

DRIVE MORE ECOSYSTEM-LED GROWTH WITH OVERLAP ACCOUNT PLANS IN YOUR QBR

"THEY'RE DIGGING IN THE WRONG PLACE!"

LEARN HOW TO DIG IN THE RIGHT PLACE FOR DRIVING ECOSYSTEM-LED GROWTH

BOB "INDY" MOORE CEO / FOUNDER
CROSSBEAM

GARY "DR. JONES" MORRIS CEO / FOUNDER
SUCCESSFUL CHANNELS

INDIANA JONES
10TH CENTURY
TANIS, EGYPT

A COLLABORATION OF SUCCESSFUL CHANNELS PICTURES & CROSSBEAM PRODUCTIONS PRESENTS GARY MORRIS & BOB MOORE
IN AN ECOSYSTEM PRODUCTION OF INTEGRATED OVERLAP ACCOUNT ACTION PLANS WITH AN OVERLAP ACCOUNT MATRIX AND INTEGRATED JOINT PARTNERSHIP PLANS AND ONE-CLICK MBRS & QBRs

FREE BOOK OFFER FOR ALL ATTENDEES

"They're Digging in the Wrong Place."

**Indiana Jones—
Raiders of the Lost Ark**



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QBRs is the Spot where 'X' Equals Ecosystem Growth



End Customer Account Action Plan



- Identify Overlaps
- Build Account Plans
- Manage Opportunities
- Close Deals



ONE-CLICK QBR

- Instant PPT & PDF Export
- Consolidated Partner & End Customer Status
- For all partner meetings

Partner Account Action Plan



- Define Business Priorities
- Collaborate on Targets
- Build plans and Tasks
- Enable partners to succeed

**“X Never Ever Marks the Spot”
(Except with Indiana Jones and QBRs)**

Indiana Jones, The Last Crusade

Partnership & Ecosystem Glory is Realized in your QBR

End Customer Account Action Plan



Partner / Brand Overlap End Customer Mgmt.

- Map by "population"
- Identify "Brand" account owner
- Identify "Partner" account owner

Build End Customer Account Plans

- Identify Acct. sales stage
- Build account action plan
- Progress deal to next sales stage



ONE-CLICK QBR

- Instant PPT & PDF Export
- Consolidated Partner & End Customer Status
- For all partner meetings

MBR & QBR Glory 'X'

- Instant** business review
- Instant** opportunity review
- Instant** overlap account review
- Instant** task review

Partner Account Action Plan



Work-the-Plan

- Action definition
- Assign tasks
- Send Notifications
- Send reminders
- Track & report status and completion

Work-the-Plan

- Action definition
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Work-the-Plan

- Manage plan actions
- Update task status
- Resolve action barriers
- Collaborate on plan achievement

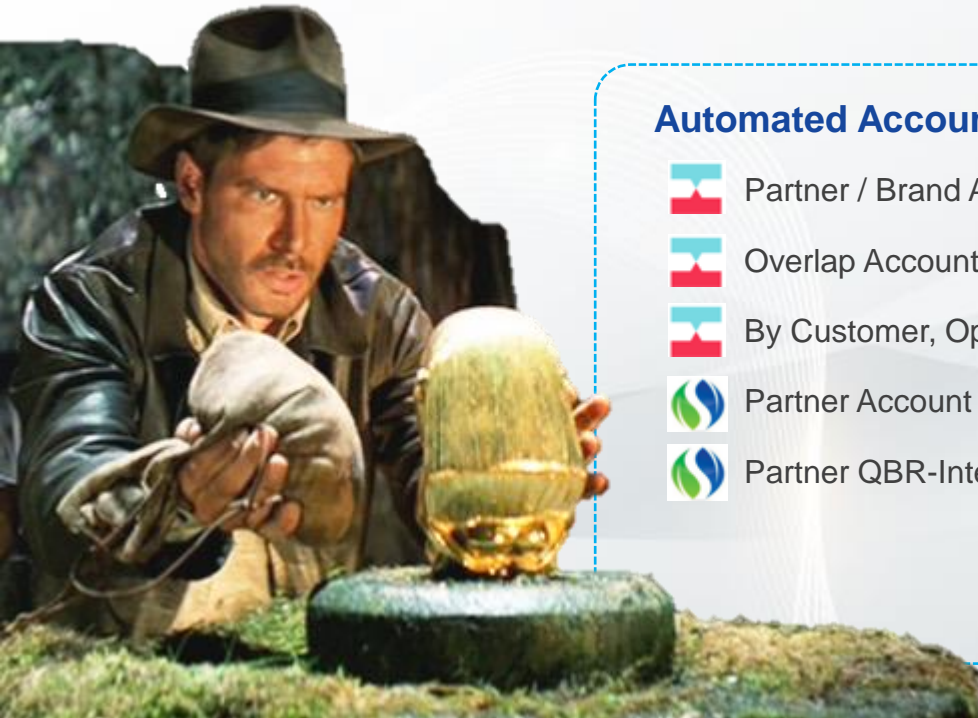
Key Plan Inputs

- Partner business priorities
- Market growth opportunities



Ecosystem Growth is Realized when QBRs Consolidate Partner & Customer Acct. Management

I find that if I sit down and think, the solution presents itself. – Professor Henry Jones



Best Practice Partnership Sales Management Solution

END CUSTOMER OVERLAP ACCOUNT MANAGEMENT

PARTNER ACCOUNT MANAGEMENT

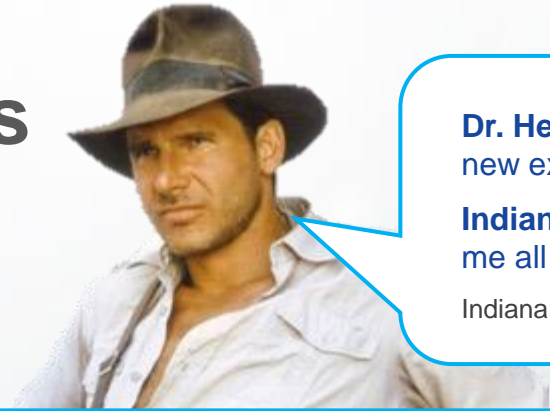
Automated Account Planning

-  Partner / Brand Account Matching
-  Overlap Account Matrix
-  By Customer, Opportunities, & Prospects
-  Partner Account Planning & Tasks
-  Partner QBR-Integrated Overlap Account Plans

Automated Joint Business Planning (JBP)

-  Partner Performance Dashboard
-  Capabilities Scorecard
-  Business Action Plan
-  Marketing Action Plan
-  Opportunity Sorting
-  Task Manager
-  Plan Acceptance & Approval

QBRs Build Committed Partnerships Partner & End Customer Accounts



Dr. Henry Jones: This is a new experience for me.

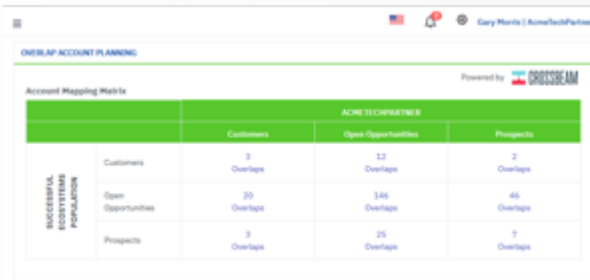
Indiana Jones: Happens to me all the time."

Indiana Jones and the Last Crusade

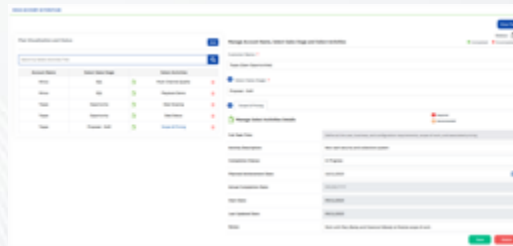
**END CUSTOMER
OVERLAP ACCOUNT MANAGEMENT**

**PARTNER
ACCOUNT MANAGEMENT**

Opportunity Mgmt.



Build Account Plans



Cover / Table of Contents



Partner Performance Dash



Opportunity Mgmt.



Manage & Track Deal Progress



Business Action Plan



Partner Performance Dash



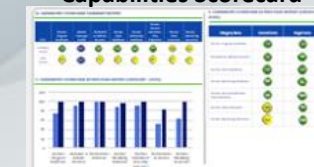
Channel / Partner Contacts



Task Manager



Capabilities Scorecard



Plan Accept / Approve



Finding the Right Opportunities Requires You Dig in the Right Spot

ACMETEHPARTNER VS. SUCCESSFUL ECOSYSTEMS'S OPEN OPPORTUNITIES

Search:

Overlap Account Name	Overlap Account Website	Partner Population	Brand Population
Albertsons	www.albertsons.com	Open Opportunities	Open Opportunities
Albertsons	www.albertsons.com	Open Opportunities	Open Opportunities
City Market	www.citymarket.com	Open Opportunities	Open Opportunities
Hyvee	www.hyvee.com	Open Opportunities	Open Opportunities
Shaws	www.shaws.com	Open Opportunities	Open Opportunities
Shoprite	www.shoprite.com	Open Opportunities	Open Opportunities
Statler Bros	www.statlerbros.com	Open Opportunities	Open Opportunities

Previous 1 Next

Overlap Account Planning

- Overlap Acct. Matrix
- Build Overlap Acct. Plans
- Manage Overlap Acct. Plans

Powered by CROSSBEAM

Account Mapping Matrix

		ACMETEHPARTNER		
		Customers	Open Opportunities	Prospects
SUCCESSFUL ECOSYSTEMS POPULATION	Customers	10 Overlaps	5 Overlaps	9 Overlaps
	Open Opportunities	14 Overlaps	7 Overlaps	26 Overlaps
	Prospects	10 Overlaps	6 Overlaps	21 Overlaps



Work Overlap Accounts with Partners to Advance Down Your Sales Stages

How to Build Overlap Account Action Plans in Minutes:

- 1) Select from Overlap Accounts
- 2) Select Sales Stage
- 3) Select from Recommended Activities

Overlap Account Planning

Overlap Acct. Matrix

Build Overlap Acct. Plans

Manage Overlap Acct. Plans

BUILD ACCOUNT ACTION PLAN

Plan Visualization and Status [Add](#)

Search by Select Activities Title

Account Name	Select Sales Stage	Select Activities
Albertsons	MQL	Lead Score - Nurture
	SAL	Sales Pitch Convert to Opportunity
Dillons	Opportunity	Deal Reg Approval
		Deal Sizing Deal Scoping

Manage Account Name, Select Sales Stage and Select Activities

Customer Name: *
Albertsons

Select Sales Stage: *
MQL

Lead Score - Nurture

Manage Select Activities Details

Full Task Title: Score leads to prioritize MQLs & implement nurture emails and content

Activity Description: Work with Mary Hatch to build nurture campaign

Completion Status: Completed

Planned Achievement Date: 10/15/2023

Actual Completion Date: 09/15/2023

Start Date: 09/15/2023

Last Updated Date: 09/15/2023

Notes: Clarence Odbodu needs to give his blessings

Save Delete



Plan-your-Work with your Partners and Work your Joint Account Action Plans



CROSSBEAM-PROVIDED ACCOUNT OVERLAP DATA (SUCCESSFUL ECOSYSTEMS VS. ACMETECHPARTNER)

Search:

● Completed
 ● In Progress
 ● Not Started
 ● Plan Not Created

		Standard Account Overlap Fields						Overlap Account Action Plan Fields						
Create/View Plan	Overlap Account Name	Overlap Account Website	Partner Population	Brand Population	Sales Stage	Brief Task Title	Full Task Title	Activity Description	Completion Status	Planned Achievement Date	Actual Completion Date	Start Date	Last Updated Date	Notes
Manage	Albertsons	www.albertsons.com	Prospects	Open Opportunities	MQL	Lead Score - Nurture	Score leads to prioritize MQLs & implement nurture emails and content	Work with Mary Hatch to build nurture campaign	●	10/15/2023	09/15/2023	09/15/2023	09/15/2023	Clarence Odbodu needs to give his blessings
Manage	Albertsons	www.albertsons.com	Prospects	Open Opportunities	SAL	Sales Pitch	Schedule - Deliver customized sales pitch, demo, case study	Work with Mr. Potter to finalize pitch deck	●	10/31/2023	-	-	09/15/2023	Develop ROI for the solution
Manage	Albertsons	www.albertsons.com	Prospects	Open Opportunities	SAL	Convert to Opportunity	Create a specific action for sales lead acceptance to trigger follow up meetings, registration, lead handoff, and opportunity status reporting	Work with George Bailey to implement the new process	●	10/15/2023			09/15/2023	Build a process in Salesforce

Overlap Account Planning ▾

[Overlap Acct. Matrix](#)

[Build Overlap Acct. Plans](#)

[Manage Overlap Acct. Plans](#)

Manage Overlap Account Plans:

- 1) Select Plans to View
- 2) Update Plan Status
- 3) Review with Partner to Track Progress
- 4) Update following meeting

Bring it all Together in One-Click MBR / QBR Exports



Partner Account Management

Cover / Table of Contents



Partner Performance Dash



Opportunity Mgmt.



Business Action Plan



Partner Performance Dash



Channel / Partner Contacts



Task Manager



Capabilities Scorecard



Plan Accept / Approve



Overlap End Customer Acct. Mgmt.

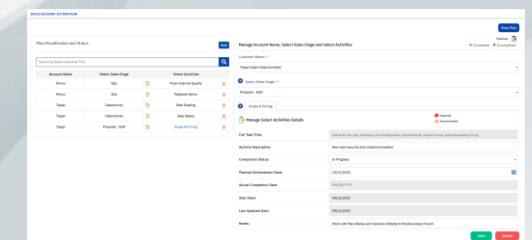
Opportunity Mgmt.

OVERLAP ACCOUNT PLANNING

Powered by CROSSBEAM

		ACMETECPARTNER		
		Customers	Open Opportunities	Prospects
INDUSTRY ECOSYSTEM POPULATION	Customers	3 Overlaps	12 Overlaps	2 Overlaps
	Open Opportunities	20 Overlaps	146 Overlaps	44 Overlaps
	Prospects	3 Overlaps	25 Overlaps	7 Overlaps

Build Account Plans



Manage & Track Deal Progress

OVERLAP ACCOUNT OVERVIEW BY ECOSYSTEM SECTOR VS. ACMEPARTNER

Account	Account Name	Account Type	Account Status	Account Manager	Account Lead	Account Contact	Account Address	Account Phone	Account Email	Account Website	Account Description	Account Notes	Account Tags	Account Created	Account Last Updated
1	Account 1	Account Type	Account Status	Account Manager	Account Lead	Account Contact	Account Address	Account Phone	Account Email	Account Website	Account Description	Account Notes	Account Tags	Account Created	Account Last Updated
2	Account 2	Account Type	Account Status	Account Manager	Account Lead	Account Contact	Account Address	Account Phone	Account Email	Account Website	Account Description	Account Notes	Account Tags	Account Created	Account Last Updated
3	Account 3	Account Type	Account Status	Account Manager	Account Lead	Account Contact	Account Address	Account Phone	Account Email	Account Website	Account Description	Account Notes	Account Tags	Account Created	Account Last Updated