



Supercharge your partnerships.

Q3 2018 Overview



# Companies work together. Their **data** should too.

Modern teams demand data-driven workflows, measurable outcomes, and continuous improvement. Except when it comes to partnerships.

When two businesses collaborate with each other, questions like these are shockingly hard to answer:

- Which customers do we have in common?
- Are our sales reps targeting any of the same prospects?
- Is our technology integration reaching every possible user?
- In what specific ways can we help each other drive revenue?
- How can we measure the impact of our partnership?



# The Problem: A Modern Prisoner's Dilemma

You can't draw a Venn diagram unless you can see both circles.

For many good reasons, you won't send every partner your full customer list. And they won't let you see their entire sales pipeline.

So no one shares anything.

		Your Partner	
		Data Secrecy	Data Collaboration
You	Data Collaboration	<ul style="list-style-type: none"><li>Data Risk</li><li>Unfair Advantage</li></ul> Partner Success	<ul style="list-style-type: none"><li>Partner Success</li><li>Partner Success</li></ul>
	Data Secrecy	<b>Unfair Advantage</b> <ul style="list-style-type: none"><li>Ineffective Partnership</li><li>Ineffective Partnership</li></ul>	<ul style="list-style-type: none"><li>Unfair Advantage</li><li>Data Risk</li></ul>

## THE NAIVE EQUILIBRIUM

Both sides defect, creating a data vacuum and rendering true collaboration unfeasible and unmeasurable.

# The Cost: Billions in Lost Revenue

Lack of data visibility, attribution, and automation leave partner programs looking like cost centers rather than growth engines.

Technology and Channel Partnerships are uniquely valuable:

- Proprietary
- Scalable
- Low marginal CAC
- Accretive to brand and product

They are force multipliers for the entire revenue funnel, from lead generation to sales acceleration to account expansion.

Yet the majority of their potential sits dormant due to challenges created by the prisoner's dilemma.



# The Solution

Crossbeam is a collaborative data platform that helps companies build more valuable partnerships.



Crossbeam acts as an **escrow service for data**, allowing companies to find overlapping customers and prospects with their partners, while keeping the rest of their data private and secure.



# Common Use Cases

Crossbeam impacts your entire revenue funnel. For more use cases, visit [getcrossbeam.com](https://getcrossbeam.com).



## **PARTNER QUALIFIED LEADS**

At the intersection of your target prospect accounts and your partners' customers lies a wealth of information, introductions, and new revenue opportunities. Use your partners to surface and activate the *Glengary* leads.



## **ACCOUNT MAPPING**

Automatically exchange account owner information when relevant prospects, opportunities, or customers overlap. Use this data to connect your field reps with their peers in real time for coordination, collaboration, and co-selling.



## **CHANNEL CONFLICT AVOIDANCE**

No one wins when your direct sales team goes up against your channel partners. Avoid conflict by identifying overlapping targets at the top of your funnel while both sides keep their non-overlapping pipelines private and secure.

# Addressable Market

Crossbeam sells to any business with at least one partnership-focused employee.

## **B2B SaaS** (Current Focus)

Our initial target market.  
Cloud platforms participating  
in tech partner or channel  
sales ecosystems.

*Hundreds of thousands of companies*

## **B2B Tech**

Including software,  
hardware, infrastructure,  
security and services

*Hundreds of thousands of companies*



## **B2C Tech**

Including retail, finance,  
gaming, publishing, etc.

*Hundreds of thousands of companies*

## **Vertical Markets**

Healthcare, government,  
energy, manufacturing, etc.

*Hundreds of companies*

# This isn't PRM. This is Partner Success.

## PRM

- Forms driven
- Contact management
- Note taking
- Lead registration
- Marketing automation

## Partner Success

- Data driven
- Collaboration
- Workflow automation
- Attribution and measurement
- Partner discovery

# Thought Leadership Opportunity

There is very little effective thought leadership present in the areas of partnerships, alliances, business development, or channel sales. Crossbeam will fill this void.

## The Category Creation Playbook

- Build a captive audience from the underserved target market of partnership leaders and managers
- Develop helpful points of view and content around the best in-class strategies and tactics for this market
- Trade on CEO Bob Moore's decade-long resume and network as a speaker and author
- Long tail SEO portfolio via microsite strategy and [PartnerBase.io](#)
- Strategic guidance from relevant advisors (i.e. Crossbeam investor and Gainsight CEO Nick Mahta)



# A First-of-its-Kind Platform

Launched January 2019

- End-to-end self-service onboarding, partnering, and account management
- Company partnership network and invitation management system
- Rules management system for defining and managing data sharing rules
- Flexible, fast matching and analysis engine
- ETL layer supporting dozens of potential data sources (implemented via Stitch Connect)
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Q2 2019 Overview



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# How it Works

Companies use Crossbeam to analyze their combined data sets, surface actionable insights, and keep the rest of their underlying data private and secure. We are SOC 2, GDPR, and CCPA compliant.



## Connect your data.

Easy-to-use connectors for the leading CRMs and other systems of record. CSV uploads supported.



## Define your populations.

Intuitive UI allows you to carve out segments in your data to compare. These map to funnel stages like Leads, Opportunities, and Customers.



## Partner up.

Think LinkedIn for data. Easily find and connect with other companies. If they're not on Crossbeam yet, we onboard them for free.



## Grow.

Create a new, scalable source of growth by operationalizing how partners influence revenue.

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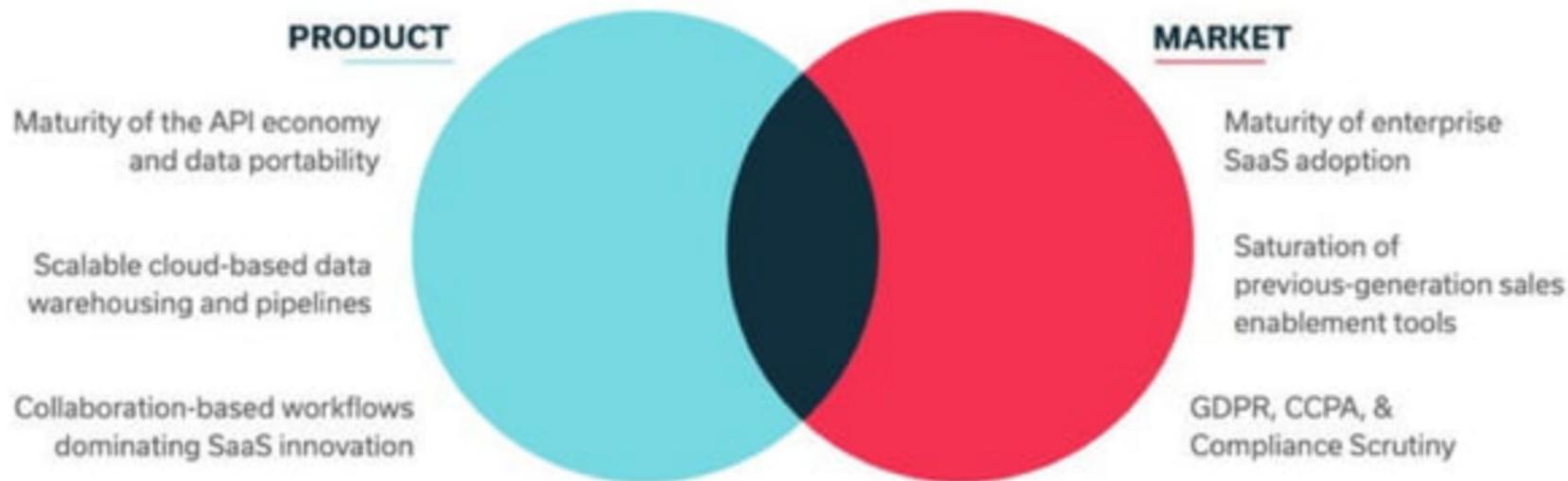


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# Why Now

Crossbeam could have never existed before now. We were founded at the collision of market inflection points and disruptive product trends.



# User Personas

The partnerships team sits inside the revenue organization.  
Crossbeam serves that organization end-to-end.



## Buyer and Owner

**Partnership Org Leader**

*Typically VP or Director-level*

Title includes the terms *partnerships, alliances, business development, or channel.*



## Champions

**Revenue Team Leaders**

*Typically VP or Director-level*

Sales, Marketing, and Ops leaders who benefit directly from new lead flow, deal intelligence, and enablement tools.

As our functionality expands, we expect to see this group become a buyer persona.



## End Users

**Dealmakers**

*Line-level reps and managers*

Partner managers, marketing managers, and sales reps whose day-to-day jobs are influenced by intelligence from the platform.

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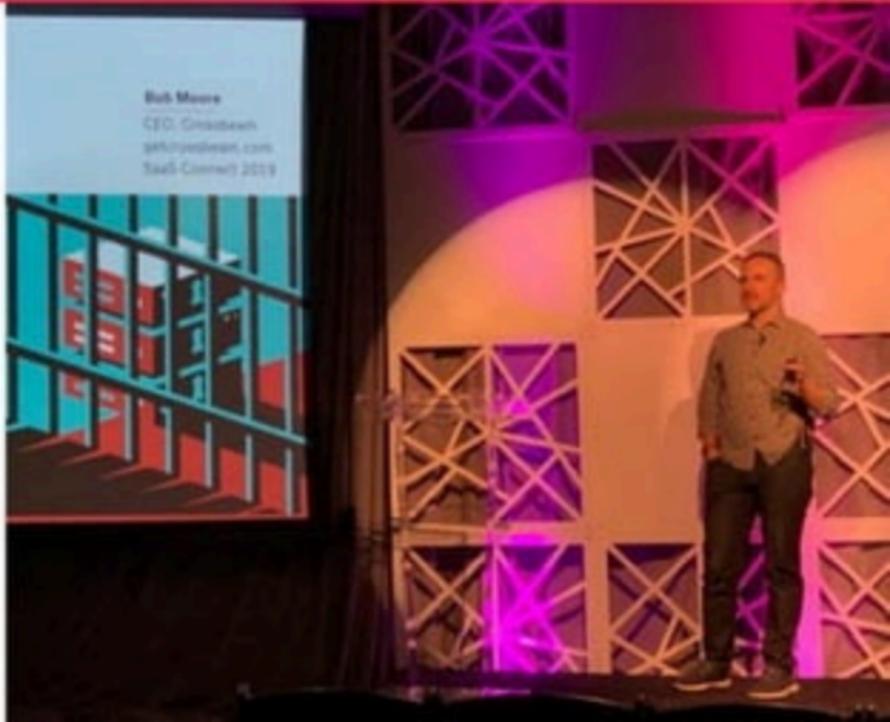
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Bob presenting at SaaS Connect 2019



# Mission, Vision, Values

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Established July 2018

## Our Mission

Create a more connected business world by powering the exchange of data between companies.

## Our Values

### Trust is Our Business

We create value by building trust in our company, our team, our technology, and our network. Never let anything compromise that trust.

### Equity

We will build a workplace that ensures everyone access to the same opportunities to share in our success.

## Our Vision

Transform the way all companies partner by building and leading an invaluable new class of software.

### Feed the Network

Our customer network is our most valuable asset. Prioritize its growth.

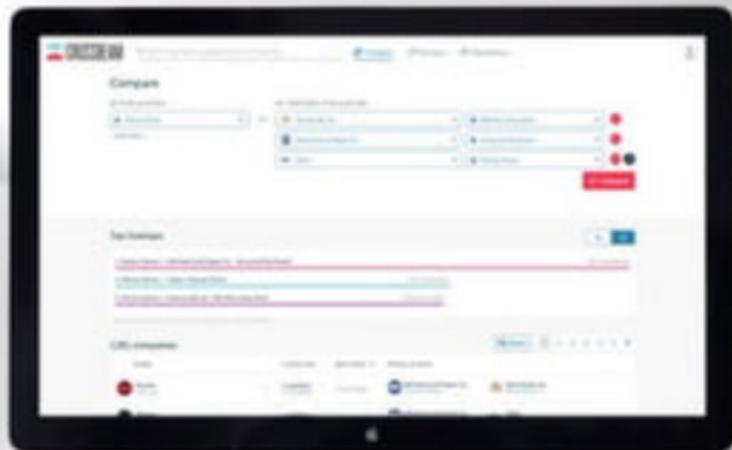
### This is Fun

Few people are lucky enough to do what we do. Follow the fun in every step of the journey.

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# Company Signups

Self-serve onboarding, earlier-than-planned network effects, and strong inbound market interest have led us to exceed our early goals for number, velocity, and acceleration of signups.



# Onboarding Acceleration

Product investments and network growth have decreased the average onboarding time by over 90% since launch. We anticipate a further 90% drop over time.

