

# WIN MORE TOGETHER

**FORCASTABLE**

The #1 Partner Co-Selling Methodology

## The Partner Manager's Guide to a Sales Rep's Co-Selling Mindset

### Step into Your Salesperson's Shoes

Your mindset matters as a partner manager. For successful co-selling, you need to get inside your sales reps' heads and think like they do at every stage of the sales cycle. By looking at deals from their perspective, you can:

- Identify the right times to introduce partners, maximizing deal value.
- Address potential roadblocks before they stall momentum.
- Build collaboration between sales reps and partners.

This guide walks you through the six key sales-cycle stages, exploring what's going through your salespeople's minds at each step – from initial discovery to post-sale expansion.

### Walk a Sales Cycle in Their Shoes

Your salespeople have their own unique views – and sets of worries – when going through a co-selling motion. By putting yourself in their shoes, you become a more supportive and effective partner manager, driving more co-selling success.

Sales professionals often fear bringing partners into deals for various reasons. Here are a few resources you can share to help them overcome partnership fears and get into a collaborative mindset.

- [A Guide to Keeping Partners from Wrecking Your Deals](#)
- [Winning Partner-Involved Deals Through Situational Tag Teaming](#)
- [How to Know Which Partners Can Help or Hurt Your Team](#)

Let's journey through the sales cycle together from a rep's point of view. We'll look at their challenges and the questions and worries running through their head so you can better know how to support them at each step.

## Stage 1 - Discovery

In the discovery stage, navigating partner involvement can be tricky. It involves:

- Choosing between joint or separate approaches and evaluating partner capabilities if they lead discovery.
- Negotiating the overall duration of discovery for each team.
- Involving the right internal stakeholders with credibility to engage buy-side stakeholders, driving impactful discovery.
- Addressing potential personality clashes to prevent deal friction.

### Your Sales Rep's Worries

In this early stage, your sales rep has concerns about working with a partner. They wonder:

- **Will the partner price me out of the deal?** Your sales rep is basically placing a bet that the partner won't be over- or underpriced.
- **Will the partner introduce the wrong stakeholders?** Sales reps want to add as little friction as possible to deals and must be mindful of how many people are brought in.
- **Will the partner get commission breath?** Your rep is concerned about a pushy partner damaging the deal.

## Stage 2 - Demonstration

Whether you offer a tech product or services, demonstrations are happening, and they directly impact deals. Demos require:

- Deciding who leads and which resources and partners to include, while minimizing participants.
- Aligning on the right story.
- Tailoring the demo for different audiences with specific integrations for different groups.
- Presenting an organized, unified demo for buyer confidence.
- Coordinating follow-up actions post-demo.

### Your Sales Rep's Worries

Whether or not they're presenting the demo, your sales rep has questions and concerns, like:

- **Is the partner fully prepared to deliver their part of the story?** Your sales rep wonders whether the person doing the demo is intimately familiar with the story and prepared to practice together to ensure a smooth flow.

- **How much coaching does the partner need on demo etiquette?** Sales reps want to be sure their partners know what to ask in a demo and what to save for later.
- **Will the partner communicate anything to the prospect without first aligning as a group?** Your rep worries about disjointed messages confusing or turning off the buyer.

**Insider Insight:** If you partner with a SaaS company facing high demo demand but lacking enough solutions consultants to conduct demos promptly, you can step in as the demonstration arm as a services partner. This strategic move can lead to increased involvement in numerous deals.

## Stage 3 - Scoping

The scoping phase requires a good amount of administrative work and management from your sales rep, such as:

- Ensuring partners have enough discovery time for scoping without slowing down the sales cycle.
- Coordinating timelines and meetings for multiple partners, and addressing questions from technical resources.
- Mitigating potential friction from personalities involved (e.g., technical resources, whose matter-of-fact nature can come off as cold).
- Providing clear communication guidelines to partner-assigned resources for smoother collaboration.

## Your Sales Rep's Worries

On top of all these responsibilities, your sales rep is running through potential partner pitfalls in their head:

- **Should I be at every partner's scoping conversation?** Your sales rep is questioning if they should, or even can, be at every scoping discussion or if they should send a qualified member of your team.
- **Will the partner have an equal sense of urgency?** Reps are concerned about whether partners will prioritize deals and inform them about potential scoping delays.
- **Will the partner make unrealistic promises about capabilities or delivery timelines?** Your rep worries about independently-made promises that could keep them from meeting the buyer's expectations and timeline.

**Insider Insight:** Most sales reps wish they had assistance managing the detailed administrative tasks inherent in the sales cycle. Engaging a managed service, like [Forecastable](#), to support co-sell motions and management opportunities, can free up your sales reps to focus on what they do best – generating revenue! They even do things like calendaring and deal updates FOR the reps.

## Stage 4 - Pricing

Pricing is both an art and a science, especially in a competitive situation. For your sales rep, it involves:

- Agreeing on strategies with multiple partners.
- Co-Selling with shared vendors of competitors.
- Right sizing deal size across multiple vendors to remain competitive, while retiring as much quota as possible.

### Your Sales Reps' Worries

Your reps know pricing can hurt or even kill a deal. At this stage of the sales cycle, they're asking themselves:

- **Will the partner be overpriced or underpriced?** Your sales rep understands these can be deal breakers! (There are ways to help reps prevent or minimize this from occurring. Get some great strategies to share here: [B2B Sales Reps: A Guide to Keeping Partners from Wrecking Your Deals](#).)
- **Who will deliver the pricing presentation?** Reps are concerned about whether partners can present effectively and weigh that against the knowledge that more people introduce more risk.
- **How flexible will the partner be on pricing?** Your rep knows they sometimes need to trim the fat in a competitive landscape and wonder if the partner is willing to do so.

**Insider Insight:** Price drops should be a last resort. Strong relationships and a compelling business case often make price drops unnecessary.

## Stage 5 - Procurement

Procurement can be complex, and pricing plays a crucial role here. Mismanaged procurement can lead to lost deals and impact forecast accuracy, making it a critical stage for sales reps.

### Your Sales Rep's Worries

During procurement, your sales rep is focused on maintaining pricing and partner commitments. They're considering:

- **Will there be partner-related legal complexities?** Your sales rep might wonder whether a technology partner needs to go through an information security review and how long that will take.
- **Will the partner need to go on somebody else's paper?** Sales reps are concerned about challenges with buyer contracts, especially in large-enterprise deals where lengthy

contract negotiations can elongate the sales cycle, impact closing dates, and introduce friction.

**Insider Insight:** For frequent joint solution sales, having a Joint Procurement Guide streamlines processes, reduces sales cycle time, and helps procurement teams navigate key terms efficiently. This focused guide presents essential deal details, pricing, and highlights, and addresses common contract objections, making the procurement process smoother and faster.

## Stage 6 - Expansion

Sales reps often use partners to build credibility. Even with no immediate expansion or upsell opportunity, your reps can engage with existing customers by recommending partners that add value. This strategy puts them in a position of credibility for future upsell or cross-sell opportunities.

### Your Sales Rep's Worries

When it comes to driving expansion, your sales rep wants clarity about which partners hold real value. Having a readily-available list of impactful partners who can deliver these credibility-building moments, including how to articulate their value and introduce the partner, pays meaningful dividends for you and your customer.

## The Co-Selling Mindset

Every deal is complex, especially for enterprise sales reps handling six to ten deals simultaneously, each involving different partners. By putting yourself in your reps' shoes, you gain insight into the challenges, questions, and concerns they navigate across every stage of the co-selling journey – discovery, demonstration, scoping, pricing, procurement, and expansion.

This understanding empowers you to be a more supportive and effective partner manager, fostering collaboration and driving success in co-selling endeavors.

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