



App Partner Playbook

A playbook for solutions partners on why and how to collaborate with app partners in the HubSpot ecosystem



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Introduction

Modern businesses will succeed using a blend of solutions and applications. The typical organization has [7 different vendors or service companies they trust](#) and is [using over 130 different software applications](#).

At this point, businesses being able to seamlessly deploy a number of software products and services is more than just a nice-to-have -- it's [key](#) to growth.

HubSpot solutions partners are critical connectors and implementers in the HubSpot ecosystem.

Collaborating with app partners enables solutions partners to craft holistic offerings that best meet the needs of every client. It also builds new roads to market.

This playbook is for:

Emerging Connectors:

Those who have embarked on the path of addressing customer challenges by integrating or customizing a suite of apps on HubSpot without formal partnerships with app companies.

Selective Collaborators:

Partners who, in addition to the above, have selective partnerships with a handful of app companies to enrich the solutions they provide and jointly go to market.



Ecosystem Pioneers:

Visionaries looking ahead to launch a structured app partner program, aspiring to broaden the horizons of collaboration and innovation.

Solutions partners can use this playbook as a go-to resource for how to build effective collaborations with app partners across each of these phases.

By building successful partnerships with app partners, solutions partners can close more deals, build brand equity, and provide a better customer experience.

Section 1

Why Work with Top HubSpot App Partners



App installs increases customer retention and satisfaction



Better customer experience



Acquire net-new logos



Build out new service offerings



Commission revenue



Solutions Partner highlight



**Our partner ecosystem
generates a related monthly
pipeline that exceeds six
figures.**

Jen Spencer, CEO

SmartBug.



App Installs Increase Customer Retention and Satisfaction

[Studies show](#) that more integrations a software user installs, the higher their retention rates and the more they are willing to pay for the core product. Deloitte [has found](#) that partners help achieve not just short-term revenue goals, but also long-term objectives such as customer retention, renewal, upsell, and brand loyalty.

Businesses installing more apps on their HubSpot portal can lead to deeper product usage, more value out of the product, and higher customer retention.

Take [Gong](#), for example, which records and analyzes sales teams' calls to recommend how to optimize sales team performance. By ingesting HubSpot's data into Gong, the tool can provide analysis on what behavior drives more closes, and reps can see call summaries inside HubSpot to better prepare for calls.

Similarly, with the [ClickUp app](#), a business can build a HubSpot workflow to create a set of tasks in ClickUp when they receive a customer support ticket. The tasks can then be automatically completed when the ticket is resolved and vice versa.

This added data and functionality from these apps makes HubSpot more powerful so customers can meet more of their business objectives with less manual work.

Section 1.1

By becoming knowledgeable about pain points key HubSpot apps solve, solutions partners can recommend and implement them to their clients to solve complex problems. They can also provide additional services to maintain and optimize these apps, leading to better customer outcomes and satisfaction.

For example, with Gong, an agency can add additional services around optimizing sales operations or driving better performance amongst reps. Apps provide an opportunity to deepen existing services and expand their scope, which leads to a customer who can achieve better business results.

Better Customer Experience

Forming a closer partnership with app partners can enable better and quicker customer support. Having a direct line of communication with an app partner makes it easier to proactively architect solutions and reactively address any customer issues.

App partners in the HubSpot ecosystem bring technical expertise on their own product, insights into the area of the business their app serves, and their own relationship with shared customers. Partnering with app partners benefits your customer in a number of different ways:

Streamlined Communication and Support:

Establishing a direct communication channel with app partners leads to more efficient problem-solving and support. This enables quicker responses to customer queries and issues, ensuring that problems are addressed promptly and effectively.

Technical Expertise and Product Insights:

App partners possess specialized knowledge about their products. By working closely with them, you can leverage their technical expertise to gain deeper insights into the app's functionalities and capabilities. This knowledge is invaluable in tailoring solutions that fit your customers' unique needs and enhancing the overall utility of the app in their business processes.

Section 1.2

Proactive Solution Development:

Collaboration with app partners enables you to be more proactive in developing solutions. By understanding the strengths and limitations of the app, you can anticipate potential challenges and work with the partner to devise preemptive strategies, thus reducing the likelihood of customer issues arising in the future.

Customized User Experience:

Through a close partnership, you can provide feedback to the app partner based on your clients' experiences and needs. This allows the app partner to make adjustments or add features that specifically address these needs, leading to a more customized and effective user experience.

Integrated Approach to Customer Challenges:

A close relationship with app partners means you are better positioned to understand the broader context in which customers use the app. This allows for a more integrated approach to addressing customer challenges, where solutions are not just about the app in isolation but its role within the customer's overall workflow and digital ecosystem.

Shared Knowledge and Learning:

Regular interaction with app partners offers opportunities for shared learning. By exchanging insights about market trends, customer feedback, and technological advancements, both parties can enhance their understanding and improve their offerings.

Section 1.2

Faster Issue Resolution:

In case of any issues with the app, having a direct line to the app partner means these can be resolved quickly. This is crucial for maintaining customer satisfaction and trust, as well as minimizing any disruption to their business operations.

Building Trust Through Collaboration:

By showing that you are actively collaborating with app partners to enhance their experience, customers are more likely to trust your services. This trust is fundamental in building long-term relationships and customer loyalty.

By collaborating directly with an app partner, it is easier to optimize their app's performance and usage, share information about an account, and address any customer challenges with a fast and more effective resolution. Having connections across a customer's tech stack positions you as an industry leader with deep knowledge in your domain.

Acquire Net New Logos

Co-marketing and co-selling with select app partners can lead to new leads and customers.

SaaS companies often have significant marketing expertise and large marketing budgets. Co-marketing with app partners helps solutions partners to get in front of a larger audience and expend fewer resources. Showcasing a better-together story brings relevant service offerings to a whole new audience.

When done well, co-marketing with app partners can result in lead acquisition and new customers that convert from joint campaigns.

Co-selling with app partners is an opportunity to send each other referrals and increase win rates. App partners bring solutions partners in on deals to present a more comprehensive solution or remove blockers to purchase. Solutions partners can recommend apps when they solve a key prospect problem.

New logos can also be acquired when app partners recommend solutions partners to their current customers who may be struggling to optimize the app's usage.

Build Out New Service Offerings

By aligning with top app partners, solutions partners can sell more services as well as develop new services to offer clients. This can be accomplished by focusing on a few key areas of strategic collaboration and innovation:

Service Expansion Through Partnership Insights:

For example, by partnering with top apps like [Gong](#) or [Aircall](#), agencies can expand their service offerings. For instance, a partnership with Gong, which focuses on sales intelligence, can lead to the development of advanced sales process optimization services. Similarly, aligning with Aircall, a cloud-based call center software, can enable an agency to offer comprehensive Revenue Operations (RevOps) services focusing on telecommunication strategies.

Identifying Common Customer Pain Points:

Regular interaction with app partners provides insights into common challenges faced by customers. This understanding can be leveraged to develop new services that specifically address these pain points. For example, if customers frequently encounter issues with integrating call data into their CRM systems, an agency can develop a specialized service to streamline this process.

Section 1.4

Feedback Loop Integration:

Establish a structured mechanism for collecting and integrating feedback from both partners and customers. This could include regular surveys, feedback sessions, or incorporating feedback tools within the app itself. Analyzing this feedback helps in understanding how customers are using the app and the challenges they face, which can then inform service development.

Collaborative Problem-Solving Workshops:

Organize workshops that bring together customers, your team, and the app partner's team. These sessions can be focused on brainstorming solutions to common challenges, exploring new use cases, and discussing potential service offerings. This direct interaction fosters a collaborative environment and generates valuable insights.

Customer Journey Mapping with App Integration:

Map out the customer journey with the app integrated into their processes. This helps in identifying potential gaps or areas where additional services could be beneficial. For example, in a sales process, identify stages where Gong's insights could be further leveraged to optimize sales strategies.

Developing Combined Expertise:

Train your team to develop expertise not just in HubSpot, but also in how it integrates and works with these top apps. This combined expertise enables your team to offer more holistic solutions that leverage the strengths of both platforms.

Section 1.4

Case Studies and Success Stories:

Document and analyze success stories and case studies where the integration of these apps with HubSpot led to significant improvements for clients. This not only serves as proof of concept but also provides a framework for developing similar services for other clients.

Innovative Service Packages:

Create service packages that combine your expertise in HubSpot with the functionalities of the partnered apps. For instance, a package might include sales process optimization using Gong's insights, coupled with CRM integration and data analysis services.

Continuous Learning and Adaptation:

Stay updated with the latest developments in both HubSpot and the partner apps. Attend training sessions, webinars, and industry conferences. The evolving nature of technology means that services will need to be continually adapted and updated.

Feedback-Driven Refinement:

Use the collected feedback to refine and improve services continually. Feedback should not only inform the development of new services but also the enhancement of existing ones.

Working closely with top apps to enhance, optimize, and manage the app can reveal common customer pain points that can be addressed through additional services. Developing expertise in the combined power of top apps and HubSpot can lead to an extended scope of services and the ability to address more customer needs.

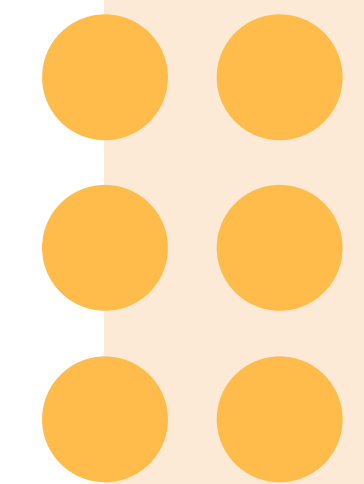
Commission Revenue

HubSpot app partners often have generous revenue share programs for their agency partners. By becoming knowledgeable about these apps, forming a partnership, and recommending the app when it meets the needs of their prospect or customer, solutions partners can add an additional revenue stream to their business.

Solutions Partner Highlight

Why Carabiner Group Built a Strong Tech Partner Program

Partner-led and community-led growth are a key component in the substantial growth of HubSpot solutions partner, Carabiner Group. A significant portion of their revenue is attributed to these partner-driven strategies. Much of their success in partnering has come from creating relationships with HubSpot app partners like [Formstack](#) and [Ebsta](#).



We interviewed Cliff Simon, CRO at Carabiner Group, to get a better understanding of why solutions partners can benefit from creating technology partnerships.

How do you determine which tech partners to partner with?

So for us it starts with value alignment. Are we looking to accomplish the same kinds of things? Do we service the same market? What existing overlap is there? Where, what's the white space? Are there any existing pipelines that we can help influence?

What value have you seen from the creation of tech partners?

Our most profitable partnerships have been the ones like Formstack where they took a lot of time in the early days of us as a company driving enablement.

Because of that, we talked about how Formstack could help a customer fix problems specifically on digital transformation. And that's how we were landing clients in the early days. And once they saw that we had capability, they started bringing us in on a couple of deals here and there.

Section 1.6

And because of that, we were able to find more and more interesting ways to use the technology outside of its stated use case. And now we generate more Formstack revenue than any other partner does and have access to additional priority resources internally.

If we need help trying to figure out something from his engineering perspective or code perspective or whatever else it might be, we can get it. So that's been a really fruitful partnership.

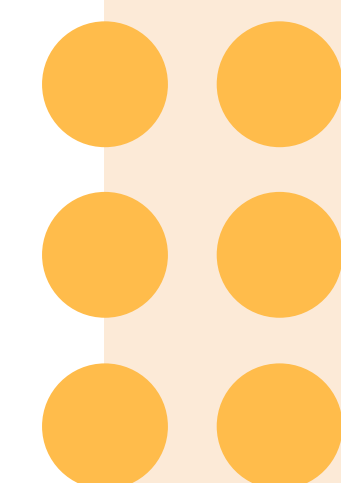
We're now cornering a very small niche market, but [this has] added up to be very serious dollars for us as a company.

Which is more compelling: The network effect of being partnered with a tech company or the services that you can craft as a result of bringing in some of these partnerships?

I think it depends on the partner. We're a bootstrapped company and there were some partnerships that we entered into for marketing purposes. They had great marketing.

We wanted to make sure that we were on people's radar. It helped raise our profile.

And other situations we've been able to have both that and a situation where it was commercially viable for both parties. We're able to refer them into our clients and they're saying, "Hey, we've got customers with these needs and we'd like you to have a conversation with them and see if you can help." That side of it's been good.



Section 1.6

How do you go about creating new services around new tech partners?

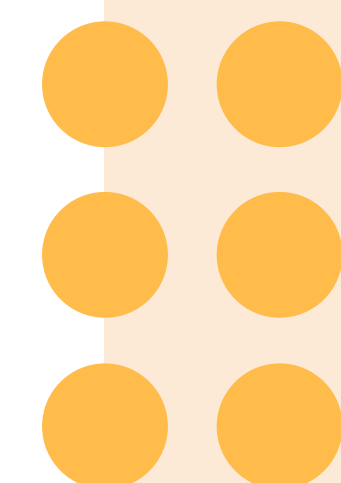
We want an idea of the category that the customer is trying to solve for. And then we're going to recommend what we think the best solution is in that category. And then figure out any gaps between the solution and what the customer wants and needs given their stated future goals.

That's part of it on the managed services side. An example where we have created services around a technology partnership, other than Formstack, is Ebsta. They have the ability to generate an insights report, which really complements our audit offering.

So in this case we're using them to ingest data to provide analytics to a company that doesn't have a lot of visibility at the moment. This helps drive some validity as far as what a baseline is when they're about to go through some very large digital transformation from a RevOps perspective internally.

And I think having a really good baseline for them as to where they are today and how they can integrate on a go-forward basis to track those KPIs.

While this is not a net new service offering for us, it's augmenting a service offering that we've had for a while. Our service offerings in the past, specifically around our audit, have been qualitative. Because of our partnership with Ebsta, we're now taking that qualitative assessment and driving some additional insights from a quantitative perspective. It became a much more valuable service through this partnership.



Section 1.6

A huge part of your go-to-market strategy is partner led growth. Why did you choose partner led growth and how do you execute on it?

People in B2B want to buy like they do in B2C. So the number one way people buy in the B2C world is word of mouth referrals from people that they know and trust.

We all do the same thing, right? You want to check something out, you recommend something, or you're excited about something. You tell your friends about it. People do the same thing about the tech they're using.

For us, it was important to continually show up in the places that our buyers go to get help and to be able to offer value there in forms of insights and good conversations and to be a sounding board. Through those efforts, we started developing relationships with technology companies that we saw were being fruitful and actually supplying impact to our customers.

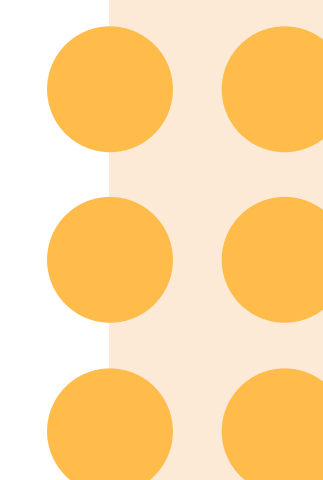
So we pursued against those. Either because it was a good tool or because we became friends and had real human relationships with folks. And that keeps driving us forward piece by piece.

And what has been the result of this go-to-market strategy for your business?

My first full year at Carabiner we did 7 figures in revenue and 53% of our revenue was driven by word of mouth, referral, or community led growth.

In 2022, we almost 4.5x our growth from my first full year and 91.5% percent of that was attributed to word of mouth referral or community led.

In 2023, we'll end up growing a bit, which is fantastic in a down year. Right now we're fluctuating somewhere around 85% from word of mouth, referral, or community led.



Section 1.6

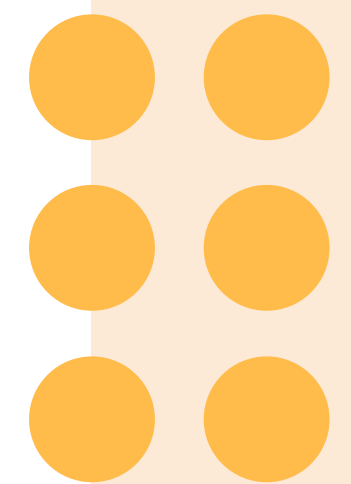
What is your advice for executing a partner led growth strategy?

To constantly give back to the community and talk with people and offer insights. Help them learn, help them do their jobs better. When we're adding value, it's so easy for them to think back on that value, remember what we had to offer, and then recommend us to others. That's been a very large driver for us as well.

This year, we've seen a larger amount of deal flow from our ISV partners as a result of the time and effort that we have put into these partnerships. My concern with most CROs is that they are either not going to have the patience or their boards will not have the patience to allow them to stand it up.

A partner motion is not a light switch that you can just turn on. We got our first community led deal within three months in one community, four months for another, and five months for a third community. And the community that's actually been the most lucrative for us from a commercial perspective took eight months for us to close a deal.

But after that, it was like two to four deals a month. It took time, but like all good things, you reap what you sow.



Section 2

How to Work with HubSpot App Partners



Building a tech partner ecosystem isn't just about finding and connecting with potential app partners. It's a strategic process that requires thoughtful planning, execution, and continuous refinement.

This checklist is a guide for each step of the process. From initial research to building a well-structured partner program, this is a roadmap to ensuring app partnerships help meet key business goals like driving new revenue and customer retention.

To better illustrate each of these sections we'll use an example of an example agency called XYZ:

XYZ Agency, a dynamic marketing firm, recognized the importance of integrating technology into their services. Their goal was clear: to forge a tech partner ecosystem that would elevate them in their industry, and provide world class solutions to their customers.

Steps to Working with App Partners

1

Research and Understanding

2

Formation and Kick Off of App Partnerships

3

Evaluation and Tracking

4

Processes, People, and Incentives

5

Create Enablement

6

App Partner Program Development

Research and Understanding

- ✓ Understand what apps prospects and customers are using today.
 - ✓ Survey existing customers about their app usage. Use a service like BuiltWith that has a great [HubSpot Integration](#) for finding the tools your customers are already using.
 - ✓ Analyze customer support tickets, call transcripts, or FAQs for mentions of third-party apps. Check out this keyword extraction resource from [MonkeyLearn](#).
 - ✓ Look into industry trends and reports for the relevant buyer personas. Websites like [Statista](#) or [IBISWorld](#) offer extensive industry reports and trends.
 - ✓ Account map with prospective app partners on a tool like Reveal or Crossbeam to understand how many prospects and customers are already using the app or part of the app's target audience. [Reveal](#) and [Crossbeam Insider](#) have resources to help leverage their account mapping tools.
 - ✓ Check which apps are specifically relevant for your ICP (Ideal Customer Profile). Look through the [HubSpot App Marketplace](#) for apps that may be relevant to different business needs of your ICP.
 - ✓ Validate the level of services you can potentially wrap around these apps.

Section 2.1

XYZ Agency began by surveying their existing customers, probing into their app usage patterns. This direct feedback provided invaluable insights into the digital tools their clients valued. They analyzed their customer support data, meticulously analyzing tickets, call transcripts, and FAQs for mentions of third-party apps, unearthing a goldmine of customer preferences.

To broaden their understanding, the agency looked at app rankings and reviews in the HubSpot App Marketplace, researched industry trends, focusing on buyer personas that aligned with their client base. This step revealed key market shifts and emerging tech opportunities. Finally, using tools like Reveal and Crossbeam, XYZ Agency mapped accounts with prospective app partners, discovering the size of the overlaps and potential use cases with their existing client base.



Determine the best-fit apps that can supercharge your current services. This doesn't always mean the biggest player in the game. Look for rising stars and hidden champions. There might be a greater initial ROI from being the #1 partner at a rising star than the 150th partner at a bigger company. Visit [Crunchbase News](#) for insights on emerging companies.



Examine all service offerings, and a maturity model of those services, to identify top HubSpot apps that are relevant to current service offerings. HubSpot's [App Marketplace](#) is a great place to start.



Gauge the product and brand of these apps through online reviews, customer feedback, digital presence, and word of mouth. [G2](#), [Capterra](#), and [TrustRadius](#) offer extensive user reviews and ratings.



Conduct competitive analysis to understand what apps competing service companies partner with. Check out partners' websites, their social accounts, and press releases to see what partners they talk about. Tools like [SEMrush](#) and [SpyFu](#) provide further insights into whether competitors are covering particular apps.

Section 2.1

The team at XYZ Agency reviewed their service offerings through a maturity model lens, pinpointing top HubSpot apps that work well with each of their current services. They evaluated the product quality and brand reputation of these apps, looking at online reviews and soliciting customer feedback. A competitive analysis was conducted, giving XYZ insight into the tech partnerships of rival service companies, which informed their strategy.

- ✓ Research the apps' agency partner program. It's ok if they don't have an official partner program. It's just good to know if they have the resources you need to be successful with them.
- ✓ Investigate the benefits and requirements of joining. Companies with established partner programs often have a Partner page. If it's not in the top navigation on their website, check in the footer.
- ✓ Reach out to the app company for further details and to understand whether their approach to customers, selling, and work aligns with your company's. Hop on LinkedIn and look up the app company. Once you're on their page open the People tab and search for Partner or Partnerships to see if they have anyone dedicated to their partnerships function. Try to connect with those folks to get further details.

XYZ Agency's team investigated the benefits and requirements of potential app partner programs, weighing the pros and cons of each. They reached out to a select group of ISVs, engaging in discussions to understand alignment in customer approach, selling strategies, and work ethics.

Section 2.1

- ✓ Understand your company's bandwidth and needs when it comes to partners.
- ✓ Ensure you have an employee who can manage any partnership and serve as the point of contact.
- ✓ Decide whether your priority is to co-market, co-sell, co-service, and/or to co-build, and ensure you have the appropriate employees to support those motions. Learn more about [Co-Marketing](#) and [Co-Selling](#).

They evaluated their core priorities, deciding whether to focus on co-marketing, co-selling, co-servicing, or co-building. This clarity guided them in aligning their team's skills and resources with the chosen partnership models. Recognizing the importance of dedicated management for these partnerships and because they wanted to focus on co-marketing and co-selling, XYZ Agency designated a sales team member as the point of contact for all partnership activities. They also ensured their head of marketing was onboard.

Formation and Kick Off of App Partnerships

- ✓ Based on your research, select the apps that are most likely to drive the most value for your business. If you're relatively new to partnering with app partners, start with three or less. Depending on the size and maturity of the app partner's program you may want to start first with Co-Servicing and work your way into Co-Marketing and Co-Selling.
- ✓ Create a shortlist of potential app partners.
- ✓ Develop a pitch tailored to each app's value proposition. Reach out to app partners via email or LinkedIn if you don't have a personal connection to the company.
- ✓ Discuss terms of a potential partnership, focusing on mutual benefits. Share account overlaps via Reveal or Crossbeam to understand the potential business impact.

The team shortlisted three apps, focusing on those with the most significant potential to enhance their business. Being relatively new to this arena, they wisely chose to start with no more than three partners. Each potential partner was approached with a bespoke pitch, tailored to highlight the unique value XYZ could bring to the table. The outreach was meticulously planned, using email and LinkedIn, especially when no direct connections existed. Discussions about partnership terms centered on mutual benefits. XYZ used tools like Reveal and Crossbeam to demonstrate the potential business impact through account overlaps.

Section 2.3

- ✓ Formalize your partnership terms and processes.
 - ✓ Draft partnership agreements with defined roles and responsibilities.
 - ✓ Ensure that your expectations for the partnership are clear and align with the app partner's goals. Here's a [partner strategy framework](#).
 - ✓ Establish communication channels and cadences with partners to ensure you meet your goals. This may include Slack channels for sales or CS reps to collaborate, project management tools to execute marketing campaigns, emails, and quarterly meetings to go over results.
 - ✓ Create a Mutual Action Plan (MAP) with your partner. This is where you define expectations, create to-do's, and build accountability as you work together toward success.

The agency drafted detailed partnership agreements, ensuring roles and responsibilities were explicitly outlined. They set clear expectations, aligning them with their partners' goals, to forge a mutually beneficial relationship. XYZ Agency established varied communication channels, including Slack for sales and customer service collaboration, project management tools for marketing campaigns, regular emails, and quarterly meetings to review outcomes.

Section 2.3

- ✓ Identify your goals for your first two quarters working together and hold a kick off meeting with any relevant parties.
- ✓ Work closely with the partner to define the joint value proposition in the market. Share this with relevant internal stakeholders.
- ✓ Consider doing a co-marketing campaign in the first two quarters to test the value proposition and get feedback from your audience.
- ✓ Identify a person on your services team to foster a deeper understanding of the app and bring it into a relevant customer account. Listen to customer feedback.
- ✓ Ask the app partner to bring you in to a few deals or customer accounts where your services are needed.

Initial goals for the first two quarters were identified, focusing on joint value propositions and market impact. A kickoff meeting brought together all relevant parties, ensuring alignment and shared understanding.

XYZ Agency and their partners crafted a co-marketing campaign for the first quarters, aiming to test and refine their joint value proposition based on audience feedback. They set a goal of having higher conversion rates than normal with a lower CAC.

A dedicated member from the services team was appointed to deepen the understanding of the app and integrate it into customer accounts, with a keen ear for customer feedback. The sales team sought opportunities from their app partners to be included in deals or customer accounts where their services would add value.

Evaluation and Tracking



Implement co-marketing tracking



Give partners UTM codes to identify any traffic or leads that come from partner campaigns or showcases. Capture the conversion rate and MRR.



Evaluate the CAC of co-marketing campaigns with partners.



For in person partner events, make sure to log the partner as the source when the lead is entered in your CRM.

XYZ Agency diligently focused on tracking and evaluating the effectiveness of their co-marketing efforts with their app partners. They implemented the use of UTM codes for partners to track traffic and leads from joint campaigns. This allowed them to capture key metrics like conversion rate and MRR.

Evaluating the Customer Acquisition Cost (CAC) became a regular practice, particularly for campaigns conducted with partners. For in-person events, XYZ ensured that partner contributions were accurately recorded in their CRM as the source of new leads.

As their co-marketing and co-selling matured, they added a Partner object in their CRM so they could more easily track partner sourced and influenced deals.

Section 2.4

✓ Implement co-selling tracking

- ✓ Use a tool like Reveal or Crossbeam to share prospect and customer accounts with app partners. Or if you're just starting, you can share accounts via a spreadsheet. Make sure your legal agreements allow you to share customer account names with partners.
- ✓ Consider setting up your CRM to either add partners as a custom property or custom object. This can enable you to track referrals sent and note when partners helped to close a deal.
- ✓ App partners can send referrals but they can also help close open deals by showcasing their product, providing intel or intros on the account or answering technical questions.

They utilized tools like Reveal or Crossbeam for sharing prospect and customer accounts with app partners. For smaller operations, spreadsheets were used initially, ensuring compliance with legal agreements. In their CRM system, XYZ Agency used their custom Partner object to track referrals and partner contributions to deal closures. Partners not only sent referrals but also actively assisted in closing deals by providing product showcases, account intelligence, and technical support.

Section 2.4

- ✓ Track app partnerships' impact on customer satisfaction, retention, revenue, and CSAT.
- ✓ You can add a custom object or property to your CRM to enter partner names when they source a deal, influence an account, or when the account is using their software.
- ✓ Pull reports to discover whether a partner sourcing or influencing a deal or an account using their software impacts customer satisfaction, retention, revenue, or CSAT.
- ✓ If you have customers using the software but not integrated with HubSpot, analyze whether integrated software adds a bigger boost to customer satisfaction, retention, revenue, or CSAT.

XYZ Agency pulled regular reports to analyze the impact of partner involvement on customer metrics. The agency also evaluated the additional benefits of integrating partner software with HubSpot, comparing it against non-integrated usage.

Section 2.4

- ✓ Track app partnerships' impact on metrics.
- ✓ Set up a dashboard to monitor key metrics regularly.
- ✓ Review and analyze data monthly or quarterly.
- ✓ Consider meeting with partners quarterly to discuss business impact on both sides, and align on next quarter goals.

A dashboard was set up to track key metrics, with data reviewed and analyzed monthly or quarterly. Quarterly meetings with partners were scheduled to discuss the business impact, align on goals for the next quarter, and share insights for mutual growth.

Processes, People, and Incentives

- ✓ Invest in proper processes, systems, and resourcing to support app partnerships.
- ✓ Dedicate personnel for managing and nurturing partnerships.
- ✓ Implement software to manage and track and scale partnerships. Consider a PRM like PartnerStack, Allbound, or Impartner if using a CRM is becoming unwieldy. Canalys recently analyzed the entire PRM market [here](#).
- ✓ Ensure processes and communication works well across any relevant internal departments, like marketing, sales, and product development, and with partners. Check out the [State of Partner Ops and Programs Report](#) to learn more about the importance of the right processes for partnerships.

XYZ Agency, having tracked the benefits of app partnerships, decided to further invest in the infrastructure supporting these collaborations. They committed resources to refine their processes and systems, ensuring robust support for their growing portfolio of app partnerships.

The agency hired a partner leader to manage and nurture these relationships, recognizing the importance of focused attention and expertise in partnership success. To streamline management and tracking, XYZ implemented specialized software.

They explored PRM solutions like PartnerStack, Allbound, or Impartner, especially as their CRM started to become overwhelmed with partnership data. XYZ ensured that their processes and communication channels were effective across all relevant internal departments, including marketing, sales, and product development, and extended this more streamlined efficiency to their partner communications.

Section 2.5

- ✓ If the data shows a business impact from involving app partners in deals or customer accounts, establish KPIs or incentives for your teams.
- ✓ Incentivize sales or account managers to bring partners into accounts by setting a KPI, or offering a SPIFF or commission.
- ✓ Calibrate the incentive to the observed business impact.

With clear evidence of the positive business impact from app partnerships, XYZ Agency looked to incentivize their teams to maximize these opportunities. They established KPIs that specifically encouraged sales and account managers to actively involve partners in accounts.

XYZ Agency introduced incentives like SPIFFs or commission structures to motivate their team members. These were calibrated according to the business impact observed from the partnerships. By aligning incentives with partnership success, the agency fostered a culture where team members saw tangible benefits in integrating app partners into their workflows and client interactions.

Create Enablement

- ✓ Create training materials and documentation for internal teams about the app partnerships.
- ✓ Schedule live trainings at regular intervals and invite partners to present to the team and answer questions.

As XYZ Agency continued to deepen their app partnerships, they recognized the need for comprehensive internal training to maximize these relationships. The agency developed a suite of training materials and documentation, detailing the nuances of each app partnership and how these could be leveraged in various client scenarios.

Regular training sessions were scheduled, not only led by XYZ's own experts but also featuring presentations from their app partners. These sessions provided a platform for partners to directly address questions and share insights, fostering deeper understanding and engagement among XYZ's team. Partners could also access the enablement in their PRM.

Section 2.6

- ✓ Create enablement for your partners on your services. Showcase how your services help them to close more deals or better retain customers.
- ✓ Request to present live to partner sales and customer success teams to ensure they understand the offerings and build trust with your team.

XYZ Agency went a step further, creating enablement resources specifically for each of their top app partners, showcasing how their services could amplify the partner's offerings. They crafted detailed materials that outlined how XYZ's services complemented their partners' solutions, demonstrating the added value they could bring to joint customer engagements.

XYZ requested opportunities to present these insights directly to their partners' sales and customer success teams. These live sessions were instrumental in building trust and understanding between XYZ and their partners, ensuring that both sides were well-versed in the synergies of their collaboration.

App Partner Program Development

- ✓ Launch a more formal app partner program.
- ✓ Design a program structure, including tiers and benefits and any standard commissions.
- ✓ Develop promotional materials and resources for partners who can share they are part of the program.
- ✓ Host a launch event or webinar to introduce the program as well as clear materials to share with partners on how the program may change expectations or resourcing. [Partner Playbooks](#) has fantastic resources on how to build and run these partner webinars.
- ✓ Create a partner marketplace where customers can see which partners you support and which of your services support them. [Partner Fleet](#) has a great marketplace solution that highlights your better together stories

Section 2.7

With a solid foundation in app partnerships, XYZ Agency embarked on launching a formal partner program, aiming to structure and scale their collaborative efforts. The agency designed a comprehensive app partner program, complete with tiers, benefits, and standard commission structures.

This approach aimed to cater to various levels of partnership engagement, recognizing the diverse needs and contributions of different partners. Promotional materials and resources were developed, allowing partners to proudly announce their involvement in the program. These materials were designed to showcase the mutual benefits of the partnership to potential clients.

A launch event was planned, encompassing both a webinar and other interactive sessions. This event served not only to introduce the program but also to clarify any changes in expectations or resources required from the partners.



Refine partner program to optimize impact.



Gather feedback from initial partners on program effectiveness.



Make adjustments based on feedback and performance metrics.



Continuously iterate on the program based on industry changes and new insights.



Conduct an annual survey of partners to understand their satisfaction and goals.

Section 2.7

XYZ Agency understood that the success of their partner program depended on its ability to evolve and adapt continually. After the launch, XYZ actively solicited feedback from their initial partners, seeking insights into the program's effectiveness and areas for improvement.

Adjustments to the program were made based on this feedback, as well as data-driven performance metrics, ensuring the program remained aligned with the goals and needs of both XYZ and its partners.

Recognizing the dynamic nature of the industry, XYZ committed to continuous iteration of the program, incorporating industry changes and fresh insights to stay relevant and effective. An annual partner survey was introduced, aimed at gauging partner satisfaction and understanding their evolving goals and expectations.

As XYZ Agency's journey of developing and refining a robust app partner program comes to a close, it's clear that this strategic initiative has yielded significant and multifaceted business outcomes. The decision to formalize their app partner relationships into an official program has not only elevated their operational capabilities but also profoundly impacted their market position, customer satisfaction, service offerings, and financial success.

While XYZ is a fictional agency, it's modeled after top agencies that are embracing the app ecosystem as a way to expand and validate their business. The resources in this playbook are designed to help agencies explore this channel as a growth lever for their own business.

Solutions Partner Highlight

How SmartBug Media Thinks About Tech Partner Engagement

Although many agencies impulsively adopt new technologies without a clear strategy, often taking months to figure out its utility, Smartbug Media emphasizes the importance of identifying specific tech needs, followed by scouting for appropriate vendors.

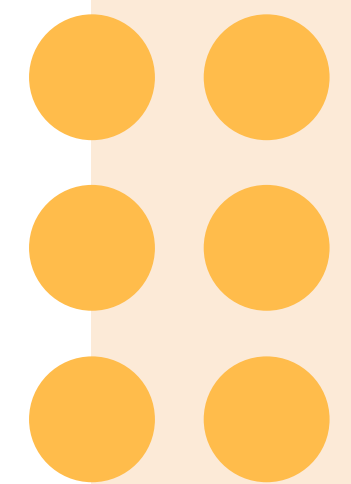
We chatted with Paul Schmidt, Director of Services Strategy at Smartbug Media, for a tactical look at how they develop services around new tech partnerships.

How do you think about the creation of services when you engage with a new tech partner?

How I've seen it work inside a lot of agencies is they see a shiny new technology and then they sign a contract and they're like, "Great! Now let's figure out how we're going to build a service for this."

But then they really aren't able to utilize it for some period of months until they figure it out. They're unsure of what they're going to do with it and which customers of theirs want to sign up for it.

At SmartBug, we identify that there's a specific need, then we start looking at different vendors in the market that could provide a that type of solution based on [a number of factors] such as the tech and integration ability, the cost, what's going to be the best fit for us and for our clients.



Section 2.8

And then in terms of building services on top of that I work really closely with our client services team. These are our strategists who are the account owners. They understand their client's pain points and understand how this tech could fit within their tech stack, and how our services can help them with the implementation or ongoing support of that solution.

From there, we do a lot of discovery interviews internally. We survey our team to get one on one conversations with account owners. We build out a product brief or project brief that talks about the individual implementation service that will implement the new tech partner's solution for the client.

This brief will contain a lot of information that is useful from a process perspective. It shows the account owner how to actually do the implementation and how to go through the discovery process with the customer.

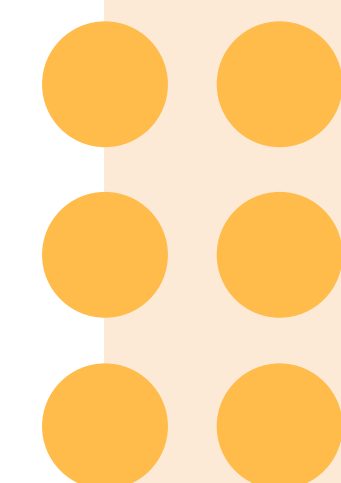
Having this kind of product brief is also important for our sales team because our sales team needs to know what questions to ask as well.

They need to be able to ask the questions of the prospects like, "how do you get your data today?" And "what systems do you use to integrate your data?" And "who on your team is responsible for this?"

Building out a thorough brief is useful for sales and marketing, and for the client services and delivery teams.

And then from there, as we get closer to bringing the service online, we build out the enablement materials for our client services team so they can pitch to their clients on their meetings and their QBRs.

And then we have a solution for the tech partner and we take that and then put that in our services catalog with link it to the product brief and the rest of the created materials.

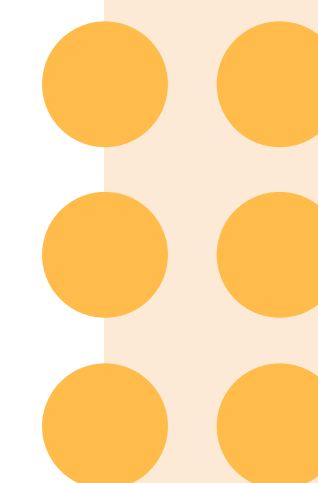


Section 2.8

When you're looking for new tech partners do you find that Hubspot App Partners are often a better fit?

Yeah, definitely. Especially when I am looking at apps that I am not already familiar with or don't have a huge presence in the market. Let's say an app I have not heard of already has 20 or more customers using their app - that means they've already got some validation. In addition, becoming an app partner typically means they underwent technical validation so we don't have to worry about whether something new has to be built before we can suggest it to our customers and wrap a service around it.

These are social proof signals. There's trust that's built into it when you're already a HubSpot partner. They had to go through vetting and a process to become an app partner. That provides credibility.



Conclusion

Conclusion

HubSpot solutions partners are uniquely positioned to leverage the HubSpot app partner ecosystem to deliver more value to customers. For Emerging Connectors, Selective Collaborators, and Ecosystem Pioneers alike, there's immense potential to grow by forging meaningful partnerships with app partners.