

Co-Sell Best Practices

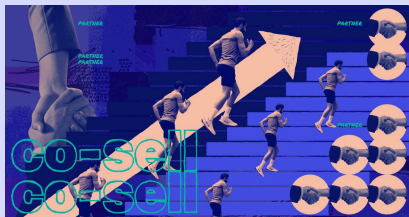
A guide to managing co-sell partnerships, streamlining sales and achieving mutual success through collaboration.



Overview

Co-selling is a collaborative sales approach where two or more partner companies combine their resources, expertise and networks to accelerate the sales process and increase the likelihood of closing deals.

On PartnerStack you can choose to have your partners submit potential customers as “Leads” that your internal sales team will work to close, or as “Deals” which the partner themselves will work to close.



ARTICLE

✓ [5 Signs You're Ready for Co-Selling Partnerships](#)

Why co-sell works

Co-sell partners are force multipliers. A co-sell partner program can extend your reach, accelerate deal cycles and improve win rates.

Benefits include:

Access to warmer leads: Co-sell partners introduce you to prospects they have a relationship with, skipping the cold outreach phase entirely.

Faster sales cycles and higher win rates: Deals close faster when a trusted partner is vouching for your solution.

Access to new Markets: Partners can position your solution within a niche context that resonates more deeply with their audience.

Increased customer trust: Customers are more likely to convert when recommendations come from a known and trusted advisor.

12 Co-selling best practices

1. Launch with a 30-day activation offer:

Don't let partner momentum stall after joining. Create a clear and actionable offer for new partners in the first 30 days that aligns with your KPIs. Early engagement sets the tone for a productive, long-term relationship.



i.e. Incentivize partners to refer their first lead within 30 days of joining your program to earn a bonus commission.

2. Build a defined partner persona:

Like having a defined customer persona guides your marketing outreach, having a defined partner profile will help guide your recruitment, onboarding and activation of your co-sell partners. Think about what kinds of clients the partner serves, what metrics matter most to them and how your product can help their clients succeed.



i.e. If you're targeting [EOSWorldWide](#) consultants (all 700+ which have a PartnerStack profile), include a pitch about how your tool helps their company scale and systematize, something these consultants help companies with.

3. Lead with value, not just rev-share:

Rev-share is great, but is not the single motivator for partners. Reiterate often the value your program gives beyond the rev-share. Articulate how your solution helps partners close more deals, deliver better results, or differentiate their services. Shopify tells partners they can serve their clients 5x faster by partnering with them. This is much more valuable than a simple rev-share.



[Watch here](#) to see a Shopify partner rave about their co-sell partnership (without once mentioning rev-share).

4. Host a Lead exchange call early with new partners:

Encourage mutual value by scheduling a "lead exchange" call shortly after onboarding. Each party brings a few potential leads to evaluate for referral-readiness. This kind of structured collaboration turns partner relationships into revenue channels faster.



Tools like [Crossbeam](#) can automate this process by surfacing overlapping accounts and shared opportunities.

5. Provide enablement tailored to your partner's vertical:

While generic decks and broad enablement can be good to get up and running, as you mature your cosell program build out customer and partner specific sales collateral and customer stories. Look back at your defined partner persona. What information does your partner need to be successful? Along with industry specific case studies, provide your partners with co-branded pitch templates, and FAQs/cheat sheets.



Help your partner's answer the questions: "Why should my clients care?" "What KPIs does this address for my customers?" "What gaps does your product solve in my industry?"

6. Present at a Lunch-and-Learn:

Book time with a partner's company team (Sales, CS, leadership) to walk through your product and its value proposition. These sessions build familiarity, reduce friction and create internal champions for your program.



Even a short 20 minute Zoom demo can build your partner's confidence, strengthen your relationship and unlock deeper alignment.

7. Establish "always-on" communication channels:

Meet your partners where they're at! It is common to have a shared Slack channel or other method of communication so your co-sell partners have a direct line of communication to you or your company.



Consider publishing a "How to reach us" resource in your PartnerStack dashboard to help partners understand how and where they can contact you.

8. Align on sales enablement and GTM strategy:

Co-selling succeeds when both teams know what to say, who to approach, and how to pitch. Develop a joint go-to-market playbook that answers; who are the ideal accounts? What signals make a lead qualified? How should we position ourselves in deals?



Include objection handling, demo prompts, and ideal customer stories. Bonus points if you tailor these resources to the partner's vertical (best practice #5)

9. Create a partner plan and align on goals and milestones:

Develop a collaborative partner plan where each party clearly understands the goals, KPIs and milestones for the referral partnership. This plan should outline clear mutual objectives and goals for your co-selling program.



Consider things such as pipeline contribution targets, lead qualification criteria and specific activities or campaigns to drive referrals. This ensures alignment and shared accountability for success.

10. Launch a public partner directory:

Showcase your partners and help drive demand back to them by listing them on your website. A directory not only helps your partners grow, but also reinforces the legitimacy of your ecosystem.

👥 HubSpot's [partner directory](#) is a best-in-class example.

11. Use partner tiers to motivate and scale:

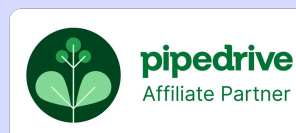
Partner tiers offer increasing levels of benefits (e.g., higher commission, co-marketing support, access to beta features) as partners achieve milestones. Clearly communicating what your partner tiers are, how partners can advance through them and what they can stand to gain at each tier are essential to help motivate your partners. If they don't know there's a next level, they're less likely to reach it.

🏆 Tiering helps you scale efficiently while motivating top performers to go further.

12. Offer partner badges and recognition:

Who doesn't like a badge? Partners love to be able to showcase their credentials, whether its in their email signature, on their website or on LinkedIn. Give partners multiple ways to proudly showcase their affiliation with your brand with email signature graphics, social media templates and website badges.

🏆 A badge signals credibility to prospects and incentivizes deeper engagement.

















Lead form example:

When building out your lead form consider; what information do you need to gather from your partner and what information do you need to sync to your internal systems. Use the lead form description to clearly communicate to your partner what happens after they submit a lead.

Key categories to cover:

- ✔ Customer contact and company basics: names, emails, company name, company website, role of contact, etc.
- ✔ Qualifying details required by your team: what product is the customer interested in? What challenges are they looking to solve? Current solution (if applicable), estimated time to buy, estimated budget, customer company size, etc.
- ✔ Partner context: Can be a simple partner notes field, or specific questions i.e. What support do you need for this deal?, What are the customer's business goals/challenges?, What other information do you think can be helpful for our team?

Type	Label	Required
 Email	Email	Yes
 Input	First name	Yes
 Input	Last name	Yes
 Input	Phone	Yes
 Country	Country	Yes
 Input	Address Line	Yes
 Input	Company	Yes
 Input	Website	No
 Drop-down	Employees	No
 Date	Estimated close date	Yes
 Number	Estimated number of users	Yes
 Currency	Estimated Budget	Yes
 Email	Partner Contact	Yes
 Text area	Partner notes	Yes

Example of benefits provided by a leading co-sell program:

Clearly advertise the benefits of joining your co-sell program to prospective, and current partners. If benefits are tiered, be sure to indicate this to help motivate partners to grow through the tiers and increase their benefit access. Below is an example of how one leading co-sell program has broken their benefits down in to co-marketing, product, partner enablement and community categories.

Benefits

Co-marketing

- Partner Badge
- Listing on Agency Partner Directory
- Eligible for featured quote in blog post
- Eligible for guest blog post with backlink
- Eligible to be featured in a case study
- Eligible for guest post with backlink
- Eligible for co-marketing campaign

Product

- Invitation to product betas
- Prioritized partner support
- Invitation to product feedback sessions
- Dedicated Partner Team Point of Contact
- Collaboration sessions with product team for feedback

Partner Enablement

- Reseller onboarding training opportunities
- Co-branded sales resources
- Custom Resource Center
- Eligible for monthly revenue share
- Eligible for quarterly bonus opportunities
- Eligible for on-site reseller training
- Eligible for joint sign-up page

Community

- Eligible for social amplification on socials
- Eligible to speak at industry events
- Eligible to be featured in agency webinars
- Eligible to speak at sponsored events

How to get started

Interested in using Leads or Deals to co-sell with your partners? Reach out to your CSM for more information and to explore adding this feature to your PartnerStack plan.

Additional resources

- [5 Signs You're Ready for Co-Selling Partnerships](#)
- Webinar: Hubspot: Activate and Onboarding Partners with CallRail and PartnerStack. [Link here.](#)
- [Co-selling for Enterprise Partnerships](#)
- [Co-selling in a Partner Ecosystem](#)

