

# Crossbeam for Sales

Crossbeam for Sales: Empowering sales leaders, managers, and reps to leverage their partner ecosystem for faster pipeline growth.

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## What is Crossbeam for Sales?

Crossbeam for Sales is the ultimate ally for GTM teams. With a powerful platform that leverages the collective strength of your partner ecosystem, you gain unparalleled access to shared data and insights, providing sellers with a goldmine of new opportunities that are 53% more likely to close. Give your sales team the tools they need to uncover new leads, accelerate deal cycles, and expand accounts with ease. Crossbeam for Sales is for:

- Account Owners (AOs)
  - Sales Development Reps (SDRs)
  - Customer Success Managers (CSMs)
  - Sales Directors (CROs / VPs)
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## Crossbeam for Sales Pricing

Crossbeam for Sales is available on Connector Plan and Supernode plan. [Check out our pricing page](#) to see the cost and offering of Sales seats for each.

To add more User seats in Crossbeam for Sales, visit the [Plan & Billing page](#).

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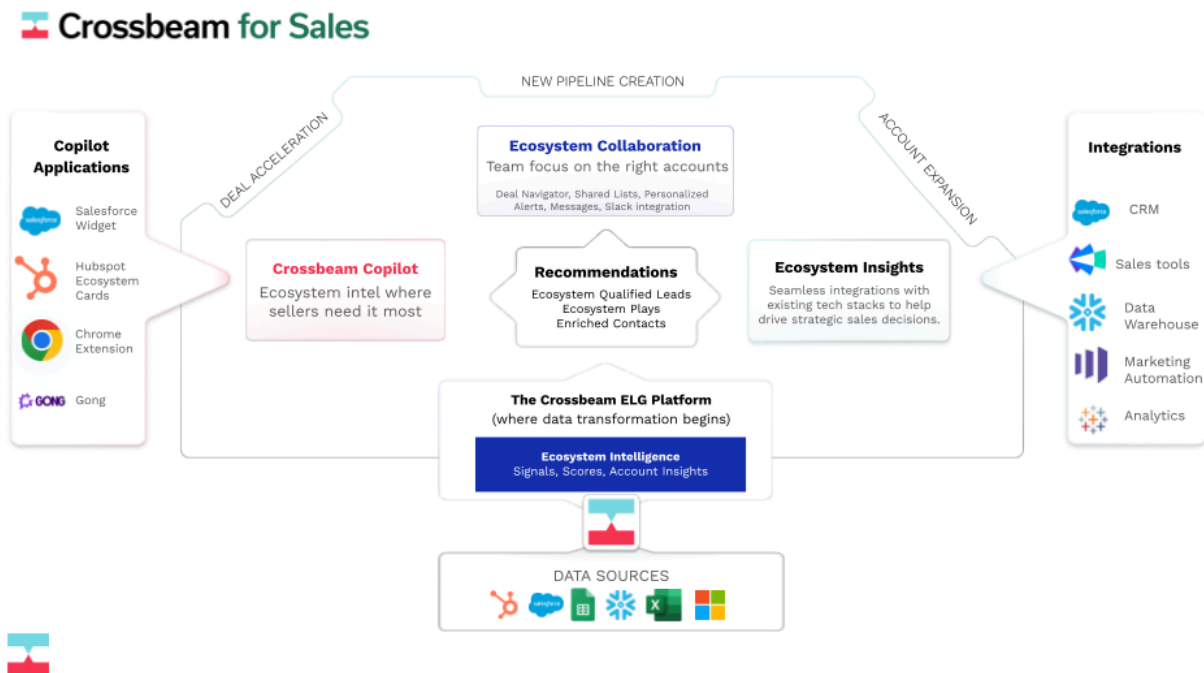
## Understanding Crossbeam Core and Crossbeam for Sales

Crossbeam Core is purpose-built for your partnerships team. It includes the functionality you know and love, including The Crossbeam Network, Automating Account Mapping, & more.

Crossbeam for Sales is purpose-built for your sales team. It includes functionality that allows your sales team (AEs, SDRs, CSMs) to maximize your partner ecosystem and

co-selling opportunities — including Crossbeam Copilot, Deal Navigator, Co-Selling Workflows, & more.

## How Crossbeam for Sales Works



Crossbeam for Sales leverages the collective strength of your partner ecosystem to give your sales team the insights they need to uncover new leads, accelerate deal cycles, and expand accounts with ease.

### Here's how it works:

1. Crossbeam ingests ecosystem data from multiple sources like CRM platforms, data warehouses, and spreadsheets and pushes it into the Crossbeam platform where the ecosystem magic (mapping) happens.
2. This is what powers our Ecosystem Intelligence—the layer providing the core elements (Ecosystem Qualified Leads, Plays, and Enriched Contacts) that make Crossbeam for Sales a powerful solution in the sales tech stack.
3. Leveraging Crossbeam Copilot, ecosystem insights are pushed into the platforms your sellers work in every day (Salesforce, HubSpot, Chrome, Gong etc.), allowing them to make more informed decisions about how/when they go after accounts to close

bigger deals, and close them faster. Reps can then take action and get connected with your partner's straight from there.

4. Our data integrations into platforms like Clari, Snowflake, and Salesforce, help sales leaders make more informed decisions when it comes time for planning and forecasting, factoring in deals you know will close faster and at a higher ACV.

5. And with seamless collaboration in-app and within platforms like Slack, your partnership and sales teams can partner together to focus on going after the right accounts.

All of this comes together in our Crossbeam for Sales solution to help your teams accelerate deals, generate new pipeline, and expand accounts and drive higher ACV.

Note: Partnership Managers have full control over who can message select partners and will have full visibility into each interaction to avoid any potential conflicts.

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## Setting Up Crossbeam for Sales

To use Crossbeam for Sales, you must have:

- Seats: Full Access Seats and/or Sales Seats
- Roles
  - Manager: configures Crossbeam for Sales, manages other user's access to Crossbeam for Sales
  - Standard: full access to Crossbeam for Sales features, can make partner requests, can use Chrome extension, full access to Salesforce Widget, gets alerts, access to lists, access to Deal Navigator, reply to conversations, complete conversations and mark Attribution, does not have Crossbeam Core Access
  - Limited: full access to Crossbeam for Sales features listed for the Standard role, but can not make partner requests or access list, does not have Crossbeam Core Access
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For more detailed information on User Seats and Roles, view this article [here](#).

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From the left-side Navigation Menu, click on the [Co-Sell](#) icon. Select Crossbeam for Sales from the panel options, and a new external window will open displaying Crossbeam for Sales. Locate the Finish Setup button near the top of the page and click on it to open the authentication page.

- Add a description to your company

- Click Enable Crossbeam for Sales button and complete any additional sign in AuthO settings
- In the next screen, select partners to work with and click Continue
  - the next pages will confirm populations and what data is being configured
- Next, click the [Add to Slack](#) or Skip
- Continue to configuring [Co-Selling Templates](#) and click Continue when done

You will return to the homepage in Crossbeam for Sales when the set-up is complete. Click [here](#) to see a video of the steps in action.

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## Lists in Crossbeam for Sales

Lists are a collaborative way to interact with account mapping data. You can quickly create custom lists of accounts/overlaps and share with teammates.

- Partner Manager → Salesperson: Partner Managers can create focus lists for salespeople.
- Salesperson → Partner Manager: Salespeople can create lists for Partner Managers to help them on.
- Salesperson → SDR: Salespeople can create lists for Sales Development Representatives (SDRs) to help them on.

Crossbeam for Sales makes it easy to take account mapping data and collaborate with colleagues.

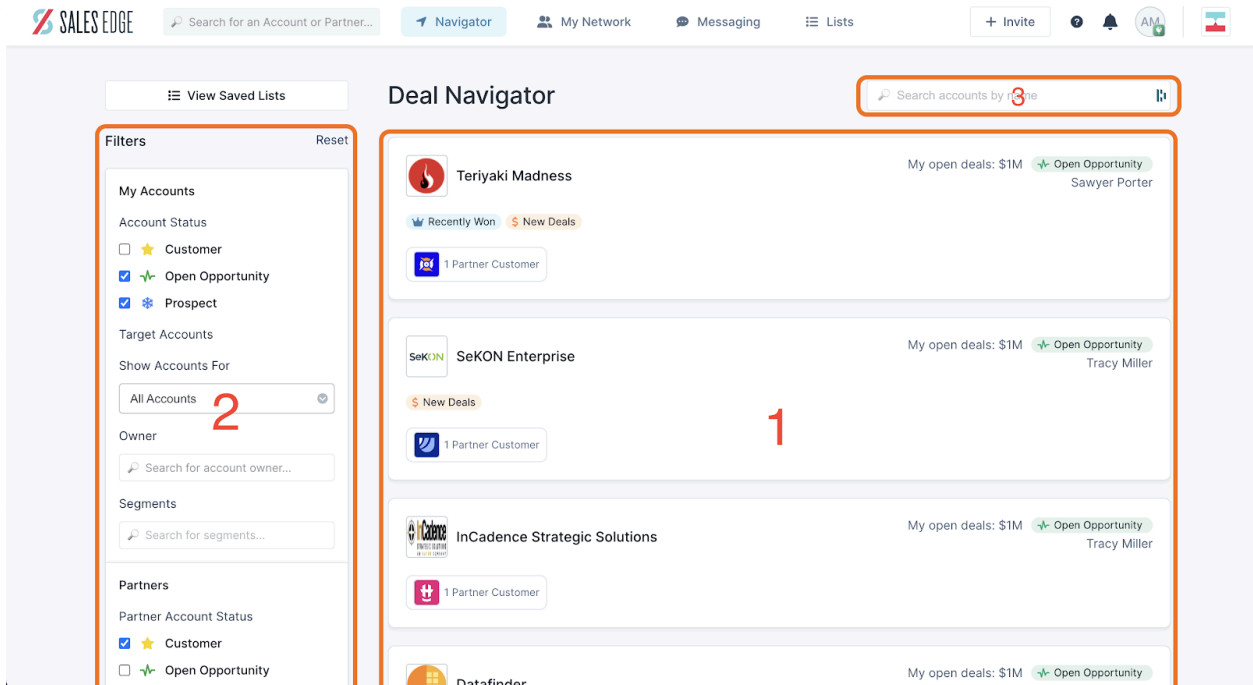
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## Deal Navigator in Crossbeam for Sales

The Deal Navigator is the best single view of your sales pipeline, designed so you can move each deal forward. This is the default page in-app for all Salespeople.

Certain filters are applied by default, and the resulting deals are sorted based on open deal status and the size of the deal.

Deals are listed in a sorted order on the right side of the navigator [1]. Your filter controls are on the left [2]. You can search in real-time using any custom string at the top [3].



### Default Filters

By default, Deal Navigator only shows the most promising deals which deserve attention. This means the deals in the default view include your prospect accounts that both:

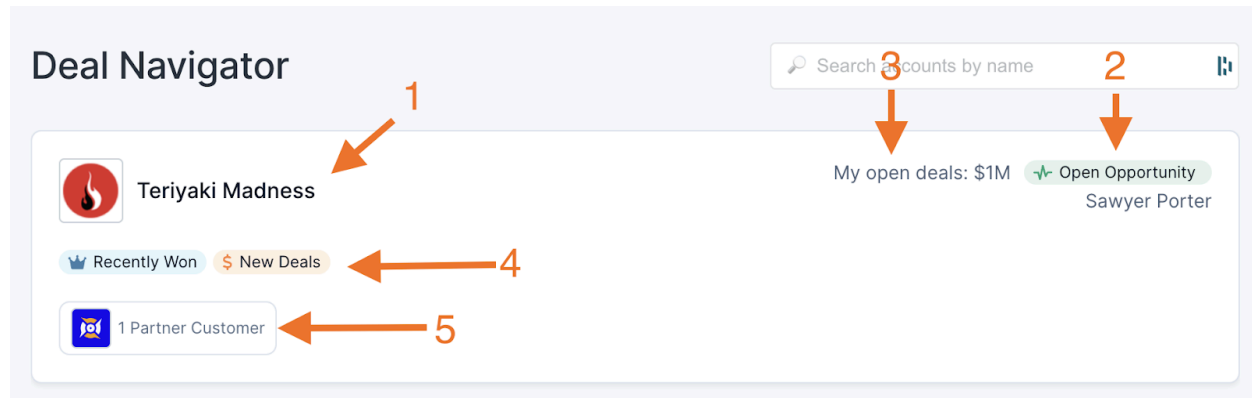
1. Have a status of "Cold" or "Has Opportunity" and
2. Are your partners' customers

<p><b>My Accounts</b></p> <p>Account Status</p> <p><input type="checkbox"/> ★ Customer</p> <p><input checked="" type="checkbox"/> 📈 Prospect (Has Opp)</p> <p><input checked="" type="checkbox"/> ❄️ Prospect (Cold)</p>	<p><b>Partners</b></p> <p>Partner Account Status</p> <p><input checked="" type="checkbox"/> ★ Customer</p> <p><input type="checkbox"/> 📈 Prospect (Has Opp)</p> <p><input type="checkbox"/> ❄️ Prospect (Cold)</p>
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It may feel a bit like magic, but the way we order deals in the Navigator is straightforward: We show you active deals first, sorted by the value size.

### Deal Details

Each deal card in the Navigator shows you important account details, including the Account Name [1], your deal status [2], and your deal size [3]. Clicking on the Account Name will take you to that Account details page.



You can also see all the signals [4] that apply to each account, and each partner that has account overlap [5].

### Partner Deal Signals

Partner Deal Signals help you cut through the noise and gain important timing insights. Use them to determine which partners can be most helpful today and understand where your prospects are in deal cycles.

With the exception of the Recently Won signal (any deal that was won within the last 90 days), all of the signals are self-explanatory, and within the last 30 days:

- Deal Movement
- New Deals
- Recent Activity
- New Contacts

### My Accounts

My Accounts gives you control over filtering based on your account status:

- Customer
- Has Opportunity
- Cold

You'll also see a link that takes you over to Configure Target Accounts.

Show Accounts For has three selections:

- My Partners (Default for Partner Managers)
- My Accounts (Default for Sales Users)
- All Accounts

### Owner

The Owner field takes an account owner name, and will only show deals that are owned by that individual.

### **Partners**

The Partners filter lets you control the deals shown based on partner account status. Often, you'll be interested in accounts that are already Customers of your partners for the best connections.

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### **Pro Tip**

Looking to send accounts from a Shared List in Crossbeam to an account owner in Crossbeam for Sales? There's an article for that, click [here](#).

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## **Crossbeam Copilot Overview**

Crossbeam Copilot puts Ecosystem Intelligence in the hands of sellers where they work every day. Our current Copilot Apps include: Salesforce, HubSpot, Chrome, and Gong. With access to Copilot, sellers can:

### **Prospect Smarter**

- Identify which partners are the best to help provide insights, introductions, or assistance with target accounts. And then reach out to them directly from within the app.
- Access enriched contacts with signals like “Decision-maker” and “Economic Buyer” to help identify the best contacts to reach out to. And add them to your CRM if they’re missing!

### **Close Deals Faster**

- Leverage Ecosystem-Led Growth plays packed with relevant actions sellers can take based on partner status and contextual insight for every deal.

The screenshot displays the Crossbeam Copilot interface for the account 'SkuVault'. The interface is divided into several sections:

- Details / Related:** Shows 'Crossbeam Attributions (1)' with a table:
 

Crossbeam Attribution Name	Partner	Attribution Type	Attribution Recorded At
a048a0000QgDsXz	Holver*	Influenced	9/14/2023, 12:30 PM
- Crossbeam Overlaps (6+):** Shows a table of overlaps:
 

Crossbeam Overlap Name	Partner Name	Partner Population	Partner AE Name
a008a00001AsotZ	Bozala	Open Opportunities	Sara Daniels
a008a00001AsotG	Holver	Customers	Laura Keene
a008a00001AsotP	Holver	Expansion Opportunities	Laura Keene
a008a00001AIKSV	Holver	Global Named Accounts Q2 '24	
a008a00001AsosS	Surfzer	Prospects	Lisa Thomas
a008a00001Asosn	Yaarde	Prospects	Jim Wilson
- Contacts (5):** Lists five contacts with their titles and contact information:
  - Gianni Benitez (CRO)
  - Kevin Boyer (CEO)
  - Kelvin Cannon (VP of Sales)
  - Doug Kerry
  - Darbie Margaritelli
- Crossbeam Copilot Dashboard:**
  - Account Highlights:** Lists insights such as 'Holver is the best partner to work with on this account because they can help you pitch the stack'.
  - Run a Recommended Play:** Features a 'Pitch the Stack' play with a description: 'The Play: Show your contact how your product combines with partners to create a more powerful solution.' and an outcome: 'Increase win rate with a stronger value story'.
  - Co-Sell to Success:** A section for leveraging partners.
  - Related Slack Messages:** A section for viewing relevant Slack messages.

## What's included within Copilot?

### Account Tab

The Account tab is the default landing page for Crossbeam Copilot. It provides key partner insights for the account you're looking at and will even surface a recommended Play for you to leverage based on contextual insight for your deal.

### Partners Tab

The Partners tab provides a high-level overview of the associated partners for the account you're digging into. Ecosystem Intelligence signals are piped in to help sellers know which partners are the best ones to reach out to or prioritize for their deals.

### Contacts Tab

The contact tab surfaces contacts partners are sharing that you might not have on your end. This list of contacts provides additional context based on the shared number of partners and partner activity to make them more appealing for you to reach out to. Ecosystem Intelligence signals are also piped into these contacts to help you know who the decision-maker might be, or who just recently had activity with your key partner.

### Plays Tab

This tab provides relevant actions you can take depending on the partner status with the account and the additional data available.