

From 1,000 Overlaps to 100 Deals & President's Club

The Co-Sell Playbook for Partner Leaders

Russell Bradley-Cook

www.linkedin.com/in/russellbradleycook



Using AI (and Data) to Distill Signal from Noise

1,000
overlaps



100
deals that matter

- Crossbeam is a unique data set that is essential for efficient GTM. It is most valuable alongside other data
- Many companies are lost with their Crossbeam data, AI can help identify deals that matter, but...
- It's not an AI problem, it's a data problem



CROSSBEAM

Start With Your CRM Data

- Garbage in, garbage out
- Work with Rev Ops and Sales on data quality
- Use Partner budget to enrich records



1 Deal Stage

Late-stage deals have had more eyeballs on them more likely to be accurate

2 Last Touched < 30 Days

Screens out deals that are functionally dead, even if sales won't admit it yet

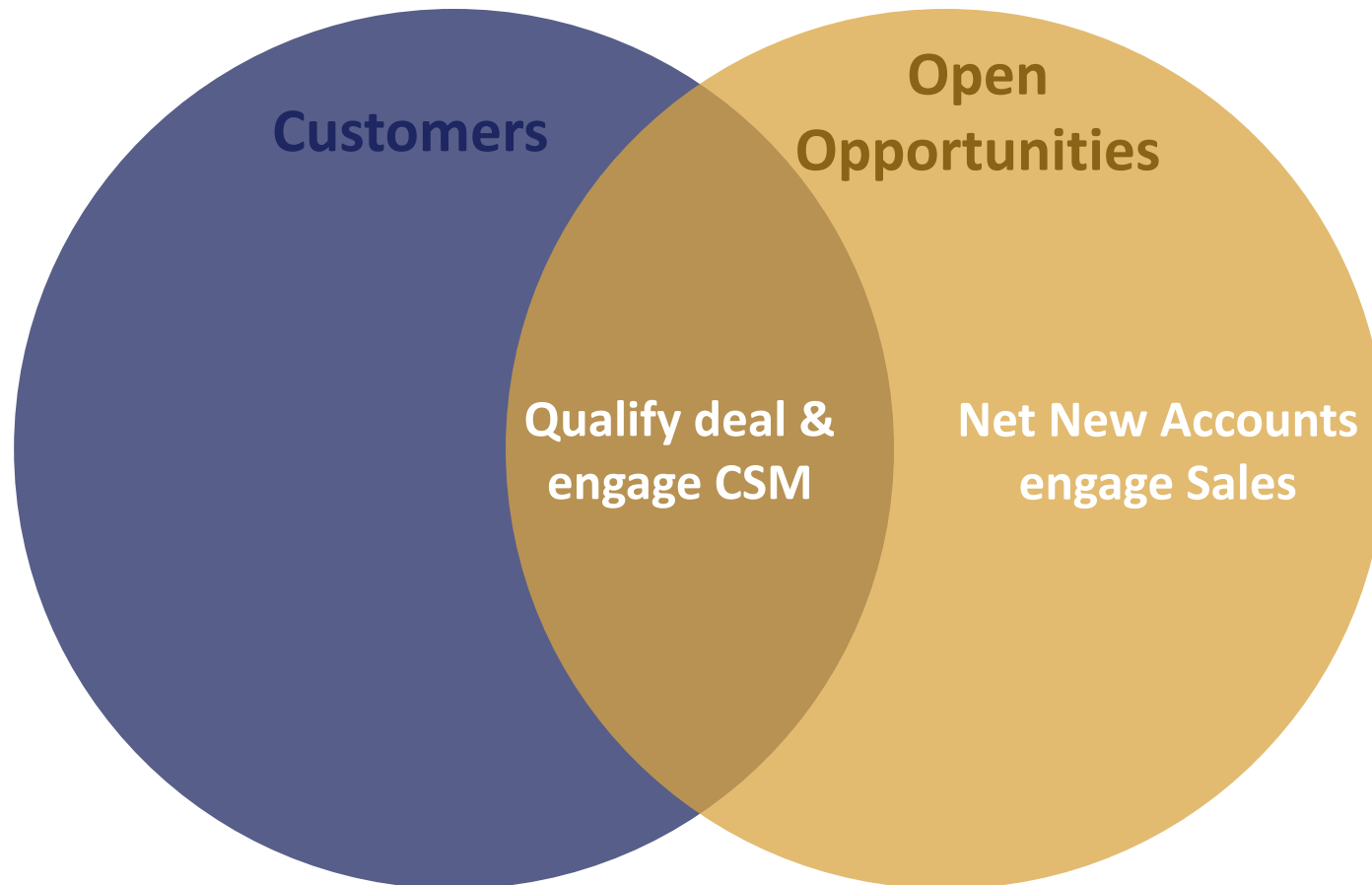
The Overlap Grid vs. the Venn Diagram

Existing Customers with Open Opportunities are on BOTH lists

Audiowolf				
		Customers	Open Opportunities	Prospects
Chatterbox (You)	Customers	4870 Overlaps	2399 Overlaps	980 Overlaps
	Open Opportunities	6500 Overlaps	6520 Overlaps	5907 Overlaps
	Prospects	1870 Overlaps	7855 Overlaps	2890 Overlaps

The Overlap Grid vs. the Venn Diagram

Net New Accounts with Open Opportunities are the BIG win
Existing Customers for cross-sell opportunities



Claude Context to Identify High Value Accounts

Customers

Current revenue =
likelihood to invest

Current products =
fit for co-sell or
nuture

Account fit

ICP fit = GEO, Vertical &
Segment

Crossbeam fields (Is a
Customer of & Is a
Opportunity of) =
Unpick the grid and run
dedicated plays for net
new Opportunities

Deals

Deal Name = valuable
free-text data

Deal Size = aim for
large deals, but don't
exclude small deals
with high Customer
MRR

Agents

Deal Validator = Analyze
all open deals

Collab Request =
Analyze partner co-sell
collaboration requests
for data & POCs

GTM Orchestration and Enrichment

- Clay as your GTM orchestrator — Crossbeam feeds in as one data point in lead scoring
- Clay, Surfe, or Apollo to add new personas on target accounts and enrich contact location for field events



1 Orchestration

Crossbeam data as a data point into lead scoring. eg strong fit CRM integration

2 Enrichment

Company size, Job titles, Contact location

3 Net New ICP Contracts

Contact names, job titles, emails, phone #

Layering in Intent Data

- Bring in G2, 6sense, or Demandbase and unify with your overlap accounts
- Analyze your overlaps based on who's already showing intent
- Partner-sourced leads that are in-market accounts



DEMANDBASE



GTM via Solution Partners

- Sourcing: 5-10 accounts from Solution Partner's client list. 10% commission for partner attach on existing deals and 25% for net new opportunities
- Expansion: Geo and Vertical. Solution Partner client list signals whether the partnership supports a move into new regions or industries
- Overlapping Solution Partner Programs: enable Solution partners to offer a joint tech stack and additional services revenue eg HubSpot, Snowflake, Segment, Aircall

Crossbeam Custom Population tip: Active Solution Partners

Maintain a list of your Solution Partners in your CRM to feed Crossbeam. Enables targeted partner acquisition and enablement.

Connect on LinkedIn to Build Your Ecosystem

Watch my [3 min video](#) on how
HubSpot & Aircall grew
100% to hit 14k installs

Russell Bradley-Cook



12k+ LinkedIn followers



HubSpot President's Club &
Top Global Co-Sell Performer
2025, 2024, 2023

[in/russellbradleycook](https://www.linkedin.com/in/russellbradleycook)

