



Peter Fog LLC

# Partnership Co-Selling



[www.PeterFog.com](http://www.PeterFog.com)



[peter@peterfog.com](mailto:peter@peterfog.com)



<https://www.linkedin.com/in/peterfog/>

# Why co-sell with Partners?

## An extension of your Sales team.

### Partners:

- know about needs and potential buying decisions before vendors do
- influence shortlists and buying decisions
- can be your insider, validating intel, disclosing who the 'real' mobilizers are, etc.
- can give you intel on competition
- share feedback for product roadmap
- are relationships you investing in across multiple deals over time
- are another tool in making you a trusted advisor to your customers

Partners involved deals are bigger | Hit your number faster....  
**aka Make more Money**

# Why a Co-sell model vs resell?

**Its about you!!**

**Partnership selling relationships should be closest to where the most deals are expected to happen**

**Aligning those relationships:**

- puts all the advantages of selling with Agencies in your hands personally
- supports clear communication to the Agency
- builds familiarity and trusting relationships for working together repeatedly
- incentivizes the correct teams / individuals to work collaboratively to close deals
- incentivizes reciprocating with your inbound leads, MDF, and upsell referrals

# Co-Sell Responsibilities

## Every part of team has responsibilities during a co-sell:

### Partner Mgr:

- Broker introductions and any discovery information available for the AE
- Broker introductions to other partners needed for deal
- Facilitate any escalations during pursuit
- Document in CRM the partner Relationship with target account / opportunity
- Look out and manage partner overlap, conflict, or risk areas.

### Sales team:

- do discovery, ideally directly with prospect, at a minimum with Partner
- Make partner discussion (will they need one) early in the process
- Unless explicitly informed otherwise, go after the direct customer contacts, *don't rely on Partners to do the selling*
- run everything you hear or are concerned about by Partner Mgr, sales leader, Partnership leadership, etc

# Types of Co-sell situations

**There is the ideal and then there is reality**

**There are many different situations that involve co-selling.  
Some examples are:**

1. Tech partner is pursuing same digital transformation project at same time
2. Tech partner has already won a component of the project that we are pursuing
3. Tech partner is pursuing a customer we just landed
4. Agency is pursuing the implementation work for project we are pursuing
5. Agency is hired to run evaluation and selection of project we are pursuing\*
6. Agency is an incumbent in account we are pursuing
7. Agency is proposing an entire solution and wants to include us

A close-up photograph of a metal padlock on a wooden door handle. The padlock is dark and has a diamond-shaped pattern on its side. The background is blurred, showing warm, out-of-focus lights in shades of orange and yellow against a dark blue background. The overall mood is mysterious and secure.

# Working with Partners

# Partnership Value Proposition

## Revenue Streams

[your product] Implementation

- Model and Migration
- Workflow and Publication Strategy

[ancillary work they might sell]

- Website / Mobile
- VR / AR / Voice
- Other channels

Integrations

- Backend - Direct Integrations
- Product UI - Extensions

## Become 'sticky'

Expand

- Additional Brands
- Additional countries

Maintain

- Display Layers
- Content model / inventory

Transform

- Move other LOB systems to MACH
- Move new channels to MACH



# Deal – Best Practices



## Make partner conversation part of your every discovery call:

- Will you need a partner?
- Are you currently working with a partner, (who are they?)
- Using them for this project? (qualified or just incumbent?)

## Separate yourself from the 90% of the sales reps out there:

- Typical rep mindset: *transactional* - sell license and move on
- If asking for partner introductions, it should be with *context* (deal, target, or overall territory strategy)
- Be a trusted advisor focused on outcomes for Customer, us, partner.

**Trust is earned... and assumed until you have clear evidence *against* Concerns? ...don't assume the worst, communicate, triangulate**



# Agencies – keep in mind



Agencies **aren't exclusive**, they will do legacy, custom, competing  
Many will '**play switzerland**.' Sometimes only publicly, some for real.  
We have to **earn the go-to** position  
Some will want to own the **client relationship** and just ask for pricing\*  
Regional agencies **will say they can do anything**, for anyone, anywhere  
Larger / global SI **will do anything** for anyone if project is big enough

**Partners are used to making a lot of money on the [legacy product or custom ] implementation...**

A close-up photograph of a metal padlock on a door handle. The padlock is dark and has some decorative patterns on its side. The background is blurred, showing warm, out-of-focus lights in shades of orange and yellow, suggesting an indoor setting with ambient lighting. The overall color palette is dominated by blues and purples, with the warm lights providing a contrast.

# Account Mapping Guide

# Partner – Account Mapping



**Guide to how to approach a new Partner's profile, account targeting and Go-to-market process**

Before account mapping / targeting, we need to understand *their* Profile, their business model and go-to-market strategy. Key things to discover and document:

- Industry / vertical preferences and subject matter
- Target company size
- Ideal project size (and minimum deal size if they have one)
- Other tech they work with / integrate

# Account Targeting/Mapping Preparation



The first step in targeting for a New Partner should emphasize a focused approach towards getting the First Deal. Partner Managers need to facilitate this process. Suggested approach to take is

1. review their **public portofilo** includes and pick 2-4 targets based upon where you see us targeting (subjective, but look for companies in industry we're strong in, or that is likely to spend money on digital)
2. based upon their **service areas, industry focus, and portfolio**, plan to bring 2-4 of your Target Accounts (or another AEs if you don't have enough in their GEO)

This will help keep them from wanting to do a shotgun approach AND keeps them focused on the first deal coming from their portfolio



# Account Targeting



The initial goal with a new Partner, should be to identify 1-2 accounts to focus on. Get the first win and their team fully enabled. This is a critical foundation for broader Enablement and Targeting activities. We jointly need the success story from the *First Deal* to have something 'to sell.' Then we revisit a broader targeting and possibly demand gen process.

**Note:** Partner Managers should use their judgement in the situation about what qualifies for the *First Deal milestone*. In some cases this may be an implemented project, others a closed deal, and in others it may simply be the first joint pitch. Where that line is will largely depend on your assessment of the culture and velocity of pipeline development with each Partner.