedicated Slack channel with your exec team

**Market Development Fund (MDF) Policy**

MDF is the capital you invest in partner-driven demand generation. Treat it like a performance marketing budget—require co-investment, defined activities, and measurable outcomes.

Tier	Quarterly MDF	Match Requirement	Approved Activities
Silver	Up to \$2,000	1:1 co-invest	Webinars, content syndication, local events
Gold	Up to \$5,000	1:1 co-invest	Above + paid social, field events, video production
Platinum	Up to \$15,000	Negotiable	All activities + analyst reports, conference sponsorship, SDR capacity

**MDF PROCESS**

MDF Claim Process: (1) Partner submits activity plan 30 days prior. (2) Partner Success Manager approves within 5 business days. (3) Partner executes activity and submits proof of performance (screenshots, attendance lists, pipeline created). (4) Reimbursement issued within 30 days.

# 03 / CO-SELL MOTION

Templates, Frameworks & Playbooks

## The Co-Sell Operating Model

Co-selling is a joint sales motion where your AE and a partner seller actively work a deal together. It differs from referral (partner passes lead and disengages) and resell (partner owns the deal). In a co-sell motion, both parties are on customer calls, sharing intelligence, and closing together.

### CO-SELL BENCHMARK

Co-sell deals close 28% faster on average and carry a 19% higher ACV than direct deals. The key driver is pre-existing trust: the partner vouches for your product within a relationship they already own.

## Deal Registration Framework

Deal registration protects partners from channel conflict and gives your AE team visibility into partner-sourced opportunities. Enforce it consistently or partners will stop sourcing deals.

### Registration Rules

- Partners must register deals within 14 days of first customer conversation
- Registration grants deal protection for 90 days (renewable if active engagement evidence provided)
- Only one partner may hold deal registration per opportunity at a time
- Conflicts are resolved by Partner Success Manager within 3 business days
- AEs may not register deals on behalf of partners

### Deal Registration Intake Form Fields

Field	Required?	Notes
Account name + domain	Yes	Used for dedup in CRM
Primary contact (name, title, email)	Yes	Economic buyer preferred
Estimated ARR	Yes	Minimum \$5K to qualify
Estimated close date	Yes	Must be within 6 months
Partner involvement type	Yes	Referral / Co-sell / Resell
Use case / business problem	Yes	2–3 sentences minimum
Competing vendors	Optional	Informs co-sell strategy

## Joint Account Planning Template

Joint Account Planning (JAP) sessions should be run quarterly with Silver+ partners. Use this template to structure a 60-minute working session.

<b>0–10 min</b>	<b>ALIGN ON GOALS</b> Review metrics from last quarter (deals sourced, pipeline influenced, closed ARR). Agree on targets for this quarter: # of new accounts to target, # of co-sell intros to make.
<b>10–25 min</b>	<b>ACCOUNT MAPPING</b> Review Crossbeam overlap report (see Section 04). Identify: (1) your open opps where partner has a relationship, (2) partner's accounts where you have no presence, (3) shared customers for expansion plays.
<b>25–45 min</b>	<b>DEAL REVIEW</b> For each active deal: (1) What's the customer's decision process? (2) What role will partner play in next step? (3) What objections have surfaced, and how can the other party help? Agree on a specific next action for each deal.
<b>45–60 min</b>	<b>ACTION ITEMS &amp; COMMITMENTS</b> Document: (1) each partner's top 3 accounts to pursue together, (2) intro emails to send within 48 hours, (3) any MDF activities to plan, (4) date of next session. Send summary via email within 24 hours.

## Co-Sell Email Templates

### Template A: AE → Partner (Warm Introduction Request)

**Subject: Quick intro request — [Account Name]**

Hi [Partner Name],

I see in Crossbeam that you have an active relationship at [Account Name] — we're currently in an evaluation there and I want to make sure we're aligned.

A bit of context on our deal:

- Champion: [Name], [Title]
- Use case: [One sentence on what they're trying to solve]
- Stage: [Current stage, e.g., 'In POC, expected close end of quarter']

Would you be willing to put in a good word or loop me in with your contact there? Happy to do the same for you in accounts where we have depth.

Thanks — [Your Name]

### Template B: Partner → Customer (Joint Solution Introduction)

**Subject: Solving [pain point] — introducing [Your Company]**

Hi [Customer Name],

Given the work we've been doing together on [relevant initiative], I wanted to introduce you to a partner of ours, [Your Company]. They solve the exact [pain point] you mentioned on our last call — and their integration with [partner product] means you can get value without a lengthy implementation.

I've asked [AE Name] at [Your Company] to reach out to set up a 20-minute intro. I'd recommend taking the call — I've seen them deliver real results for companies like [customer reference 1] and [customer reference 2] in your space.

Happy to join that call if helpful. — [Partner Name]

# 04 / CROSSBEAM & PARTNERSTACK

Account Mapping, Overlap Discovery & Revenue Tracking

## Why You Need Both Tools

Crossbeam handles the intelligence layer (who do we share customers with?) while PartnerStack handles the revenue layer (how do we pay partners and track performance?). They solve different problems and are complementary, not redundant.

Crossbeam — Account Intelligence	PartnerStack — Revenue Operations
Secure account mapping with partners	Deal registration and partner portal
Overlap reports: customers/prospects/targets	Referral link & attribution tracking
Privacy-safe (never shares raw CRM data)	Commission calculation & payout automation
Identifies co-sell opportunities in real time	Partner performance leaderboard & reporting
Integrates with Salesforce, HubSpot	Integrates with Stripe, Salesforce, PartnerStack API

## Crossbeam Setup Guide

### Step 1: Connect Your CRM (30 min)

Crossbeam syncs securely with your CRM — it only shares overlap data (yes/no match), never raw records.

1. In Crossbeam, go to Settings > Data Sources > Connect CRM
2. Authenticate with your Salesforce or HubSpot credentials
3. Select the objects to sync: Accounts (required), Contacts (recommended), Opportunities (for pipeline overlap)
4. Set sync frequency: daily minimum, real-time recommended for Gold/Platinum partners
5. Map fields: ensure Account Domain is populated in your CRM — this is Crossbeam's primary matching key

#### PRE-SETUP CHECK

Domain matching is critical. Before connecting, run a CRM audit: what % of your Account records have a populated website/domain field? Anything below 70% will significantly reduce match accuracy. Run a data cleanup sprint first.

### Step 2: Define Your Populations (20 min)

Populations are the segments of your CRM you share with partners. Use these four standard populations:

Population	CRM Filter	Why It Matters
Customers	Account Stage = Customer	Find accounts where you're both deployed — expansion plays
Open Pipeline	Opp Stage != Closed Won/Lost, Amount > \$0	Get partner intros for active deals

Prospects	Account Stage = Prospect/MQL, no open opp	Identify inbound from partner's customers
Target Accounts	Account tagged 'Target' or on ABM list	Prioritize partner intros for strategic accounts

### Step 3: Invite Partners & Set Sharing Rules (15 min per partner)

6. In Crossbeam, go to Partners > Invite Partner
7. Select sharing preset: use 'Selective' (not Open) — you decide which populations each partner can see
8. For Registered partners: share Prospects only
9. For Silver partners: share Prospects + Customers
10. For Gold/Platinum partners: share all four populations
11. Partner accepts invite and connects their CRM — both sides immediately see overlap counts

### Step 4: Reading the Overlap Report

Once connected, Crossbeam generates an overlap matrix. Here's how to act on it:

- Green (Customer x Customer): Both of you have the account as a customer. Schedule a joint expansion call — these are your easiest upsell opportunities.
- Yellow (Your Open Opp x Their Customer): They can accelerate your deal. Send the Template A email immediately.
- Blue (Your Prospect x Their Customer): They have a warm relationship in an account you haven't activated. Ask for an intro.
- Grey (Target x Target): Neither has a relationship — deprioritize for partner-assisted motion.

## PartnerStack Setup Guide

### Step 1: Program Configuration

12. Create your partner program in PartnerStack: Settings > Programs > Create Program
13. Set program name, description, and logo (partners see this in their dashboard)
14. Configure commission structure by tier (match your incentive model from Section 02)
15. Set cookie window: 90 days minimum (partners need attribution credit for long sales cycles)
16. Enable deal registration module: Partners > Settings > Deal Registration > Enable

### Step 2: Commission Structure Setup

Tier	Commission Type	Rate	Payout Trigger
Registered	One-time referral	10% of first-year ARR	Customer pays first invoice
Silver	One-time referral	15% of first-year ARR	Customer pays first invoice
Gold	One-time + renewal	20% year 1, 5% renewals	Invoice paid; renewal 45 days post-renewal
Platinum	One-time + renewal + accelerator	25% year 1, 8% renewals, +5% if over target	Invoice paid; accelerator paid quarterly

### Step 3: CRM Integration

17. Connect PartnerStack to Salesforce: Integrations > Salesforce > Connect
18. Map PartnerStack deal fields to Opportunity fields in Salesforce
19. Enable bi-directional sync: deal stage changes in SFDC update deal status in PartnerStack
20. Create custom field 'Partner Sourced' (checkbox) and 'Partner Name' (lookup) on Opportunity
21. Set up automated Slack/email alerts when a partner registers a deal in your territory

# 05 / JOINT WEBINAR PLAYBOOK

Co-Marketing Demand Generation with Partners

## Why Joint Webinars Work

Joint webinars are the highest-ROI co-marketing activity for mid-market and enterprise B2B. Both parties bring their audiences, so you're effectively doubling your reach for half the effort. The shared-stage format also positions you as an integrated ecosystem rather than a standalone vendor.

### 🎯 REGISTRATION TARGET

Target benchmark: 40–60% of webinar registrants should come from the partner's list, not your own. If you're running a 'joint' webinar where your team is generating 90% of registrations, it's not a joint webinar — it's your webinar with a partner logo.

## Webinar Campaign Timeline (6-Week Execution Plan)

Week	Owner	Activities
<b>Week –6</b>	Partnership Lead	Topic selection & speaker confirmation. Choose a topic at the intersection of both products. Confirm 1–2 speakers per company (practitioner-level, not VP titles). Set registration goal and agree on list-sharing protocol.
<b>Week –5</b>	Marketing (both)	Create shared assets: landing page (hosted by primary company), email templates (3x sequence), social copy (LinkedIn, Twitter), speaker headshots/bios. Agree on UTM parameter structure for attribution.
<b>Week –4</b>	Marketing (both)	Launch registration. Send Invite #1 to both lists simultaneously. Post organic social from company and speaker accounts. Submit to partner's newsletter if applicable.
<b>Week –3</b>	Marketing (both)	Mid-campaign check: review registration count vs. goal. If below 60% of goal, activate paid amplification (LinkedIn Sponsored Content targeting ICP personas). Send Invite #2 to non-openers.
<b>Week –1</b>	Marketing (both)	Send reminder email #1 (1 week out). Confirm tech stack: Zoom Webinar or Goldcast as platform. Run tech rehearsal with all speakers. Finalize slide deck — co-branded, intro from each company.
<b>Day Of</b>	Both teams	Send day-of reminder at 9AM. Live webinar: 45 min content, 15 min Q&A. Have a dedicated chat moderator (not a speaker) from each company. Record everything — the recording is a content asset.
<b>Week +1</b>	Marketing + Sales	Send recording + resources to all registrants within 24 hours. Both AE teams reach out to attendees within 48 hours. Syndicate recording to partner content hub. Agree on MQL threshold and lead assignment rules.

## Topic Selection Framework

The best joint webinar topics sit at the intersection of both products' value propositions without being product pitches. Here are four proven topic archetypes:

Topic Archetype	Example Title	Why It Works
The Benchmark Report	"2026 State of [Industry] Operations: What 500 Teams Told Us"	Data draws registrations and earns media coverage. Both companies contribute data.
The How-To Deep Dive	"How to Build a [Specific Process] in 30 Days Using [Tool A] + [Tool B]"	Practical, bottom-of-funnel. Attendees are evaluating both tools.
The Customer Story	"How [Customer] Scaled [Metric] by 3x with [Partner A] + [Partner B]"	Social proof from a shared customer. Highest conversion of any format.
The Trend/Future of	"The Future of [Function]: Predictions for 2025 from [Company A] + [Company B]"	Positions both companies as thought leaders. Wide appeal.

## Post-Webinar Lead Handling

### MQL Definition for Joint Webinars

Agree upfront on how to classify attendees. We recommend a simple scoring model:

- Attended live (>20 min): MQL — route to AEs within 48 hours
- Registered, did not attend: Nurture sequence — 3-email track, 30-day re-engagement
- Attended, submitted a question or visited pricing page post-webinar: High-intent MQL — route within 24 hours

### Attribution & Credit-Sharing Model

- If registrant came from your list: your company receives pipeline credit in CRM
- If registrant came from partner's list: partner receives deal registration credit (if they convert to opp)
- Track source via UTM parameters on landing page: utm\_source=partner\_name, utm\_medium=webinar
- Shared registrants (on both lists): credit is split 50/50, or assigned to first touch

## 06 / SALESFORCE ISV ECOSYSTEM

AppExchange, Co-Sell & AE Activation

### Why the Salesforce Ecosystem Matters

Salesforce's AppExchange is the world's largest B2B software marketplace, with 150,000+ active customers searching for solutions. More importantly, Salesforce's 17,000+ AEs are actively looking for products to recommend to their accounts — especially products that drive Salesforce platform stickiness (more seats, more modules, more usage).

#### SALESFORCE AE MOTIVATION

Salesforce AEs are measured on platform consumption, not just license sales. Any product that increases Salesforce usage — through deeper data, automation, or user engagement — is a product they're incentivized to recommend. Position your product around Salesforce consumption, not just integration.

### AppExchange Listing Strategy

#### Tier 1: AppExchange Free Listing (Weeks 1–4)

A free AppExchange listing gives you discoverability. All native Salesforce integrations should have one. Even if you're not selling through the marketplace, the listing increases credibility during enterprise sales cycles.

22. Join Salesforce Partner Community: [partners.salesforce.com](https://partners.salesforce.com)
23. Complete ISV Agreement (free for native integrations)
24. Build or certify your Salesforce integration via Salesforce's security review (\$2,500 fee)
25. Create AppExchange listing: include 5-star-rated demo video, customer reviews (reach out to 5–10 existing customers who use Salesforce), and integration documentation
26. Optimize listing SEO: use keywords your ICP searches (e.g., 'revenue operations', 'sales automation')

#### Tier 2: Salesforce Revenue Share Program (Weeks 5–12)

For products with deeper native integration, Salesforce offers a revenue share arrangement where they actively co-sell your product. Requirements are more stringent but the pipeline impact is significant.

- Minimum requirement: 20+ mutual customers and a native (Salesforce-built) integration
- Submit via ISV Partner Program: includes a joint business plan and quarterly co-sell targets
- Your integration must pass Salesforce's Security Review (ISV Security Review process)
- Revenue share model: Salesforce earns 15–25% on deals they source; you receive preferential placement in AppExchange and access to Salesforce's AE co-sell team

#### Tier 3: Salesforce Ventures & OEM (12+ months)

For strategic partnerships, explore OEM agreements (embedding Salesforce features into your product) or Salesforce Ventures investment, which unlocks deeper co-sell privileges and access to Salesforce's enterprise deal team.

## Activating Salesforce AEs for Co-Sell

The AppExchange listing gets you found. What drives deals is activating individual Salesforce AEs in your key territories. Salesforce AEs are organized by territory (geographic or named account) — target the ones whose territory overlaps with your ICP.

### The AE Activation Sequence

#	Action	Details
1	Identify target AEs	Use LinkedIn Sales Navigator: filter by 'Salesforce' + 'Account Executive' + your target metro. Cross-reference with your mutual customer list — AEs who already have customers using your product are easiest to activate.
2	Send intro via mutual customer	Ask your mutual customer (one they manage) to intro you to their Salesforce AE. This is the warmest possible first touch. Customers who love you are incentivized to help — they benefit from their vendors working together.
3	Schedule AE briefing (30 min)	Frame it as: 'I want to show you how [Your Product] drives X% more Salesforce usage in your accounts and help you close deals faster.' Prepare a one-page leave-behind with 3 bullet points: what you do, your Salesforce integration, and two mutual customer outcomes.
4	Create a co-sell opportunity	Within 2 weeks of the briefing, share one specific account where you're in an evaluation and they may have a Salesforce relationship. Make the ask concrete: 'I'm working on [Account]. Are you in there? Would an intro help close faster?'
5	Reciprocate with referrals	The Salesforce AE relationship only deepens if you bring them deals too. When a prospect mentions they're evaluating Salesforce, or when a customer needs Salesforce services, refer them immediately. AEs remember who sends them business.
6	Monthly check-in cadence	30-min monthly pipeline review. Share a list of 5–10 accounts in their territory where you're active. Ask for the same. Use Crossbeam overlap if you've connected with Salesforce as a partner.

### Salesforce AE One-Pager Template

This leave-behind is given to Salesforce AEs at the briefing and uploaded to the Salesforce partner portal:

**[Your Company] + Salesforce: AE Quick Reference**

**WHAT WE DO (One Sentence)**

[Your Company] helps [ICP] do [outcome] by [mechanism] — natively integrated with Salesforce.

**WHY YOUR CUSTOMERS CARE**

- Outcome #1: [Specific metric, e.g., '23% faster deal cycles']
- Outcome #2: [Specific metric]
- Outcome #3: [Specific metric]

**HOW THIS HELPS YOU**

Our integration directly increases Salesforce [Sales Cloud / Service Cloud / Platform] usage by [specific mechanism]. Customers using [Your Company] + Salesforce spend X% more on Salesforce licenses within 12 months.

**MUTUAL CUSTOMERS (in your territory)**

[Customer 1], [Customer 2], [Customer 3] — all using [Your Company] + Salesforce. Happy to intro you for a reference call.

**YOUR PARTNER CONTACT**

[Partnerships Manager Name] | [email] | [mobile] — reach me any time for a co-sell opportunity.

# 07 / PIPELINE METRICS & QBRs

How to Measure and Optimize the Partner Program

## The Partner Program KPI Framework

Measure your partner program across three layers: health metrics (is the program active?), pipeline metrics (is it generating revenue?), and efficiency metrics (is it worth the investment?).

### Layer 1: Program Health Metrics

Metric	Target	How to Measure
Active Partners (transacted in 90 days)	>60% of partner base	PartnerStack: deals registered, last 90 days
Time to First Deal (new partner)	<60 days from activation	Cohort analysis in PartnerStack
Partner Portal Login Rate	>40% monthly active	PartnerStack analytics dashboard
Certifications Completed	>1 per active partner	LMS or PartnerStack training module

### Layer 2: Pipeline Metrics

Metric	Target	How to Measure
Partner-Sourced Pipeline (\$)	10–30% of total pipeline	Salesforce: filter opps by Partner Sourced = TRUE
Partner-Influenced Pipeline (\$)	Additional 15–25% of pipeline	Salesforce: Partner Name field populated on opp
Partner-Sourced Win Rate	>Direct win rate by 10%+	SFDC report: win rate by source
Partner-Sourced ACV	>= Direct ACV	SFDC report: ACV by source
Partner-Sourced Sales Cycle (days)	<Direct sales cycle	SFDC: avg days from Created to Closed Won by source

### Layer 3: Efficiency Metrics

Metric	Target	How to Measure
Partner Program ROI	>5:1 (revenue / program cost)	(Partner ARR) / (MDF + partner team cost + tooling)
Cost Per Partner-Sourced Dollar	<\$0.15 / \$1 ARR	Total partner program spend / partner-sourced ARR
Partner NPS	>50	Quarterly partner satisfaction survey (5 questions)

## Quarterly Business Review (QBR) Template

Run QBRs with Gold and Platinum partners quarterly. Silver partners get a simplified version (30 min, focused on pipeline only). The QBR should be a working session, not a presentation — both sides bring data and leave with committed actions.

- Agenda Item 1 (10 min): Scorecard review — pipeline sourced, deals closed, ARR contributed vs. target
- Agenda Item 2 (15 min): Top 10 accounts review — current status, blockers, co-sell opportunities
- Agenda Item 3 (10 min): Crossbeam overlap review — new accounts identified since last QBR
- Agenda Item 4 (10 min): Marketing review — webinars, content, MDF spend vs. pipeline generated
- Agenda Item 5 (10 min): Commitments — each side commits to 3 specific actions with owners and dates
- Agenda Item 6 (5 min): Tier review — is the partner on track for promotion or at risk of demotion?

# 08 / PARTNER ACTIVATION CHECKLIST

From Day 0 to First Co-Sell Deal

## Partner Onboarding Checklist (First 30 Days)



Use this as a shared tracking document with each new partner. Assign an owner for every item.

✓	Action Item	Owner	Due
<input type="checkbox"/>	Partner agreement signed and counter-signed	Legal / Partnerships	Day 1
<input type="checkbox"/>	Partner added to PartnerStack portal + login confirmed	Partnerships Ops	Day 2
<input type="checkbox"/>	Crossbeam connection established, populations shared	Partnerships Ops	Day 3
<input type="checkbox"/>	Partner completes 2-hr onboarding module	Partner	Day 7
<input type="checkbox"/>	Partner completes product demo certification	Partner	Day 14
<input type="checkbox"/>	Kickoff call: PSM + Partner AE + Partner Marketing	PSM	Day 7
<input type="checkbox"/>	Joint account mapping session (Crossbeam overlap review)	PSM + Partner	Day 14
<input type="checkbox"/>	First co-branded asset created (one-pager or case study)	Marketing	Day 21
<input type="checkbox"/>	First deal registered in PartnerStack	Partner	Day 30
<input type="checkbox"/>	Partner added to Slack shared channel	Partnerships	Day 3
<input type="checkbox"/>	MDF application submitted (Silver+ only)	Partner + PSM	Day 30
<input type="checkbox"/>	First joint webinar topic agreed upon (Silver+ only)	Marketing	Day 30

### 60-DAY RULE

Success Benchmark: If a partner hasn't registered their first deal within 60 days of onboarding, they need direct intervention. Have the PSM schedule an account mapping session and jointly identify 3 specific accounts to pursue together. Activation stalls when partners don't see a clear path to their first commission.

## Signals to Watch: When to Promote or Offboard a Partner

 Promote to Next Tier	 Consider Offboarding
Consistently exceeds pipeline targets 2 quarters in a row	No deal registered in 90+ days with no explanation
Has 2+ certified practitioners on staff	Partner AE team won't engage with co-sell opportunities
Proactively brings new account mapping sessions	Competitor relationship discovered without disclosure
Completed joint GTM plan and committed to targets	Customer complaints about partner delivery quality

Co-invested MDF and generated measurable pipeline

Partner NPS from your team drops below 3/5 two quarters in a row

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**Partner & Ecosystem Growth Playbook**  
Version 1.0 | For internal use | Review quarterly