

# The Nearbound Sales Blueprint

By Jared Fuller



**REVEAL**

# Contents

|   |    |
|---|----|
| <b>Foreword</b> .....                                     | 2  |
| <b>The Nearbound Era</b> .....                            | 2  |
| <b>From the “How” to the “Who” Economy</b> .....          | 3  |
| <b>The Nearbound Sales Blueprint</b> .....                | 4  |
| <b>Step 1: Nail Your Nearbound Sales Math</b> .....       | 5  |
| <b>Step 2: Creating Your Nearbound Account List</b> ..... | 7  |
| Making the data work for you .....                        | 10 |
| <b>Step 3: Running the Nearbound Sales Plays</b> .....    | 11 |
| <b>Intel</b> .....  | 11 |
| How to get quality intel .....                            | 12 |
| <b>Influence</b> .....                                    | 13 |
| <b>Intros</b> .....                                       | 15 |
| Don’t f*ck it up .....                                    | 16 |
| <b>Partner Trust, Reciprocity, and Planning</b> .....     | 18 |
| Building more trust .....                                 | 19 |
| <b>Proactive Planning</b> .....                           | 20 |
| The 3x5 strategy .....                                    | 21 |
| Aligning up the chain .....                               | 22 |
| <b>The Results</b> .....                                  | 23 |

# Foreword

## The Emergence of the Nearbound Industry



**Jared Fuller**  
Chief Ecosystem Officer  
[reveal.co](https://reveal.co)  
[jfuller@reveal.co](mailto:jfuller@reveal.co)  
[linkedin.com/in/jaredfuller](https://linkedin.com/in/jaredfuller)

### It happened faster than I expected.

Nearbound has accelerated to the forefront of the B2B lexicon. With it have come many questions. Rightly so. The Nearbound Era has just started and most companies are still figuring out where exactly this motion fits and how to implement it.

In many ways, most sellers are playing sales on hard mode. Instead of getting the answers to the test, they celebrate the 1 in 100 times they randomly turn interruption into interest. Nearbound sales is about a *new way*, the fastest growing way this decade, to drive sales more predictably and easily.

But where the heck did it come from? And why now? What makes it so effective for sales?

Most importantly, how can you start doing it *today*?

## The Nearbound Era

Nearbound emerged from the outbound and inbound eras that preceded it. The outbound industry was born from the digitization of customer data to target customers.

Outbound allowed sellers to go direct through email and phones without “hitting the pavement”. Then came the Cloud, which opened customer data to workflows and applications.

The inbound industry was born from the automation of information through content creation to attract customers. Inbound allowed sellers to focus on accounts that had an identified challenge and exposure to the brand without targeting them cold.

Then came integrations, connecting vendors to customer data throughout the entire lifecycle of an account. Then we come to today. For the first time ever, individual databases became an ecosystem of networked databases between partners.

Nearbound enables sellers to instantly access *intel, intros, and influence* from the company’s network of partners and trusted relationships. And, just as importantly, Nearbound enables Partner teams to do what they do best:

### Help.

Partner teams can focus on building trust with partners and help their sellers leverage that trust. In the outbound and inbound eras, data was the new oil.

Now, in the Nearbound Era, *trust is the new data*.

And when trust is the new data, people don’t ask “how” to solve a problem, they turn to “who” they trust for the answer.

# From the “How” to the “Who” Economy

The world we live in is no longer a battle of information.

It’s a battle of *influence*. The *zeitgeist* today does not seek to answer questions of “how?” but instead “who?”. Buyers are no longer asking, “How do I solve X?” or, “Where do I find Y?”. They are asking, “*Who* has solved Z?”. They are leaning on those they trust.

Influence comes from trust and trust comes from those who help. We no longer have room for opinions or information. Not all opinions or information are equal.

We only have room for *proof*. We now ask, “Who has been to the place I am trying to go?” or, “Who can help me?”.

## In the old world of “how,” buyers would:

- Google to find solutions
- Compare product specs // review sites
- Evaluate company content
- Use information as the key
- Identify with products
- Find the best content to signal the winner



## In the new world of “who,” buyers now:

- Ask those they trust
- Vet others who have already accomplished the task
- Value relationships as the key
- Identify with advocates
- Find the best network to signal the winner

## And the evidence is overwhelming:

- Americans receive between 400-10,000 ad impressions per day (Deloitte)
- 80% of sales leaders say agencies, consultants, vendors, and individuals in their network have the biggest impact on a customer’s purchase decision (HubSpot)
- Deals that involve one or more partners have a 41% higher win rate and close 35% faster (Reveal)

In the old world, Google, the major ad platforms, and the companies who gamed them were the winners by gating the answers to “how” or “where”.

In the new world, influencers like Mr. Beast launch the world’s fastest-growing restaurant *and* candy company seemingly overnight by leveraging the trust built with his audience, aka, leveraging the “who”.

B2B is far from immune to this shift and, in fact, it’s disrupting GTM at a faster pace than ever before.

Let’s be brutally honest with ourselves. Do we believe that outbound or inbound will be performing any better in six months if we just get the right message to our prospects? No, we don’t. Because we don’t buy that way anymore.

I’ll give you an example: I drink Athletic Greens every morning. I have for years. Tim Ferriss, renowned entrepreneur, podcaster, and biohacker, turned me onto it. I drink it every day because he does. It has “75 whole food sourced ingredients”, as their common ads read.

And I couldn’t tell you a single one of them. I wasn’t searching for *how* to supplement my diet, I acted when *who* I trusted recommended a solution.

So, if that’s how we buy in the Who Economy, then how do we sell?

# The Nearbound Sales Blueprint

**Nearbound is not about ending outbound or inbound.**

As much as we all would've loved for inbound to end outbound (who doesn't love a demo request more than a cold call lead?), it augmented it instead. It diversified our revenue mix and brought more plays to the repertoire of reps for building and accelerating pipeline.

Nearbound offers the same.

The Nearbound Sales Blueprint is the dead simple way to operationalize plays from sellers that utilize partners into the revenue mix.

Maybe your current revenue mix is 50% outbound, 40% inbound, and 10% partner. And you know that you need to get to a healthier mix. Let's say  $\frac{1}{3}$  outbound,  $\frac{1}{3}$  inbound, and  $\frac{1}{3}$  Nearbound.

**How would you get there?**

The answer is far simpler than you think and why the **Nearbound Sales Blueprint** will be your guide to hitting your sales number this year and years to come.

The Blueprint is comprised of 3 steps:

- Nail your Nearbound sales math
- Attach partners
- Execute the "3 I's of Nearbound sales"

**Let's make it happen.**

# Step 01

## Nail Your Nearbound Sales Math

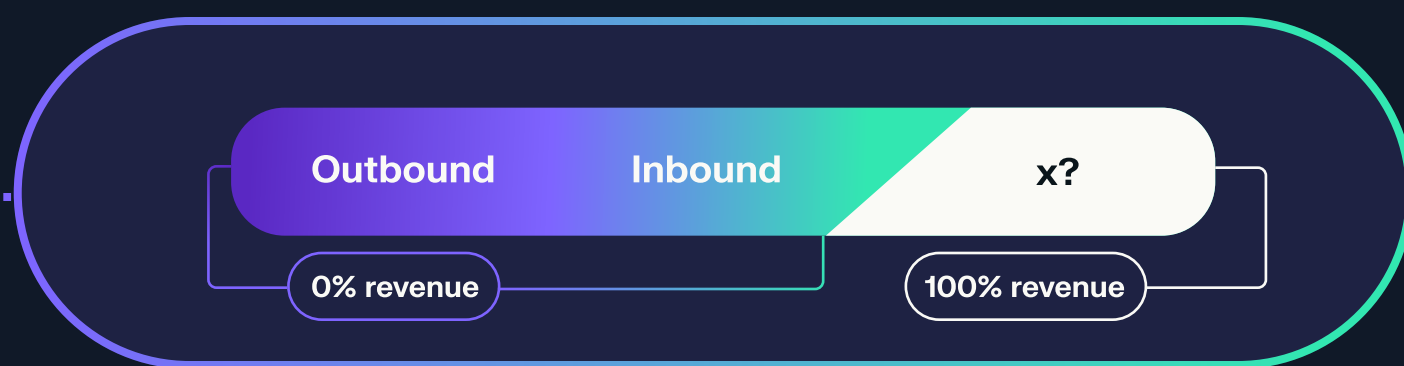
Let's use a simple example.

I am aware that not all activity is equal, but instead of splitting hairs, the following is provided solely as an example. Use your own sales math for outbound, inbound, and Nearbound to determine your own target revenue mix accordingly.

Outbound and inbound dictate your Sales team's activity but they're not enough to get to the target. Outbound and inbound represent  $\frac{2}{3}$  of your org's sales productivity despite taking up nearly 100% of your Sales team's activity.

Because you have yet to implement a Nearbound strategy, you are leaving  $\frac{1}{3}$  of the capability *untouched*.

Of course, you can't ditch outbound and inbound today, but you *can* carve out  $\frac{1}{3}$  of those activities to  $\frac{1}{3}$  of your accounts to achieve full productivity.



If we were to assume, for example, as a Sales Leader that your target revenue mix would be  $\frac{1}{3}$  outbound,  $\frac{1}{3}$  inbound, and  $\frac{1}{3}$  Nearbound, then your company should see:

- Roughly  $\frac{1}{3}$  of your **total open opportunities** should include partner presence
- Roughly  $\frac{1}{3}$  of your **total new prospects** should include partner presence
- Roughly  $\frac{1}{3}$  of the **total deals you close** should be with the help of the partner

**Partner attach rate is merely that:** the ratio of partners attached to an overall number. At the company closed won level (*output*) or at the individual rep activity level (*input*).

For Step 1, nailing your Nearbound sales math is as simple as the following scenario:

- Let's say your current revenue mix is 50% outbound, 40% inbound, and 10% partner
- You currently are producing 66% of your sales productivity
- Given your win rates and average sales cycles when partners are involved, you determine that your revenue mix should be  $\frac{1}{3}$  each for outbound, inbound, and Nearbound
- That means your target partner attach rate is 33% for every account assigned to a seller all the way through closed won

Is it that simple, really?

**Yes.**

It's *math*, not magic.

And executing your target partner attach rate of 33% is equally as simple when it comes to per rep execution:

- First, how many accounts are assigned to reps? In other words, how many accounts does each rep have in their book?
- Let's assume that reps own 100 accounts each quarter. That simply means that 33 of those 100 accounts should have partners attached where Nearbound sales plays can be executed.
- So, at the beginning of every quarter or period when accounts are assigned, the manager, the Partner Manager, and the rep sit down and determine the accounts with the most and most influential partner overlap to commit 33 of those accounts as Nearbound accounts.

**That's your Nearbound account list.**

# Step 02

## Creating your Nearbound Account List

Now that you have high-level alignment on your company's goals, your individual KPIs, and how your pipeline should look in a Nearbound model, it's time to operationalize it.

In the previous example, we said that a rep should have a Nearbound account list of 33.

Here's how:

The screenshot shows a CRM interface titled '360° Mapping'. It features a search bar at the top with 'Search Prospects / Customers', a '+ Invite new partner' button, and a 'Premium' dropdown. Below the search bar, there are filters for 'All sources', 'Columns', 'Filters 0', and 'Sort 4'. A summary bar shows 'All 915', 'Prospects without opportunity 518', 'Prospects with opportunity 10', 'Prospects 528', and 'Customers 232'. The main table is divided into 'YOU' and 'PARTNER' sections. The table columns include: Company name, Owner, Account type, Opportunity status, Is customer of, Is open opportunity for, Win Rate Multiplier, Revenue Multiplier, and Deal Size Multiplier. The table lists various companies like Burlington Sto..., Encore Capita..., Misys, Ss&C Globeop, Ald Automotive, Ebs, Microstrategy, The Citco Gro..., Duff & Phelps, Waterstone Mortg..., Rbc Wealth Mana..., and Travelex, along with their owners and associated partners like Levenue, Inters, iac, Tesoro, Skol, Intersect, and Vocalink.

» **First:** Sort the accounts with the *most impactful* partner overlap.

- The Account Executive is here to game plan, document, and ready their plays based on this meeting
- The Sales Manager is here to liaison, learn what partners are more or less effective over time, and hold their Account Executive accountable, as well as hold the Partner Manager to the same standard.
- The Partner Manager is here to help determine which partners have the best relationships surfacing details like:
  - **When the prospect became a customer** of a partner
  - **The strength and willingness** of a given partner
  - **The particular joint value proposition** of each partner
  - **Receive and give feedback** on previous Nearbound sales plays run by this rep with these or other partners in the past to improve
  - **Ensure that such notes are saved** with each account and each partner, in the notes of the account when the partner engagement is added to pipeline of partner engagement against that Nearbound account list

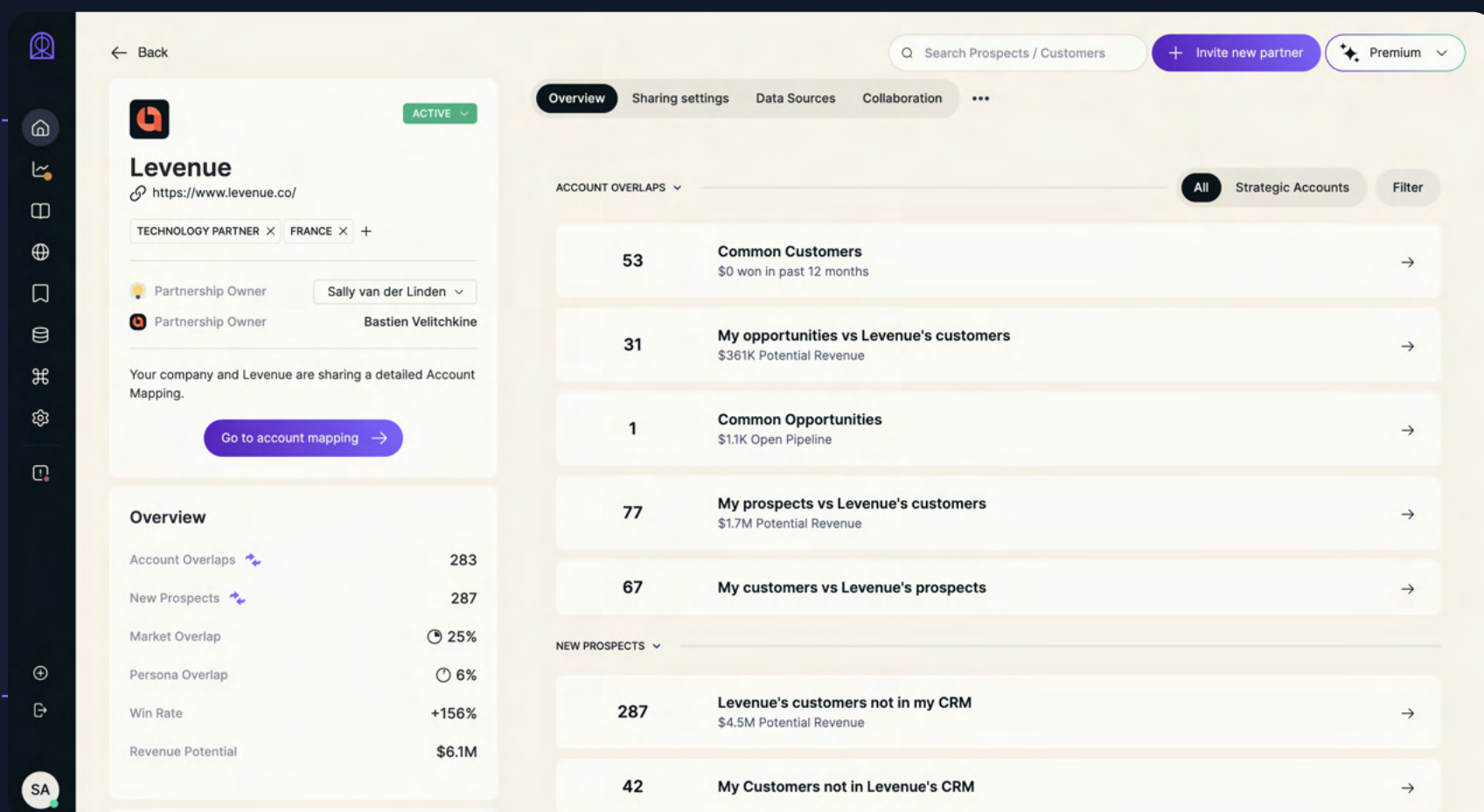


» **Second:** Identify which partners have the *most relevant signals* to run Nearbound sales plays against. Get curious to get the answers to the test.

- For example, maybe two integration partners of yours closed your target account in the last three months. What business initiative may have prompted those sales? Add those two integration partners to the partner pipeline, with this account now being added to the Nearbound account list.
- Maybe a partner just renewed your customer. **Ask why.**
- Maybe a partner has an open upsell opportunity. **What prompted that?**

The simple point of this meeting is to drill down into each partner with a relationship and find the signals that are the most relevant to surfacing intel, influence, or potential intros, and where the right partner contact might reside.

How is the Partner Manager on your team going to work their way into a conversation with an Account Executive, Customer Success, or Account Manager?



» **Third:** Find out *who* they have relationships with.

- What personas do you have on the account that you're talking to, and which ones do they have? Let's talk specifically about roles or departments.
- For example, you sell into Demand Gen, but every so often, the Marketing Operations department is the decision maker and/or blocker. For a particular account, you're in contact with Demand Gen over light email conversations, but they are keeping the Marketing Ops team away from you "because they are overwhelmed". And of course, they aren't willing to take a meeting until "they free up the bandwidth".

Which of your partners might be able to get that marketing ops team to show up?  
Or give the green light for Demand Gen to explore because someone they trusted said it's worth an evaluation?

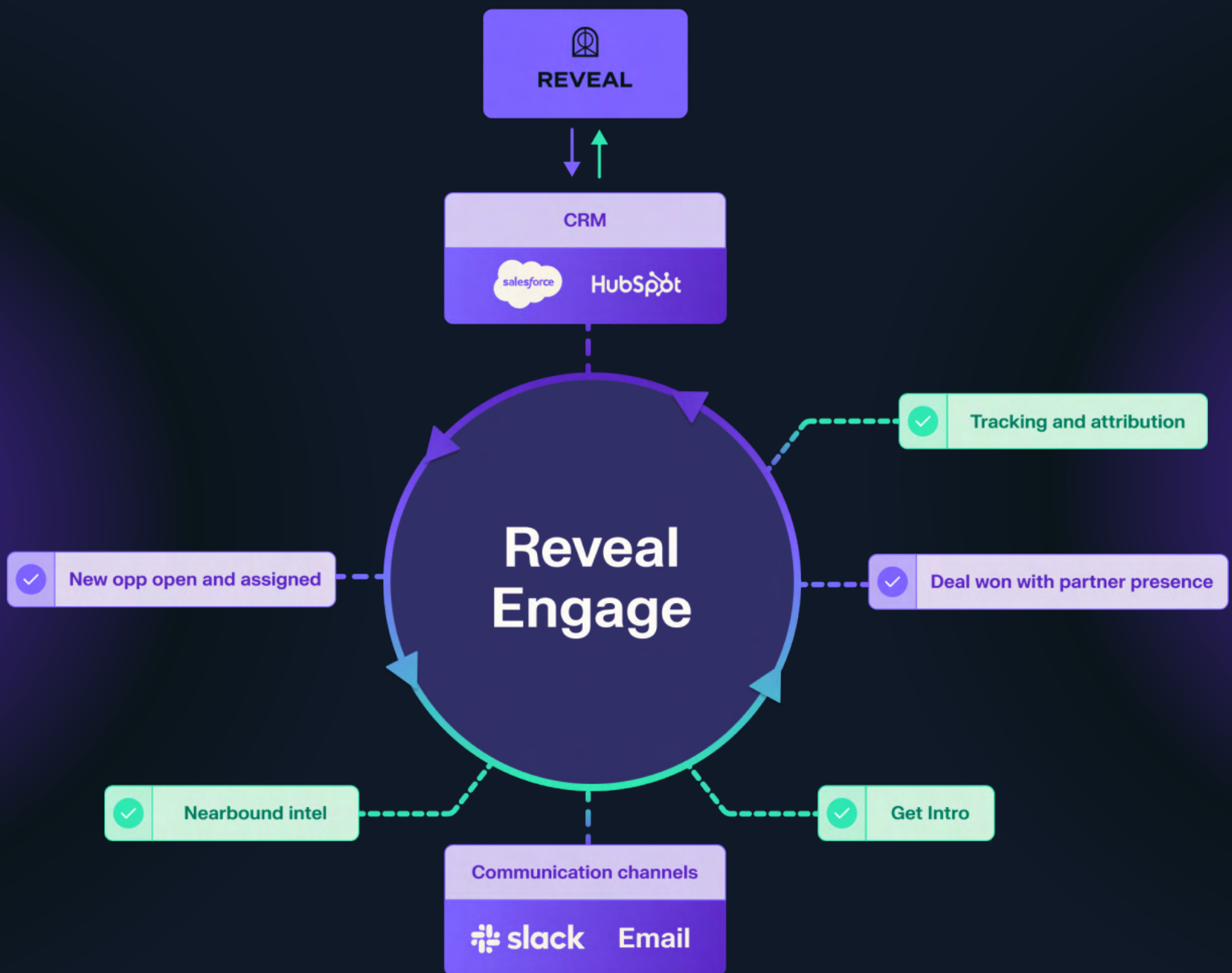
**Let's take Step 3 to a logical and common conclusion to make this clear.**

While using 360° Mapping to build your Nearbound account list, you might see that the partner recently closed a deal with the VP of Marketing Ops, a Senior Marketing Ops Manager, and a Marketing Ops Manager all as roles attached to their opportunity. This means this team is very likely working on implementing the solution they just bought. In this scenario, it's much wiser to get the answers to the test, or "intel", on why there is a disconnect in your approach. Have your partner contacts influence these contacts to take an evaluation of your solution seriously (and take that meeting they've been postponing!). Then get an introduction to one of the Marketing Ops personas.

Repeat this until you have identified the 33 accounts and the same number (*or more*) partners who you will work with to drive and accelerate pipeline faster than outbound or inbound could ever do alone.

We recommend doing this monthly or quarterly, depending on how often account books refresh and partner relationships move.

The key is to create an *actionable, measurable, and repeatable A-to-Z process* that both Partnership and Sales teams can execute to run Nearbound sales plays to hit the revenue target.



Obviously, building a Nearbound account list with 33 accounts out of your 100 is table stakes if you want to drive 33% of your revenue with partners.

But it doesn't have to stop there. Funnels and prospects move a lot. And so do partner relationships. You might build your Nearbound account list and, a week later, a top-friendly and helpful partner may close one of your target accounts.

So, don't forget to take advantage of these signals as they happen in real-time.

With [Reveal Engage](#), for example, ecosystem data is proactively prioritized and sent to AEs every time an account is assigned or a partner has a key event with one of your targets. This data is sent via email and Slack, as well as lives directly in CRM (*Salesforce and HubSpot*).

AEs can directly leverage this data where they live to attach partners when it may be most relevant. Partner Managers and Revenue Operations can control how and when these notifications and partner engagements can occur, even on an account-by-account basis.

And the best part is that every single action taken by the AE is tracked in the CRM, ensuring that partner-attributed data is never missed when it happens organically in real-time.

## Making the data work for you

Here are a few more examples of how to make the data you're receiving from partnership teams work for you by creating automated sequences, tasks, and (*with Reveal*) Slack notifications:

- **When your prospect is a customer of your partner(s)**, you can trigger an automatic email sequence that educates the prospect about how your technology and your partner's technology complement each other
- **When an open deal is an open deal of your partner(s)**, you can create a task for an AE to reach out to the partners to strategize a co-selling opportunity
- **When a cold lead is an existing customer of your partner(s)**, you can send a Slack notification to an SDR with a list of partners they can reach out to for intel or introductions

Setting yourself and your pipeline up for success from day 1 can be done easily. Connecting your entire ecosystem to your Nearbound Revenue Platform will help supplement the hard work being done by Partner and Sales teams before and after Nearbound account lists are built.

# Step 03

## Running the Nearbound Sales Plays

**Warning:** Based on the data of over 10,000 companies on the Reveal network, running Nearbound sales plays will result in:

- Increasing the number of open opportunities by 33%
- Increasing win rates by 41% or
- Reducing time-to-close by 43%
- Decreasing your CAC
- Increasing productivity per rep

**What are these plays?** I call them “The 3 I’s of Nearbound sales” and they are the Nearbound sales plays that power this playbook:

### Intel

Gather additional intel from those who have trusted relationships with prospects. Things like:  
Who holds buying power?  
What is the procurement process like? What about the political landscape in the organization?

### Influence

Mature the Nearbound play by sharing and getting influence on opportunities that you have in flight. Surround prospects with influence to encourage and influence key contact(s) you share to move forward with a purchase.

### Intro

Ever been introduced to someone by your friend? You’re immediately more warm to that person and conversation is fast tracked. Your partners can introduce you to their clients that are your prospects for an easier conversation.

## 01. Intel

**The first of the 3 I’s is intel.** Intel is any information that your partners and/or partnership technology can provide you about an opportunity. It can look like:

- The best point of contact in your prospect’s company, including champions, decision-makers, and even blockers
- What technology the prospect is already using. Integrations with existing tech are a top priority for 76% of buyers (E&Y)
- The prospect’s top pain points and how they speak about them. Remember, buyers are more likely to engage with brands that echo the language they use in their own operations
- New initiatives and goals in the prospect’s organization. If they are pivoting, it’s because they either have a problem that’s causing them to do so, or see an opportunity they want to go after.  
**How can you help them get there?**

**This is worth repeating:** when it comes to accelerating your pipeline, intel is the gas pedal. This is where every seller should be getting the answers to the test.

**Why?** Because this trusted information has already been earned by your partner. In other words, this is intel that they aren't giving out to just anyone. Gaining this information helps you position yourself and your strategy alongside those companies your prospect has established relationships with.

## How to get quality intel

Now that you know what intel you need and why it's important, let's break down how to get it:

- **Use what you know:** Analyze your data from a tool like Reveal to find partner presence. Leverage the relationship you have with your partner and what you know about them to draft a value proposition. For example, you know your partner provides X solution. You know the major pain points of your partner's audience. How can you develop messaging that explains how your solution uplifts the processes they already have in place with your partner's technology?
- **Help first:** You might not yet have the intel you need on a prospect, but you know that the prospect is a long-time customer of your partner. You also know that one of your customers is a prospect of that same partner. Reach out to partner with *valuable intel* on the account they're going after. Help them, then ask for what you need.
- **Pull from the collective knowledge:** Don't rely on the intel of just one partner. By using 360° Mapping in Reveal, you can see every partner that has a relationship with that prospect. *Mine intel* from each partner you have a good relationship with to get a holistic view of the prospect's objectives and pain points.

But at the end of the day, you gotta ship an email or DM to the partner.

The Partner Manager's job is to get that message to the right person on the partner's team, be it a fellow Account Executive or someone on the Customer Success side. It's the AE's job to make the outreach as clear and easy to act on as possible.

**Here's an "intel" email template you can steal right now.**

Hey [Partner name X],

I'm talking to [Contact Y] next week over at [Account Z]. I noticed you closed them last quarter with buy-in from the [A department].

So that I'm presenting the most relevant case about our [joint value proposition of B], would you be willing to share any intel about the business initiative you aligned to?

A few of your top bullets would be extremely helpful.  
Respectfully,

[Rep Name]

P.S. Or if you're open to hopping on a call for 15 minutes, maybe I could offer up some intel from my side on the [C account(s)] you're selling to. I owned these opportunities and would be happy to trade notes.

**The intel play can be used at any stage of a sales cycle to build or accelerate pipeline.**

In fact, one of the most anti-partner reps I've ever worked with was finally flipped to Nearbound sales when he learned the power of the intel play in a remarkably simple way.

**What did he do?**

He got the answers to the test on navigating procurement in every single deal. He found the partners that sold the biggest, most complex deals, and he got the intel on exactly how to beat procurement before procurement beat him.

**What did it result in?**

The *highest win rate* in the Enterprise segment with the highest ACV out of dozens of reps.

Funny, who would have thought having the answers to the test before you take it gives you a shot at a higher score?

## 02. Influence

Influence is everywhere and is the center of the Who Economy. Using the influence play of Nearbound sales is the best way to tap into it through your company's trusted network of relationships.

At the [Nearbound.com](https://nearbound.com) announcement of the acquisition of PartnerHacker by Reveal, Jay McBain stated:



 canalys

“We know that the average B2B customer has *28 moments* before they make vendor selection. And in the two decades of inbound and outbound, the average company might get into 4 of those moments towards the end. The other 24 moments are owned by others, and in most of those cases, those 24 moments are owned by others that are not partners of yours.”

**Jay McBain**  
Chief Analyst of Channels, Partnerships and Ecosystem

This means there are at least 24 moments in the buyer's journey where vendors have a shot to gain insight and influence through partnerships. This is an enormous amount of untapped opportunity; it's buried treasure and Nearbound is the map to get there.

What distinguishes Nearbound from inbound and outbound is the possibility *and* ability to surround the remaining 24 touch points of the buyer's journey with partner influence.

Surrounding your prospect with influence from their trusted service providers and community members is how your organization sees that example 33% attach rate turn into more than 33% of revenue.

**Here's an "influence" email template you can steal right now.**

Hey [Partner Contact Name—AM],

I'm talking to [Opportunity Contact] over at [Opportunity Account] next week.

I noticed [they just renewed with you] last quarter. They mentioned in their last call how important [Company Name] was to [their strategy].

A part of the success plan I put together for them next week is our [Integration]. This is my first time talking with their [Contact Title] and I wanted to see if you'd be able to put in a good word with [Contact Name] about our partnership and the [Integration] over email or a call prior to then?

If so, I put together an email below that you can use that should highlight our joint value proposition.

Take a look and if you don't mind sending it over, will you let me know?

In partnership,  
[Seller Name]

[Email to be forwarded copy]

P.S. It looks like you share a couple of accounts with upsell opportunities that I recently sold as well like [Account Name 1 & 2]. Happy to discuss or help there if that's valuable, just lmk.

This email is a play AEs can leverage right now, today, on their Nearbound account list. It's not quite a referral, it's not quite outbound, and it's certainly not channel.

**It's Nearbound.**

There are dozens of permutations of similar templates or scenarios you can use, develop, or tweak. Yes, of course, it takes a little prep and a little practice to get these messages in front of the right partner contacts to influence the right account contacts.

But so does sending personalized and researched outbound emails. And it's certainly no more work than a good outbound email.

So, which would you rather work on? The one with a 1 in 100 chance? Or the one with a 1 in 3 chance?

Like everything in the Nearbound Sales Blueprint, *the math is simple.*

**Your choice should be, too.**

## 03. Intros

**This brings us to the 3rd I—introductions.** The holy grail. The best to get but the most sophisticated to execute.

Before I begin, let me make something abundantly clear: the most surefire way to never get an intro is by only asking for a referral.

By using the intro play, you are leveraging trust at its highest level with your partner as a seller. This is also the perfect opportunity to point back at what I said in the foreword to this guide:

Nearbound enables Partner teams to do what they do best: **Help.**

Partner teams can focus on *building trust with partners* and help their sellers leverage that trust.

You might even call it “spending trust”. This is precisely why Partner teams should be focused on creating and building trustworthy partner relationships and reciprocity, and sellers should be the ones acting on that work.

Because when using the intro play, you’re no longer the pesky, untrustworthy corporation filling up the prospect’s inbox with automated emails. Now, you’re being ushered into the conversation by a community member the prospect trusts.

Trust that inherently gets transferred to you, *if done correctly.*

But tread lightly. That trust is tentative. So, in the words of the CEO who taught me the most, David Cancel, “Don’t f\*ck it up”.



## Don't f\*ck it up

Here are some tips on how to get the most out of the intro play and not destroy the relationship with your partner before you ever get to leverage their trust with your prospect:

- **Come prepared:** There is no winging it when it comes to meaningful introductions. You should have the intel you need to *speak confidently* about the ways you are going to make that prospect's operations better. Get that value proposition honed in before you even ask for the introduction.
- **Be ready to help:** The trust the partner has earned with the prospect is not something they will be willing to transfer to just anyone. Make it clear that you understand the value of your ask and be willing to give them the same.
- **Care about what they care about:** When you get an introduction with the prospect, have a clear understanding of that contact's role and their individual needs. How is your solution going to improve their work as well as their company's success?
- **Have a strong value hypothesis:** Nail why this account and contact you are trying to break into needs you. You have a very short window of opportunity to get their full attention, don't waste it on materials that don't apply to them.
- **Make it easy for them:** Never, ever, ever ask for an intro where you have not already written an example intro for the person you are asking for an intro from.

With those tips in mind, let's get that intro.

**Here's an "intro" email template you can steal right now.**

Hey [Contact Name],

I've been in comms with [Prospect Contact(s)] over at [Prospect Account] the past [few weeks].

I noticed [your relationship] with [Prospect Contact(s)], who I am trying to bridge the conversation over to.

I am positioning [value proposition] as the reason for that conversation with them.

Given your relationship, I'm reaching out with a draft email based on your feedback for an intro. I put a first draft with context on our previous comms below.

Take a look and if you don't mind sending it over, will you let me know?

In partnership,  
[Seller Name]

[Email to be forwarded copy]

P.S. It looks like we might share a handful of accounts/contacts I could Intro you to as well I recently sold in [Relevant Industry Name]. Happy to discuss or help there if that's valuable, just lmk.

The beauty of this play and template is that it can be used for partners, customers, employee networks, advisors, investors, communities, and influencers—in other words, the total network of your company.

Just like the influence play before it, it does require a little work. But guess what?

**So does trust.**

When you are spending your partner's trust, show up proudly with the little bit of work that proves you are worthy of asking for theirs. Effort is what will get you more intros and more sales more of the time.

The intro play *isn't a referral*, but I would argue that it's the most powerful play in all of sales and the most effective use of my time today.

Yes, it takes a little practice to use this play more often than the others. And not all accounts or partners will be able to break you in, no matter how well you write an email.

That's why there is a feedback loop on the Nearbound account list with the AE, the Sales Manager, and the Partner Manager, to improve the process each time.

I've honed this method so well over the years that 50% or more of the emails I write are emails for other people to send. Practice makes perfect. If done right, you'll never think about selling the same ever again.

**And that's the Nearbound Sales Blueprint.**

How to set a target, attach the target, and run the activities to hit the goal.

Welcome to the Who Economy and Nearbound Era. May *trust* be your *greatest* asset.

**Your company is counting on you.**

# Partner Trust, Reciprocity, and Planning

This section is more oriented toward the Partner team, but every seller who wants to know the full picture should read on.

We've talked about what we can get from Nearbound, but it's important to learn how to sustain its power.

If your Sales team is spending all this trust equity, how do you build it and replenish it before the well is dry?

If you want to keep reaping the benefits of the Nearbound Sales Blueprint, you must ensure that you are helping as much as you're asking. Reciprocity replenishes trust. Helping first builds trust.

I once had a great conversation with Jeremy Seltzer, the CRO at Movable Ink. He told me:



MOVABLE **INK**

"I want to get a whole heck of a lot from my partner ecosystem, which means we got to give a whole heck of a lot."

**Jeremy Seltzer**  
CRO

That's the difference between junior varsity and the majors.

To get to the big leagues is to fully adopt what [Adam Pasch, Head of Partnerships at Improvado](#), calls a Give-First Mentality. Partnership leaders have to approach each relationship with the mindset that they want to be known as the most helpful partner around, especially if their Sales team is to spend that trust at scale. Adam explains:



improvado

"It *has to be* a give-first mentality. It's funny but sometimes with our partners, we have this give-off, where I'm trying to give and they're trying to give, and eventually we're like, *wait a second!* Someone's gotta take something here. That's the moment when you know *exactly* how to help the partner."

**Adam Pasch**  
Head of Partnerships

In the same way that Nearbound helps build long-term trust with your customer base, it also should build long-term trust with your partners. This ensures that your partners will not just be willing to help influence your sales cycle, but that they will be *excited* to do so.

## Building more trust

The first step in building long-term relationships with partners is to make sure you know exactly *what* they need. This requires aligning key goals and KPIs from the onset of your partnership.

Do this to ensure alignment and mutual benefit:

- **Get crystal clear on the value you can bring.** Stay authentic and honest in your deliverables, as well as help you choose the right partners.
- **Have clear joint value propositions:** Why do customers choose you? Why do they choose the partner? Why do they like doing so together?
- **Understand their company-wide and department-specific goals.** Document the ways your company and program can help them win in those goals.
- **Show them what you've already done for them, not what you can do.** Go after that low-hanging fruit and give them a win yesterday. Prove that you're serious about building a long-term, reciprocal relationship.
- **Set up short and long-term goals with the partner.** Partnerships take *time* before they reach their full potential, but there are always ways of moving the needle from the very beginning.
- **Check-in regularly.** Get their feedback on your program and deliverables, and pivot as needed. Update your goals as the partnership grows. Partners stay in relationships where they feel heard and respected.
- **Make them famous!** This is often overlooked in partnerships, but it's one of the easiest ways to build trust.
- **Go the extra mile.** If you see an opportunity in your ecosystem, such as another partner that you think would be beneficial to your original partner, get them connected. Show them that you're keeping them top of mind; they will want to do the same for you.

# Proactive Planning

**Not all partnerships are created equal. We know this.**

At the end of the day, you should be able to tie *mutual value* to all partners, but there will always be varying levels of benefit between partnerships.

Partner Managers are not machines. They have a limited amount of time and resources to spread across the entire program. They must be able to divide up their resources strategically. For example, they might reserve weekly check-ins to collect feedback for top-tier partners, and send monthly feedback surveys to bottom-tier partners.

You have to understand which partners provide the highest value and proactively plan your partnerships and sales strategies around those top-tier partners that will catapult your Nearbound strategy tenfold.

Come back to your Nearbound data. Ask yourself these questions:

- Who am I sharing multiple Partner Signals with?
- Who has new and valuable intel, such as high-level and applicable contacts for key prospects?
- Who is leading in markets that are included in my KPIs?
- Who is aligned with my company's values?
- Who is embodying a give-first mentality?

The screenshot shows a CRM interface with a 'Pipeline > All partners' view. At the top, there are filters for 'All time', 'Mine', 'Team', and 'Partner', along with a search bar and 'Invite new partner' button. Below the filters, there are three summary cards: 'Sourcing' (\$5.4K, \$0, \$2.2M, Win rate: 10%), 'Influence' (\$0, \$0, \$48K, Win rate: 11%), and 'Other' (\$0, \$0, \$0, Win rate: -). A table below lists various partners with columns for Company name, Partner manager, Status, Owner, Partner, Activity date, Stage, Type, Com..., and Opportunity. The table includes rows for Freedom Mortg..., S&C Glo..., Hot Topic, Microstrat..., Dealertrack, and Encore C... with details on their status and associated opportunities.

| Company name     | Partner manager  | Status   | Owner              | Partner   | Activity date | Stage          | Type      | Com...           | Opportunity       |
|------------------|------------------|----------|--------------------|-----------|---------------|----------------|-----------|------------------|-------------------|
| Freedom Mortg... | SN Shivam Naruka | Customer | VJ Vincent Johnson | Levenue   | --            | Closed         | Sourcing  |                  | \$100 Prospectin  |
| S&C Glo...       | ND Noémie Goubin | Prospect | JG Jamie Gullbrand | Intersect | --            | Meeting booked | Sourcing  | Insights Next... |                   |
| Hot Topic        | ND Noémie Goubin | Prospect | TM Taylor Martin   | Levenue   | --            | Closed         | Sourcing  | INSIGHT NEXT...  |                   |
| Microstrat...    | ND Noémie Goubin | Prospect | TM Taylor Martin   | Tankle    | --            | Opportuni      | Influence | Next steps ...   | \$9K Prospectin   |
| Dealertrack      | AV Alison Vavra  | Prospect | VJ Vincent Johnson | Levenue   | --            | Intro made     | Influence |                  | \$5.7K Prospectin |
| Encore C...      | AV Alison Vavra  | Prospect | VJ Vincent Johnson | Levenue   | --            | Intro          | Influence |                  |                   |

In Reveal, you can easily identify these partners by using 360° Mapping and then adding partners who meet these criteria to the Pipeline feature. This will help both Partnerships and Sales collaborate in the CRM on the prospects gleaned from that partner.

**Partner people, remember:** just because you aren't the one executing the Nearbound sales plays doesn't mean you shouldn't take part in helping put numbers up on the sales board.

The 3x5 strategy is a very simple way to both build and leverage trust for Sales at the same time.

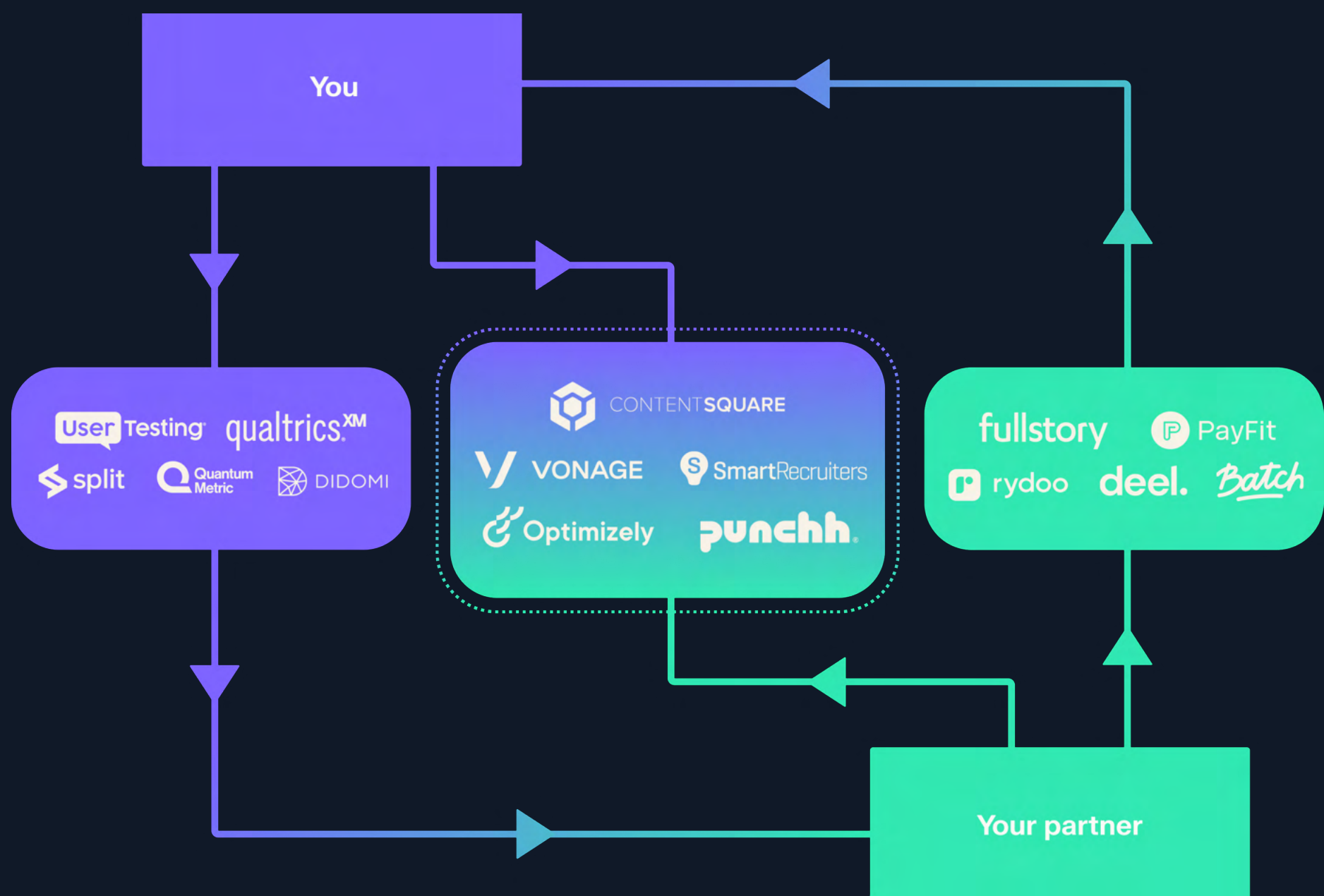
**Happy partner = happy sellers = happy you.**

## The 3x5 strategy

Once you've identified and prioritized key partners, be proactive in planning your mutual benefit with that partner.

One way to do this is with the 3x5 Strategy:

- You share five of your accounts that are prospects of your partner
- The partner shares five of their accounts that are prospects of yours
- You both collaborate and co-sell on five mutual opportunities

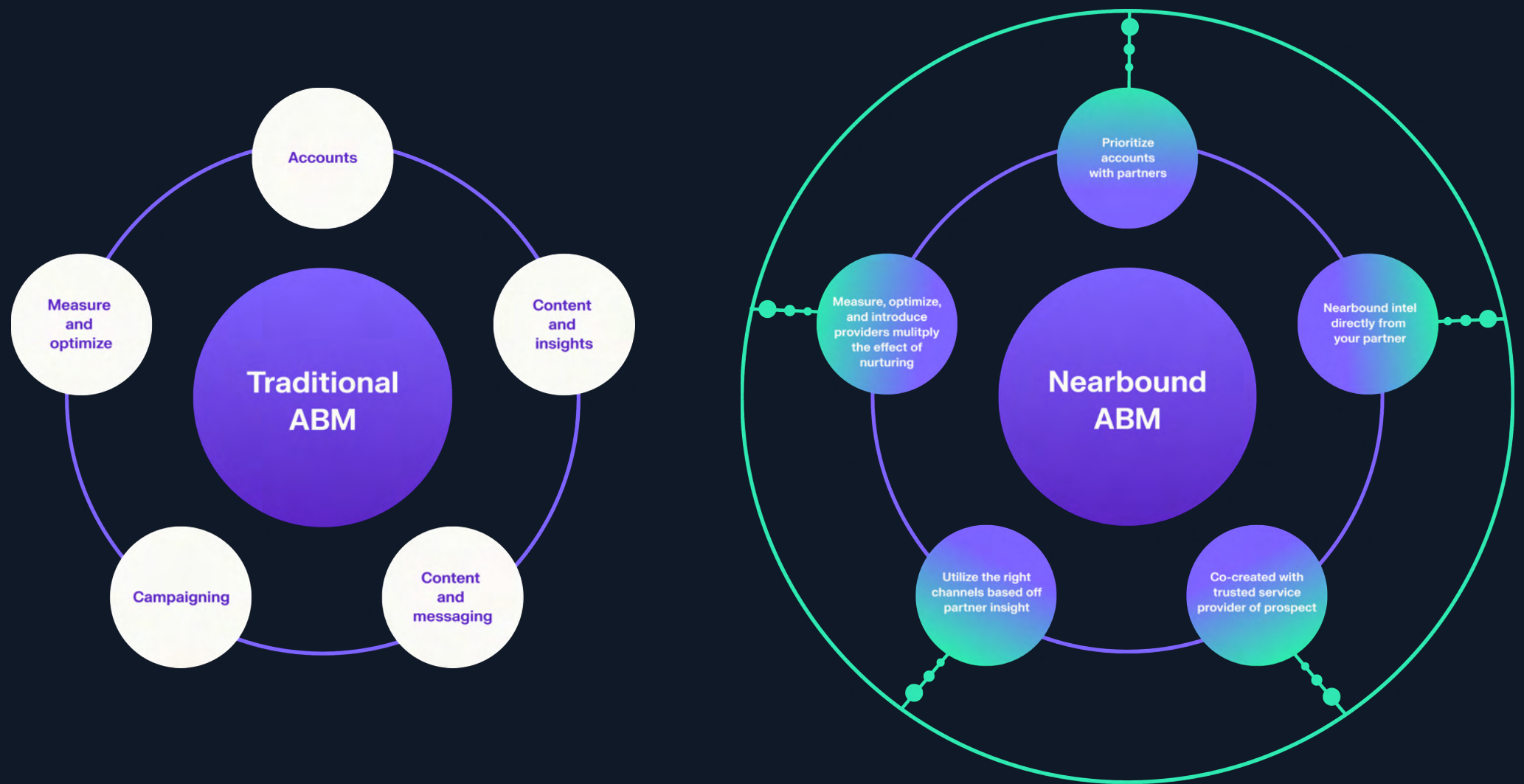


This is a great exercise to bring Sales Leadership at both teams into your most strategic shared accounts.

Sales Leadership, Partner Managers, and Partner Marketers should collaborate on these accounts to:

- **Develop succinct messaging** and materials applicable to those accounts using Nearbound intel
- **Create co-marketed campaigns** that specifically target these accounts
- **Create honed-in value propositions**, demos, and pitch scripts
- **Ensure that partners are getting wins** on the accounts you've shared with them

**This will operate like a mini Nearbound ABM strategy.** You will use intel, introductions, and influence at each stage of the buyer’s journey to win these specific accounts and help your partner do the same.



## Aligning up the chain

The 3x5 strategy can be an effective rep-to-rep strategy for strategic reps, but it’s also important to proactively plan for executive alignment. Your strategy should include not just AE-to-AE collaboration, but also VP-to-VP.

Augmenting territory alignment is the best way to accomplish this. For example, after a few months of your AEs using a Nearbound strategy on their accounts, you begin to see that two of them excel at working with a particular partner. They close every deal that this particular partner influences.

This is how executives can collaborate together to get more strategic. They can decide to put the AEs with high success levels on these joint accounts permanently.

This is something I did when I worked at Drift. I put two AEs I saw succeeding on all of the 6Sense accounts, and they did the same. By doing so, 6Sense’s leadership and I were aligning on the long-term strategy of winning together and showing our commitment to this goal by redirecting our high-level resources.

Think back to our beginning example of having 100 accounts and not knowing what the heck to do with them.

- **First, we asked:** How do I prioritize these accounts?
- **Then we asked:** What plays can I run to leverage the “3 I’s of Nearbound” on these accounts?
- **With leadership alignment, you’re now asking:** Where can we go from here? You’ve seen the success, you’re seeing the patterns, and now you’re working together to leverage it for the long run.

# The Results

## So, what will the results look like if you follow this Blueprint?

Your organization has prioritized 1/3 of your deals this quarter using Nearbound plays and the 3x5 strategy.

And when you look at the data, you notice something incredible about these deals:

- You saw a 2-3x higher win rate
- You closed them 35% faster than the other accounts
- You decreased your total CAC
- You increased your overall deal size on partner-influenced accounts
- Using Reveal with your CRM as a source of truth, you were able to accurately track Nearbound impact, making it easier for Sales and Partnerships teams to collaborate

This isn't rainbow-and-butterfly fiction. This is a very real and attainable goal that hundreds of companies have already made happen by adopting a Nearbound strategy and Reveal.

For example:

- [PayFit](#) had an increase of up to 60% in lead-to-demo conversion rate and an increase of up to 50% in demo-to-customer conversion rate
- [Rydo](#) had a 3x increase in pipeline
- [Contractbook](#) generated 2x to 3x more demo meetings
- [AssessFirst](#) had an increase of 4x in client integration and increased their lead generation by 100%

**Nearbound isn't just a strategy.** It's a motion that's changing GTM *forever*.

Welcome to the Nearbound Era, where trust is the new data and buyers are asking 'Who?', not, 'How?'.

If you partner with those your buyers already trust for intel, intros, and influence, you have a chance to *lead the pack* and *outpace your competitors* still stuck throwing more resources at outbound and inbound alone.



## We'd love to help you implement a Nearbound strategy.

Book a call and we'll help you source  
your first partner deal for *free*.

I'm ready to win with Nearbound



[Or send me a direct message on LinkedIn](#)