



The Sales Leader's *Co-Selling* Playbook

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From Good to Great

Chief Revenue Officers (CROs) and sales leaders across industries increasingly turn to partner-sourced revenue to drive growth.

28%

of overall company revenue comes from co-selling in companies with mature partnerships

[Forbes](#)

33%

of global sales will come from partner ecosystems by 2025

[McKinsey & Company](#)

71%

of organizations report that their third-party network contains more vendors than it did three years ago.

Partnership and Strategic Risk

Gartner projects that the market for third-party risk management and partnerships will continue to grow as businesses increasingly rely on complex ecosystems to achieve their strategic goals. [Gartner](#)

However, many sales leaders and reps lack training on effective co-selling execution. Relying on outdated direct sales strategies, these teams struggle to meet sales expectations in an increasingly-competitive market.

If you want to
go fast, go alone.

If you want to
go far, go together.

There's a better way to win together.

”

Jeanine Becker and David Smith, Authors on Cross-Sector Collaboration

Despite the billions of dollars invested in cross-sector partnerships globally in recent years, the full potential of these partnerships is far from unlocked. [Learning for Sustainability](#)

At Forecastable

..we empower B2B organizations of all sizes..

..to establish and scale highly-effective co-growth programs (co-market/co-sell/co-serve) through a unique combination of services and technology (fully-managed stack OR use your existing stack). We streamline the process, eliminating the need to manage multiple tech or service providers.

How to use this playbook

This guide is filled with actionable takeaways you can implement immediately.

Share it with your sales reps and colleagues who can benefit from it—success comes when we work together! You'll also find a “Do It” assignment to help you apply what you learn right away.

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Introduction

Why Co-Selling Matters

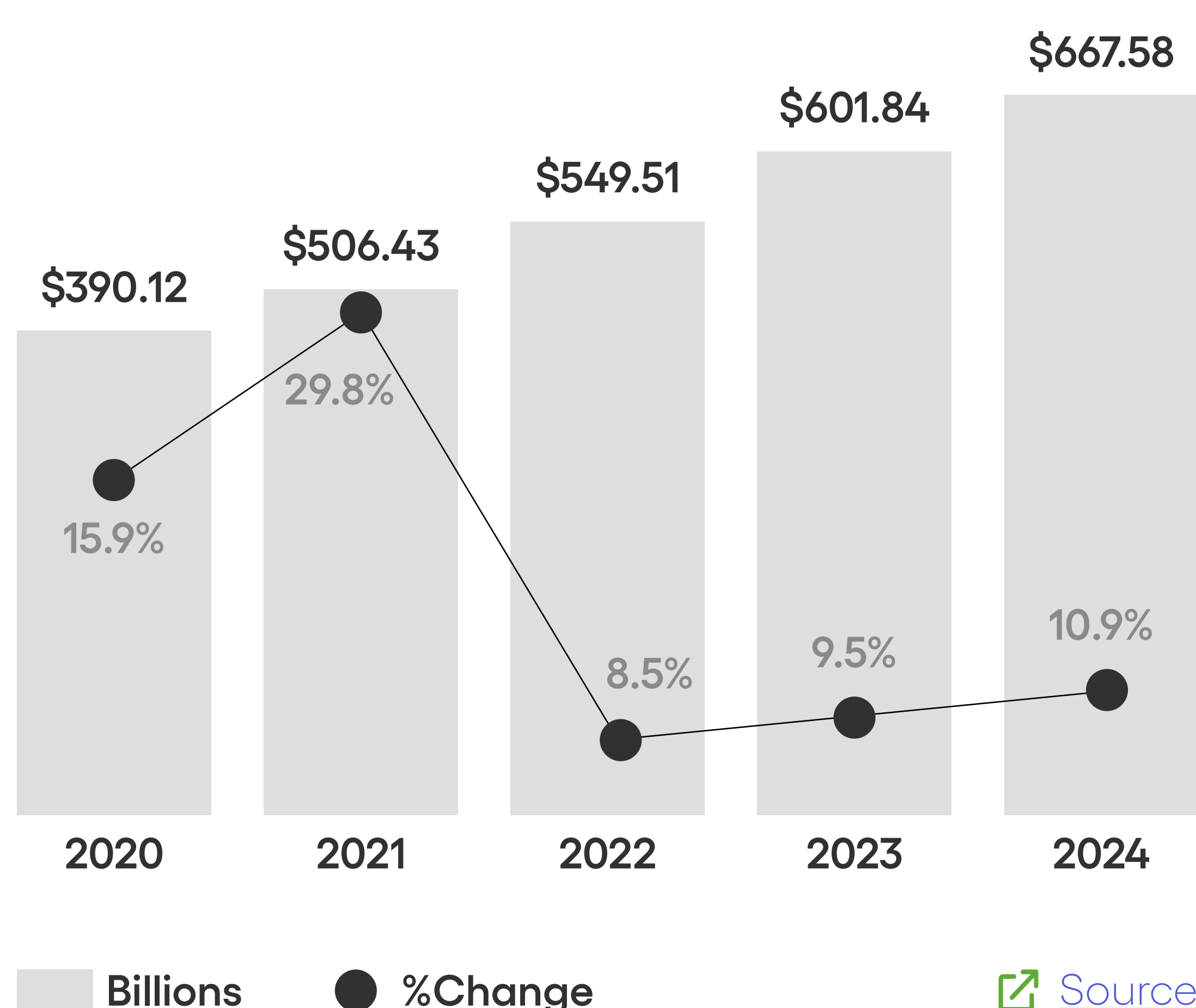
B2B has a problem.

Prospecting has become increasingly ineffective, with endless emails, phone calls, and LinkedIn messages overwhelming buyers. They're fatigued by the constant barrage, and the situation is worsening. The SaaS market alone is projected to triple over the next five years, further intensifying the competition for attention.

Marketing leaders face a similar challenge with efficiency in demand generation. CAC is on the rise. Paid advertising costs still remain unattractive, but just like the spike in 2021, in a pandemic-driven response. 2024 & 2025 will see spikes.

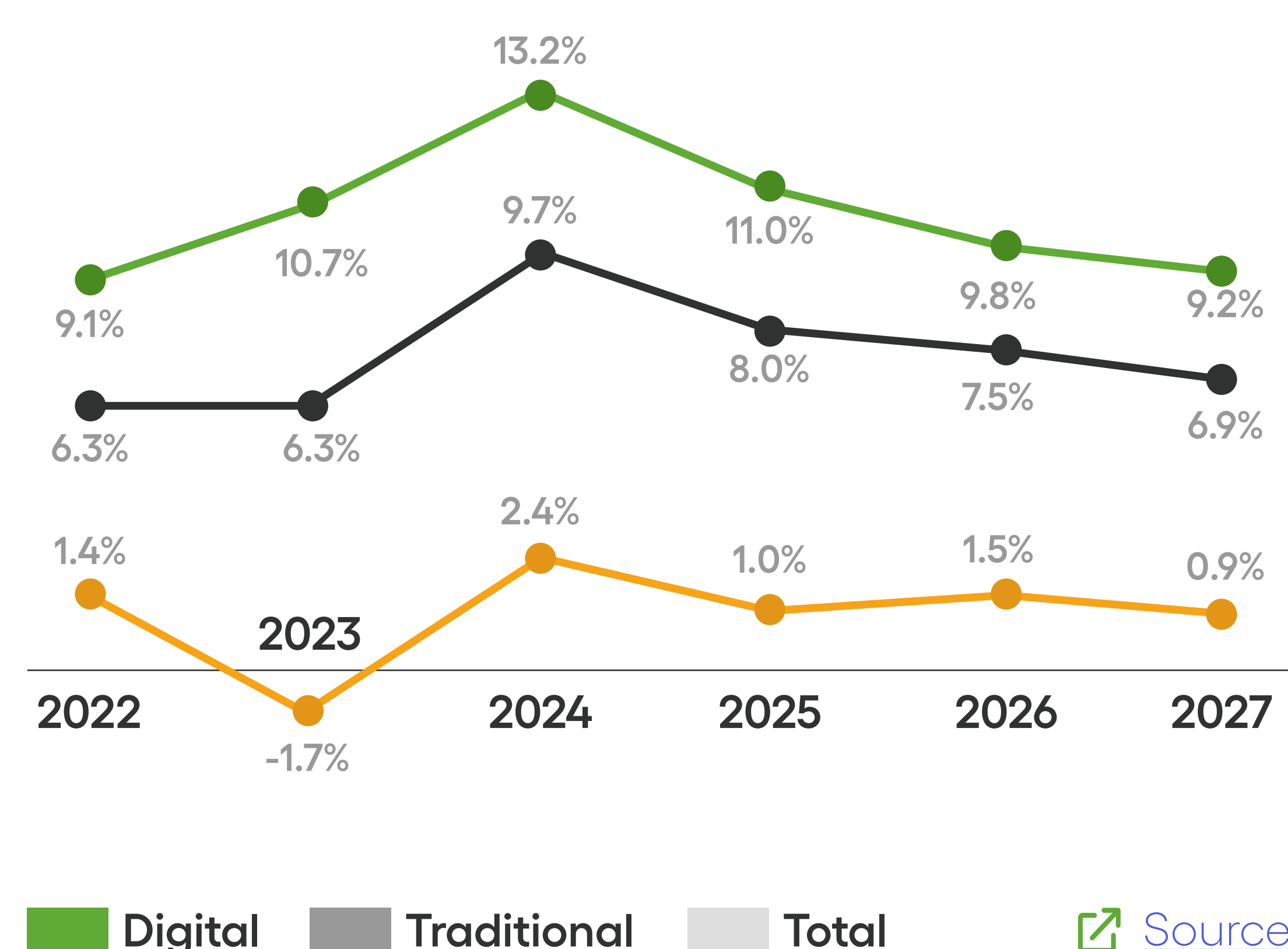
Digital Ad Spending

Worldwide, 2020-2024



Ad Spending Growth for Digital, Traditional and Total Worldwide, 2022-2027

% Change



This challenging environment is why B2B leaders are turning to co-growing with partners.

Co-selling offers a strategic advantage

Lower customer acquisition costs:

Partner networks tap into established relationships, streamlining lead generation.

Increased revenue, retention, and customer lifetime value:

Combined solutions deliver greater value and are harder to replicate or pick apart.

This playbook highlights the essential co-sell behaviors that set successful sales leaders apart in growing partner-sourced revenue.

The data speaks volumes

84%

of companies consider partner ecosystems essential to their strategy. [Forrester](#)

Some of the world's biggest brands are embracing partner-sourced revenue

Amazon Web Services is doubling down on partners and ramping up investments in co-selling with its 100,000+ partner ecosystem.

[CRN](#)



Google Cloud aims to attach partners to 100% of customer engagements.

[CRN](#)



The Urgent Problem

Bridging the Knowledge Gap

As focus shifts to partnerships..

..a significant hurdle remains – most sales reps lack the skills, experience, and tools to co-sell effectively with their partners.



Here's a real-world scenario

A SaaS company is co-selling a \$400k deal with a closing date of October 25th. Their services partner, acting as a trusted advisor to the buyer, identifies a crucial missing feature and recommends an integrated tech partner (co-selling partner) to fill the gap.

However, the integration partner's close date falls weeks after the SaaS vendor's target, and the services company's timeline is even further behind. This misalignment creates chaos, frustrates the buyer juggling three separate sales cycles, and jeopardizes the entire deal.

This playbook gives practical and tactical ways to improve co-sell execution.

Untapped Potential

The Co-Sell Opportunity

Today's co-selling processes often lack structure.

Organizations must navigate numerous steps with a partner before achieving any level of consistency and success in co-selling. An undisciplined approach leads to inconsistency, inefficiency, and misaligned goals.



Stephen Covey

"Most leaders would agree that they'd be better off having an average strategy with superb execution than a superb strategy with poor execution." [QuoteFancy](#)

While strong partners eventually find their rhythm, the rest struggle, and many simply fail. Furthermore, even in a successful partnership, turnover can cause regression in the process.

The goal is to reduce the time it takes to achieve and maintain success in each co-selling partnership.

A formalized process ensures

Faster time to value

Streamlined onboarding leads to quicker co-selling wins.

Reduced turnover risk

Clear roles and responsibilities minimize disruption.

Sustainable growth

Consistent processes ensure long-term co-selling success.

”

Anthony J. D’Angelo

When solving problems, dig at the roots instead of just hacking at the leaves.

[KaiNexus Blog](#)

A formalized process can consist of many components, depending on the complexity of the co-sell motion being activated and the complexity of the sales cycle itself:

1

Co-Sell Gating

Not every partner warrants becoming a co-sell partner.

2

Co-Sell Scenario Planning

Quantifying the addressable market of each co-sell scenario being brought to market by you and the partner(s).

3

Joint Opportunity Qualification

The merging of qualification methods, so every seller is looking at the deal through the same qualification lens.

4

Co-Sell Plan Development

Determine order of operations for sales execution. Who’s doing discovery, demos, technical architecting, aligning with executives, etc. at each stage of the cycle?

5

Partner Mapping

Visualize the partner's org with whom you're co-selling to determine who's already in your corner, who needs convincing, who's potentially against you, and who's aligning with your execs.

6

Buyer Mapping

Visualize the buying committee with whom the co-selling partners are engaged, so every member of the deal team has the same view of who's who in the zoo including power/authority, sales preference, etc.

7

Customer Mapping

Visualize the customer org you're serving for more-effective internal upsell/cross-sell, partner intelligence, and advocacy.

8

Co-Selling

Collaboration and shared workspaces facilitate execution excellence through centralized deal management that create more wins.

What is Co-Selling

Co-selling is a powerful sales strategy where teams from different companies join forces to win deals “together.”

It’s important to distinguish co-selling from other collaboration methods:

Referring

You connect a potential customer with your partner, who then takes the lead on the sale and runs with it independently.

Sell Through

You independently sell someone else’s product or service.

Sell With

You simply inform your partner about a potential lead without actively working together on a deal.

The key difference In co-selling, your partner actively helps close your deal, often because they have a solution that complements yours. You present a unified front to the customer, jointly addressing their needs.

Let’s look at the difference in action:



Scenario: Software & Professional Services

Referral: After closing a sale, a SaaS company (Company A) refers a new software customer to services partners (Companies B and C) to extend or integrate the product into other technologies.

Co-Sell: A SaaS company (Company A) brings a professional services partner with subject matter expertise (Company B) into a deal with a large financial institution to co-architect a solution with Company A’s technology at the core, potentially recommending additional products. Both teams work together throughout the sales cycle. Neither team is brought in after the fact. Unified front.

The Co-Selling Advantage

Co-selling goes beyond just selling multiple products.

Crafting your partnership better together story (value proposition) that clearly aligns your solution to the unmet need ensures each partner articulates the same story to the market.

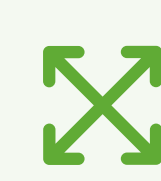
You're offering a comprehensive solution that addresses the customer's entire need. This collaborative approach strengthens your value proposition and leads to:



**Increased
pipeline**



**Faster
closes**



**Bigger
deal sizes**



**Longer
retention**

Direct Selling vs. Partner-Sourced Sales Models

Traditionally, sales has been a solo act.

In the direct sales model, your sales reps independently approach each customer one-to-one, building relationships from scratch.

It's a cold relationship, meaning no one directly connected to the stakeholders you seek to engage can/will make a warm introduction or at least inform them you exist. This can be a slow and resource-intensive process without warmth.

The Partner Co-Growth Advantage

A smarter method exists

Partner-led models, also known as an “ecosystem-led growth” strategy or a “nearbound” strategy, leverages your ecosystem – a network of partners and related companies who already have established and trusted relationships with your target customers.

Here’s how it works

1

Identify trusted partners.

Partner with companies who share your Ideal Customer Profile (ICP) and understand their needs, whether growth-related or otherwise.

2

Craft your true, scenario-specific, joint value story.

Don’t just merge one pagers. This requires answering very-specific questions to generate a customer-relevant, persona-based joint value story.

3

Leverage existing relationships.

Between you, your partners, and your respective professional networks, many warm introductions and conversations can be started systematically.

4

Co-sell for mutual success.

Partners have deals on the table alongside yours, creating a win-win situation through co-selling.



Two reps from different companies can’t just be thrown into a room and be expected to work together nicely. There should be a process in place for **every** activated co-sell motion, guided by an ops-level admin resource, keeping everyone aligned. Training sales does NOT work.

Maximizing Your Ecosystem

Here's a breakdown of the different levels of partner advocacy you can achieve in a partner-sourced model.

The most effective scenario occurs when both partners have mutual interests and work in unison to close deals. When your partner stands to gain from net new, expansion, or retention revenue by promoting your product or service, they have an added incentive to advocate for you.



The Holy Grail – Co-Selling



Value Level 3 – Introductions

A warm introduction from your partner is ideal and significantly boosts your chances of success.

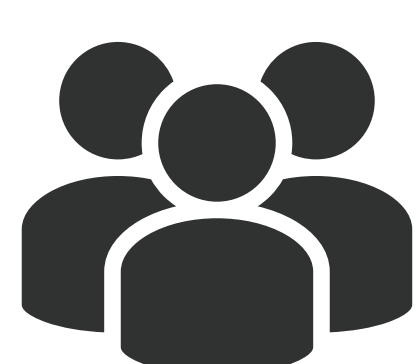
⚠ The structure of that introduction is more critical than you think.



Value Level 2 – Advocacy

If a direct introduction isn't possible, ask your partner to at least inform the customer about your existence and the value you can bring.

⚠ Don't beg. There's a process for doing this and ghost-written email templates you can use to get it done properly.



Value Level 1 – Intelligence

At the very least, leverage your partner network to share account intelligence – valuable information you can use to initiate a conversation and gain an edge over competitors.

⚠ If you think your reps are going to do this, think again. This is a Partner BDR function.

Building Trust

9.5x

attempts to make contact

Cold Call Attempts

It now takes an average of 9.5 cold call attempts to reach a prospect, up from 8 attempts in previous years. Despite this, many salespeople still stop after fewer attempts.

[The Marketing Blender](#)

5x

follow-up attempts after first meeting

Follow-up Efforts

Approximately 80% of sales require five follow-up calls after the initial meeting. However, nearly half of salespeople give up after just one follow-up call.

[Qwilr – The modern way to sell](#)

Co-selling is becoming the go-to strategy for most revenue teams in today's crowded sales landscape. Overwhelmed by sales communications, buyers rely heavily on trusted recommendations. This is where co-selling shines.

Understanding Your Customer's World

Imagine the customer at the center of their universe, surrounded by trusted relationships. These relationships influence their buying decisions.

Let's explore these circles of influence



Pro Tip

The Customer Trust Score is what matters!

Ditch the cold calls and emails. Focus on building relationships within your customer's universe, or ecosystem, to unlock new opportunities.



No! – You cannot spam your partners' CSM, presales, or sales teams. That's a quick way to ruin your reputation. You need a system and a process for value-added systematic engagement. Not only will you get exactly what you want (revenue), they'll be **ECSTATIC** to give it to you.

3

Inner Circle

The customer's most-trusted relationships are with their own satisfied customers, employees, investors, advisors, and board members. A recommendation from them offers instant credibility.

[Customer Trust Score = 3]

2

What this playbook focuses on

Trusted Vendor Ecosystem

These are existing vendors with whom the customer already has established and contracted relationships. This is the most-common introduction and is where co-selling comes shines. Partnering with these trusted vendors allows you to essentially borrow the already-established trust between customer & vendor to give yourself instant credibility and a faster time to opportunity creation.

[Customer Trust Score = 2]

1

Extended vendor ecosystem

These are vendors of the customer's vendors. While their influence is weaker, they can potentially connect you with the customer's inner circle or direct vendors.

[Customer Trust Score = 1]

0

Cold outreach

If you lack connections in your customer's universe, you're essentially "lost in space." You're relying on cold emails or phone calls to get noticed. Even if successful, your sales cycle is longer, as you must first build trust.

[Customer Trust Score = 0]

Co-Selling Complexities

Co-selling introduces a layer of complexity.

Unlike traditional sales, co-selling involves an elaborate network of internal and external stakeholders:

Your team


SDRs, customer success, technical presales, demo resources, legal, finance, sales operations, professional services, other account executives – the list can be extensive.

Partner teams

Your co-selling partner likely has a similar number of internal stakeholders involved in the deal.

The buying committee

On the customer's side, you'll typically encounter 8 to 10 stakeholders with a diverse set of priorities, agendas (personal/professional), and personalities.

 For one deal, with a single co-selling partner, sales reps could manage anywhere from 10 to 25 internal and external stakeholders. Given that most reps work multiple deals, the number of stakeholders can multiply 5 to 10 times depending on the number of deals and co-selling partners involved.

Without a structured approach, co-selling partners can quickly become disorganized, which causes the buyer frustration.

Managing a Multifaceted Process

Without systems and processes, the complexity of a co-sell deal can quickly lead to:

Misalignment Lack of coordination between teams creates confusion for the buyer and for your forecast commits.	Friction Buyers feel like they're managing multiple sales cycles instead of experiencing a seamless, unified buying process.	Indecision Confusion can cause the buying committee to shop around- or worse- not make a decision at all. Telling you they'll reconsider next fiscal year.
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 A loss to “no decision” typically indicates either the opportunity wasn’t properly qualified or the co-selling partners created too much friction through misalignment. Addressing the internal complexities of co-selling is crucial to avoid this.

Do it

Exercise

To overcome these complexities, you need to build a structured approach to co-selling. Use [this template](#) to list all the internal and external stakeholders involved in your co-selling deals, including net new, upsells, cross-sells, and renewals.

List by role, persona, or title

Your team members Sales, presales, customer success, legal, etc.	Partner representatives Stakeholders from your co-selling partner’s organization.	Key buying-committee members Decision-makers on the customer side and their role in the buying committee.
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Ask Questions & Take Action

Once you map out your stakeholders, use these questions and action steps to guide your co-selling process:

Sales Process

Ask

Which resource from each co-selling partner does what, and when?

Do

Clearly define roles, responsibilities, and timelines for each team member involved from both sides.

Communication

Ask

Who communicates with the prospect, and how often? How are we communicating across the co-selling partners to ensure we're aligned on deal-stage progression, next steps, close dates, etc.?

Do

Establish a communication plan for consistent messaging across all stakeholders, ensuring everyone is aligned.

Executive Alignment

Ask

Which executives, internally and from co-selling partners, should we align with executives on the buying committee?

Do

Identify key executives on both sides who can champion the deal and address any concerns at the highest level.

Purchase Process

Ask

How is the buyer making this purchase, and through what contracting mechanism? Are we using our paper, our partner's paper, or the customer's paper? What's procurement like?

Do

Understand the customer's procurement process, contracting needs, and potential hurdles (e.g., security reviews).

Co-Sell Execution

Current State

Co-selling is evolving

While it offers immense potential, many organizations struggle with its execution. Here's a glimpse into the current state of co-selling across personas typically involved.



Sales Reps

Internal focus leads to misaligned close dates and inconsistent communication with buyers. A lack of centralized notes creates confusion.



Sales Managers

Limited visibility into partner activity, weak relationships with their counterparts, and inability to see the “full deal picture” hinder effective co-selling.



Partner Managers

Dependence on sales reps for updates creates blind spots. CRM data alone offers an incomplete picture.



Technical Presales


These overloaded resources struggle to collaborate effectively with partner counterparts. They're reliant on sales rep discovery notes from all partners.



The Buyer

Juggling multiple stages (scoping with one partner, contracting with another) across separate communication channels creates frustration. They desire a unified experience. They're also managing other purchases and day-to-day responsibilities.

Understanding these perspectives and challenges is crucial for crafting an effective co-selling plan. By walking in the shoes of each stakeholder, you can develop a process that addresses their needs. This approach leads to a more cohesive, manageable, and enjoyable co-selling experience for everyone involved.

 Consider your co-selling stakeholders beyond those listed here. Tailoring the co-selling process to address their specific needs is critical to success.

Conclusion

In conclusion, the increasing inefficacy of direct selling in B2B environments necessitates a shift towards co-selling strategies.

The overwhelming communication attempts from direct sales have led to buyer fatigue, while the competitive landscape intensifies with projected market growth. Co-selling offers a strategic advantage by leveraging partner networks to reduce customer acquisition costs and enhance revenue and retention through combined solutions.

However, the potential of co-selling remains largely untapped due to the lack of structured processes and alignment among partners.

To overcome this, organizations need to implement formalized co-selling processes that streamline onboarding, define clear roles, and ensure consistent execution. By addressing these challenges, companies can achieve faster time to value, reduced turnover risk, and sustainable growth, making co-selling an indispensable strategy for thriving in today's complex sales landscape.



Coming Soon!

The Sales Leader's Co-Selling Playbook **Part 2:** Co-Sell Planning & Preparation.

Ready to dive deeper into the co-selling advantage?

In Part 2, we'll cover partnering with purpose, scenario planning, execution and sales enablement, and building a data-driven co-sell business case.



Improve *Co-Selling* Increase Revenue

**Generating partner-sourced revenue
has never been more predictable.**

We're designed by revenue leaders, for revenue leaders.

- Improve B2B sales execution and collaboration
- Maximize ROI from your existing tech stack
- Lead your revenue teams through the transition from direct selling to co-selling

 **Schedule a Discovery Call Today.** Visit [Forecastable.com](https://forecastable.com) to learn more.

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Appendix

Use this template to log all internal and external stakeholders you encounter in your sales cycles:

Internal Stakeholders

Title	Persona	Description/Comments
Solutions Consultant	Presales	Demos, Technical Discovery
Account Executive	Sales	Guiding the cycle, Discovery, Demos, etc.
Sales Development Rep (SDR)	Sales	Initial contact with account (in some cases)

External Stakeholders (Buying Side) Using Forecastable’s internal descriptions as an example

Title	Authority/Role in Deal	Description/Comments
CRO	Economic Buyer	Co-Selling requires multi-department collaboration across revenue teams. The CRO can create a budget after early co-sell wins (closed/won deals) to replicate more of what’s already working.
Head of Direct Sales	Decision Maker	Feeling the most pain right now because of direct selling. Needs to hit targets through Partner Co-Selling without taking huge budgetary or career risks until proven.
VP, RevOps	Technical Evaluator	Wants to quickly know what’s hooking in where for any initial light pilots and what the path to a full deployment looks like in the future, so there aren’t any surprises. Can do integrated and non-integrated co-sell deployments to avoid red tape/reduce friction.

Internal Stakeholders (Co-Selling Partners)

Title	Persona	Description/Comments
Solutions Consultant	Presales	Demos, Technical Discovery
Account Executive	Sales	Guiding the cycle, Discovery, Demos, etc.
Sales Development Rep (SDR)	Sales	Initial contact with account (in some cases)