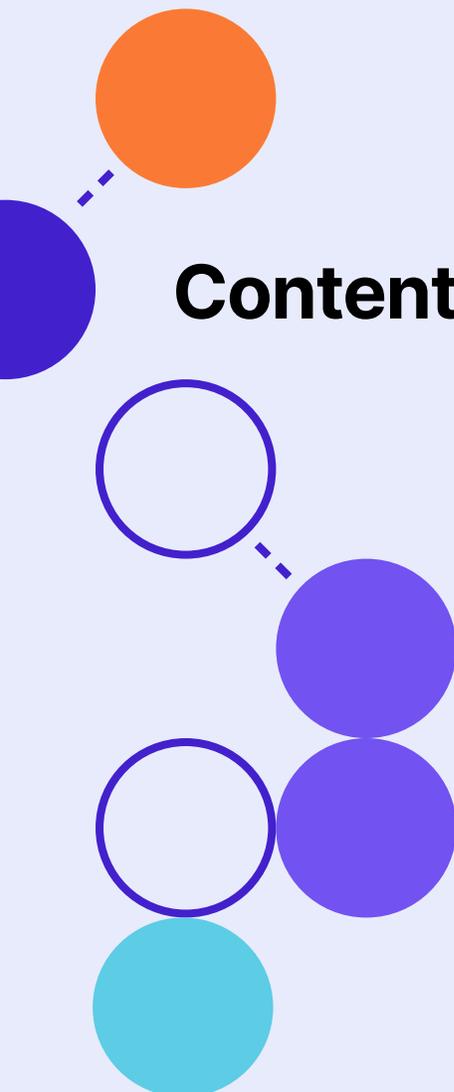


GUIDE

The B2B buyer's guide to partnerships software



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INTRODUCTION

How people buy software

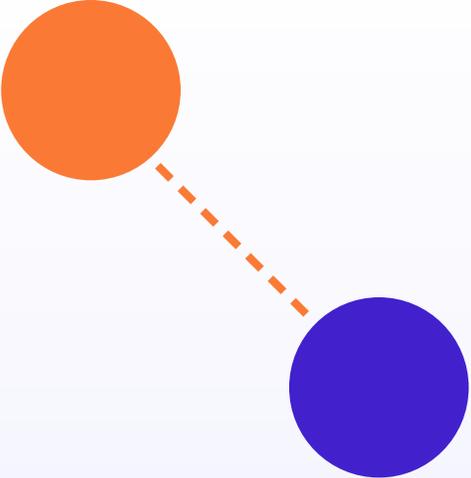
When looking to drive customer acquisition and revenue, software companies typically focus on two questions:

- How can we use marketing to generate more leads for our sales team?
- How can we get our sales team to close more of those deals?

Here's the problem with this approach: **most of your potential customers will decide what to buy before they ever talk to you.**



This isn't something you can solve just by creating your own content, no matter how good it is. When asked what matters most to them when researching potential solutions, **50% of buyers say peer experiences; 49% say product reviews; and 45% say expert opinions and reports.**



INTRODUCTION

Buyers are looking for trusted expertise, and they don't trust marketing and sales teams to give it to them. Instead, they look to peers and industry experts to identify the companies actually worth talking to. If your company doesn't come up, you're unlikely to even have a chance at making the sale.

Thankfully, this isn't out of your control. **With a partner program, you can work directly with those trusted third-party sources to market and sell your product**, reach customers during the critical research phase, and build major new revenue channels for your company.

But to build a SaaS partner program that scales, you need the right strategy and the right tools. This guide covers both.

About this buyer's guide

In this guide, we've gathered the decision-making criteria that have helped many of your peers in the business-to-business (B2B) software space choose the right platform to manage their partner programs.

This research is based on data from G2's Spring 2021 report, case studies of successful partnership programs, and insights from other thought leaders in the partnerships space. (You can learn more in the [About the data](#) section at the end of this guide.)

This guide will walk you through each factor to consider when researching potential partnership platforms, helping you select a solution that:

- ✓ gets your program launched faster
- ✓ help you acquire and retain more partners
- ✓ saves time and money with automation
- ✓ scales your program to multiple channels for more revenue

All while covering some of the commonly overlooked factors in building a successful SaaS partner program.

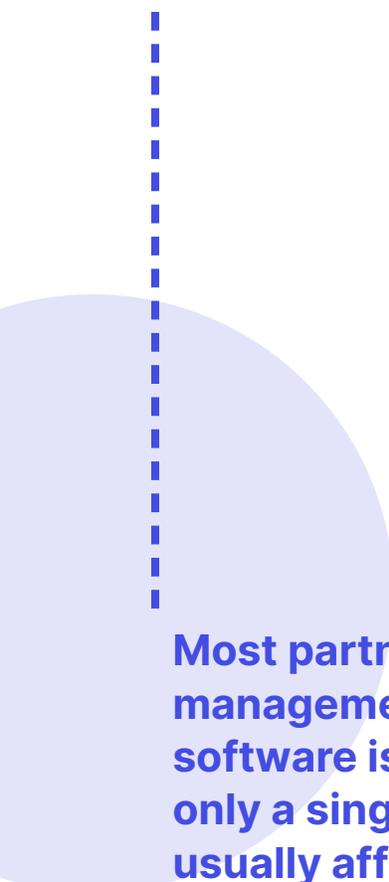
Before we can do that, we need to understand what makes B2B partner programs in SaaS different from typical ecommerce affiliate programs — and why not all partnerships software is built to handle B2B.

The unique needs of B2B partnerships

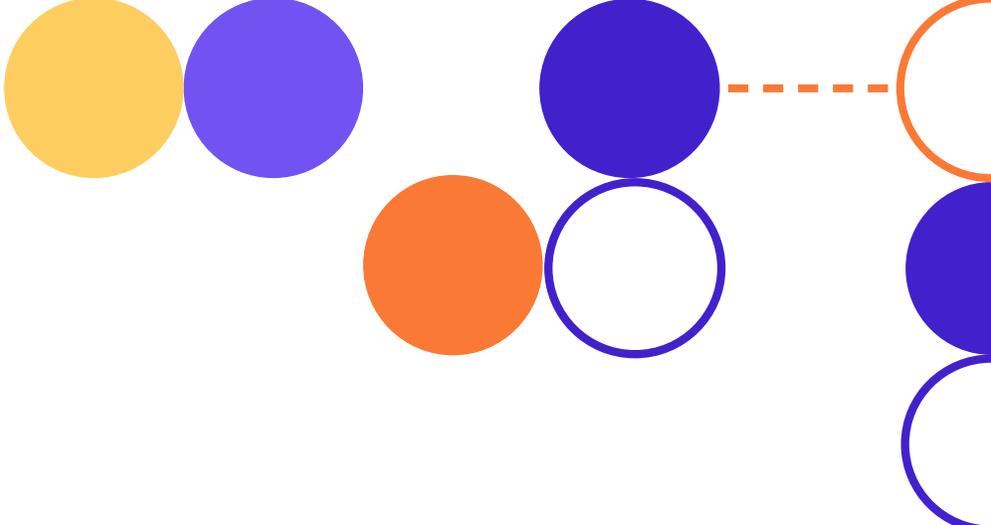
Partner programs can drive customer acquisition and revenue through many types of partners, including:

- Affiliate marketers and content creators that drive traffic and awareness
- Customer ambassadors that refer other users to your product
- Agencies that use your product and help you sell it to their clients
- Resellers who distribute and sell your product directly to their customers

Depending on the types of partners you work with, partnerships can support acquisition, retention and revenue across every stage of the SaaS funnel — but only if you have the tools to support it.



Most partner relationship management (or PRM) software is built to handle only a single type of partner, usually affiliate marketers. Because affiliate marketing has historically been used to market consumer products, PRM software is usually designed for business-to-consumer (B2C) ecommerce businesses, not B2B software companies.



Of course, selling B2B software is very different from selling consumer goods, which means **most PRM software won't work for SaaS.**

- SaaS is often sold on a subscription basis, but most PRMs only track a single conversion — a sale — making it difficult to measure performance and reward partners.
- Growing a SaaS partner program requires recruiting quality partners familiar with your industry. Most PRMs leave the responsibility of finding, recruiting and engaging partners completely up to you.
- SaaS companies can benefit from running multiple partner programs that support every stage of their funnel. Most PRMs, built for B2C affiliates, only drive top-of-funnel traffic.



Choosing PRM software built on an outdated consumer affiliate model will prevent you from scaling partnerships revenue to its fullest potential.

Most PRM software... 	A B2B partnerships platform should... 
✗ Won't help you build your program strategy	✓ Help build and launch your program — quickly
✗ Does nothing to help you recruit more partners	✓ Promote your program to partners and make it easy for them to join
✗ Doesn't have built-in tools for automated partner messaging	✓ Automate partner onboarding and engagement to maximize sales
✗ Require manual payments that waste your (and your finance team's) time	✓ Pay partners automatically and accurately, with support for multiple reward models
✗ Track single, one-time conversions, like a click or sale — not subscriptions	✓ Track every conversion across the entire marketing and sales funnel
✗ Manage just a single partner channel, like affiliates	✓ Let you scale partnerships across multiple channels of any kind

Getting up and running

Getting up and running

Whether you're looking to launch a new partner program or upgrade the program(s) you run today, you'll want to ensure you work with a platform and a team that can get you up and running fast.

There are a number of strategic and technological factors that can affect how long it takes to migrate or launch a program. The more prepared you are to address each factor, the faster you can get your program live on your new partnerships platform of choice. You'll want to choose a platform provider that can help you get prepared.

Factors that affect time to launch

Strategic factors

- Clear goals for program(s)
- Plan for partner recruitment
- Partner onboarding resources

Dedicated partner manager

Technological factors

- Complexity of new program(s)
- Data migration from current platform
- Integrating to existing tech stack

Dedicated development resources

While partnerships will likely have many stakeholders within your team, having **at least one person dedicated to managing the program** and **one person dedicated to development and integrations** within your team will help you avoid bottlenecks that could delay your launch.

The importance of support

While features and price are likely at the top of your platform shopping checklist, you'll also want to put serious consideration into the quality of onboarding and support you'll receive from the platform you'll use almost every day. And that's going to depend on the team behind the platform.

The relationship you have with the team behind the platform will determine your ability to truly optimize the tools and features of the platform, get the assistance you need in a timely manner, and take advantage of industry insights and best practices.

Quality of Support

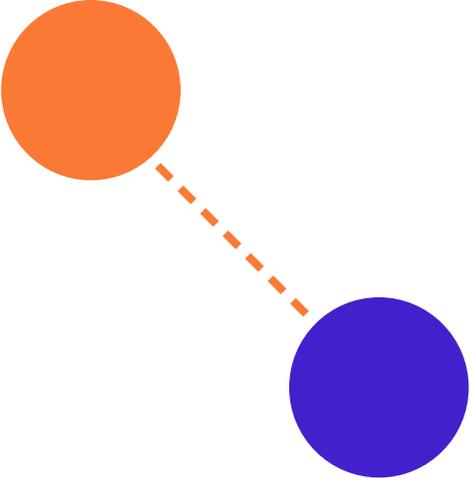
PartnerStack's support is rated #1 for partner management software.

That's one reason why new programs on PartnerStack are typically **live within 4 to 6 weeks.**



A decorative graphic on a blue background featuring several circles in orange, teal, and dark blue. Some circles are solid, while others are hollow. Dashed lines connect some of the circles, forming a network-like structure. The text "Recruiting the right partners" is centered in white.

Recruiting the right partners



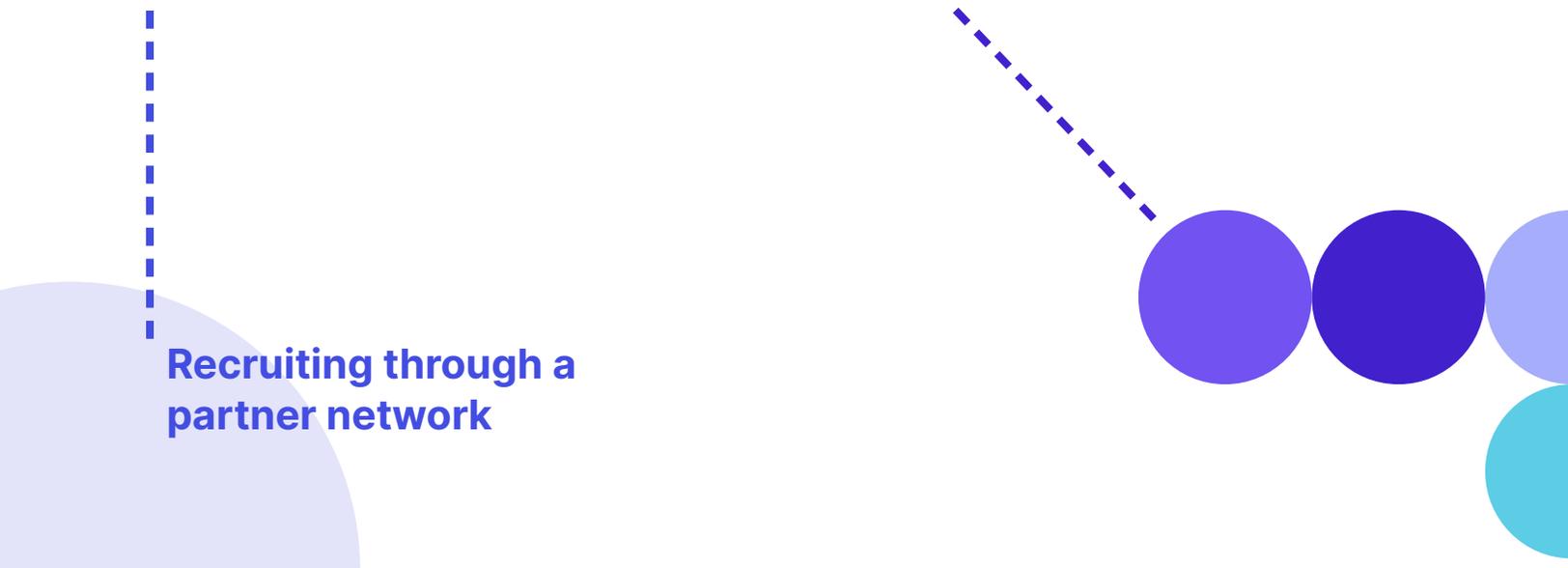
Recruiting the right partners

One of the toughest parts of launching or scaling a partner program is recruiting qualified partners into it and making sure they drive revenue.

Yet when reviewing partner management software, you'll notice that most of them don't include any built-in tools to help you recruit more partners into your program, or reach partners who already work in relevant industries that could be a good fit for your product.

When choosing a partnerships platform, ask yourself:

Is this platform going to help me recruit more of the right partners?



Recruiting through a partner network

Partner networks bring large numbers of partners together and give them access to joining multiple types of partner programs from a single site. In theory, partner networks are a great way to get your program in front of way more partners than you can through your own marketing alone, because they put your program in front of partners where they already are.

The problem with partner networks is the same as with most PRMs: they're built for B2C ecommerce programs, and attract solely affiliate partners that want to market those types of products.

If you're running a program for a B2B SaaS product, most networks won't give you access to the types of partners you actually want.

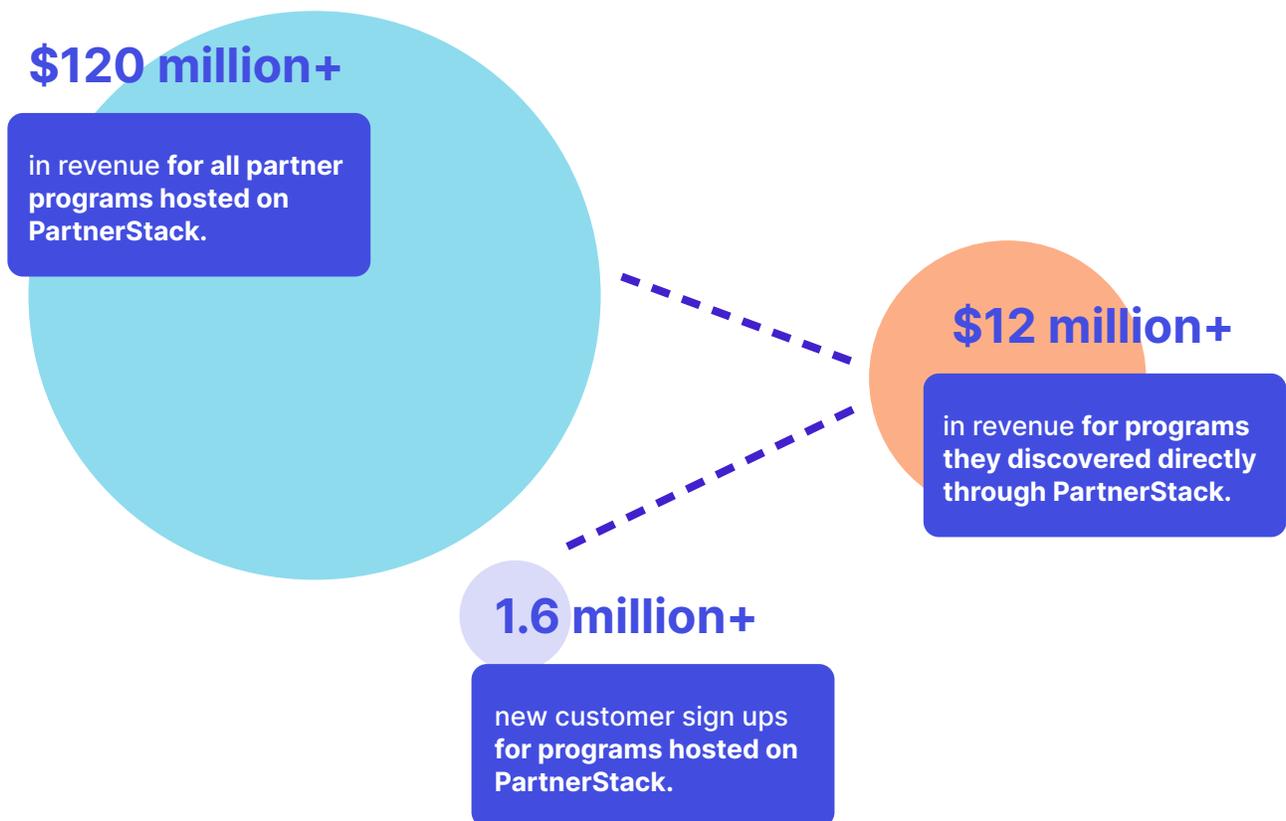


What makes PartnerStack's network unique

PartnerStack is the only partnerships platform that comes with its own built-in network of partners of all types — from affiliates to agencies and resellers — to promote your program to.

With the ability to reach the 65,000+ active partners already using PartnerStack to market and sell B2B SaaS products, recruiting through the PartnerStack network lets you greatly accelerate partner acquisition and revenue with zero risk.

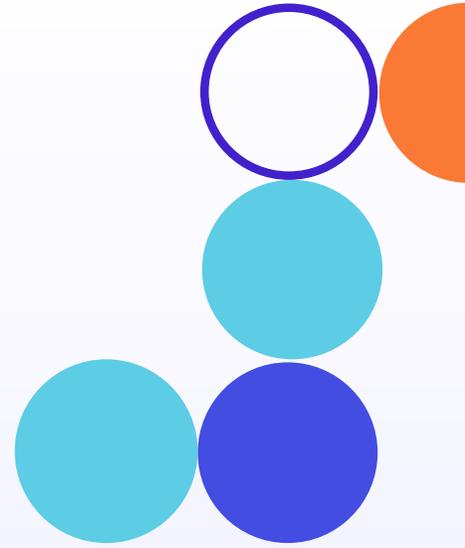
In the past year, PartnerStack's partner network drove...



A decorative graphic on a light blue background. It features several circles in orange, purple, and yellow. Some circles are solid, while others are hollow. Dashed lines connect some of the circles, forming a network-like structure. The text 'Automating partner payments' is centered in the upper half of the page.

Automating partner payments

Automating partner payments



Paying out partners can end up being the single most frustrating and time-consuming part of managing a partner program... if you're not prepared for it.

Without an automated payments process, partnerships managers (and their colleagues) end up spending dozens of hours a month cross-referencing spreadsheets, calculating payments and making sure they get submitted.

A manual payment process introduces a high opportunity for error, leading to inaccurate and delayed payments that cost your business even more time and money, and erode trust with your partners.

That's why, ideally, **your partnerships platform should automate the entire payments process** by:

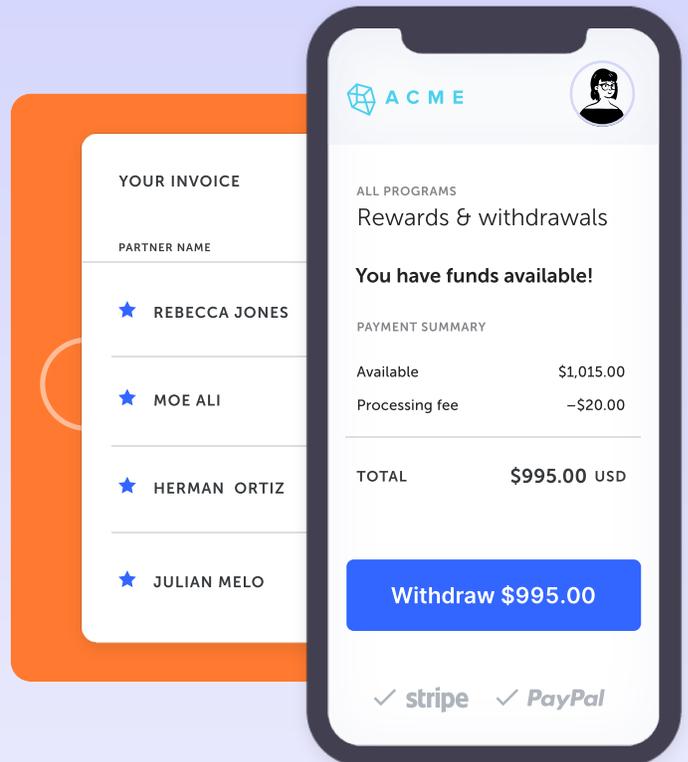
- letting you build flexible offers for partners
- automatically determining when partners earn rewards
- letting partners withdraw payments whenever they want



It's difficult to compare how different types of partnerships software handle automating partner payments, because surprisingly, only PartnerStack does.

When you're inside PartnerStack, you can build offers that reward partners once they meet certain conditions, like selling a subscription to your product, or upgrading their referred customers to a higher plan.

Once partners achieve the conditions you set, you don't need to do anything else: your partners can withdraw their rewards whenever they're ready.



PartnerStack has been a huge improvement from our manual referral process. Before PartnerStack, paying out our referrals required Salesforce, Typeform, GiftCards.com, Google Sheets, and a lot of manual emails. It was inefficient, disorganized, and the payout process took months. PartnerStack has centralized our referral program.

Koby L
Digital Marketing Manager

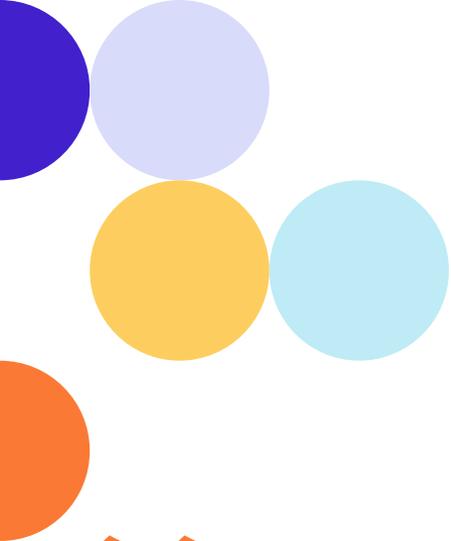
✓ **Verified Review** 

Building partner offers

Providing compelling offers is a crucial part of recruiting the right partners and keeping them engaged.

PartnerStack makes it easy to build whatever kinds of offers you want by breaking them down into four simple components:

Event	Rules
<p>What the partner is being rewarded for, most commonly:</p> <ul style="list-style-type: none">• Customer created: a new customer registration is attributed to the partner. This could be a free or paid customer depending on your product.• Transaction created: a transaction with measurable value is attributed to the partner.	<p>Set more specific criteria for the types of events that trigger the offer, such as:</p> <ul style="list-style-type: none">• the value of the transaction• the duration of the customer's subscription• the specific product or add-on being sold• bonuses for passing specific sales goals
Offer type	Offer amount
<p>Determines whether the amount paid out the partner is a:</p> <ul style="list-style-type: none">• a flat amount, e.g. \$50 per customer signup• a percentage of the transaction value, e.g. 20% of the subscription revenue	<p>The specific dollar or percentage amount that will be paid to the partner once all the conditions of the offer are met.</p> <p>You can choose whether an offer requires manual approval, or a time delay, before the reward is made available to partners for withdrawal.</p>



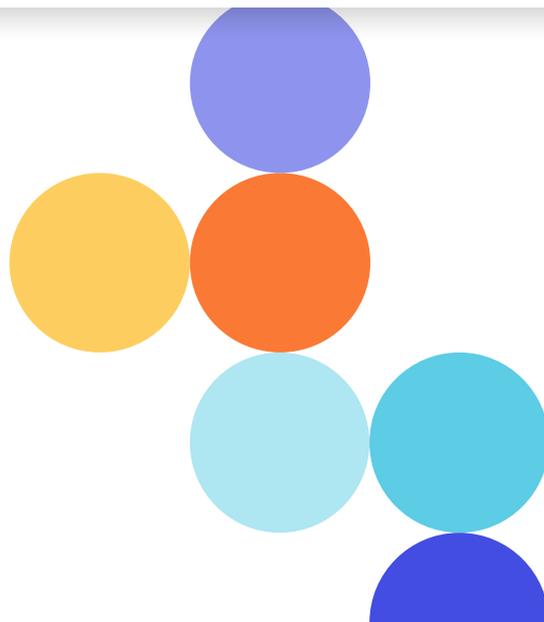
I like the fact that PartnerStack allows you to fine-tune your programs in a very detailed way, create multi-level payout scenarios based on either flat rate or percentage, as well as create complex if-then conditions with triggers pertaining to the customer, transaction or partnership.

For instance, you can create an ascending compensation system that rewards affiliates based on the number of customers, amount of revenue, number of transactions and dozens of other conditions.



George V
Sales Manager

✓ **Verified Review** 



Examples of automated partner offers

These are some of the most common types of offers that SaaS partner programs make available to partners, and how they're set up to be automatically triggered in PartnerStack.

Reward 20% for every sale		Reward \$50 for every paid signup	
Event	Transaction created	Event	Customer created
Rules	None	Rules	Customer Transaction count Equal to 1
Offer type	Percentage	Offer type	Flat
Offer value	20%	Offer value	\$50

Reward 30% for customer's first 12 months, and 20% after

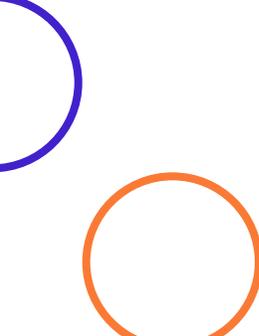
Offer #1 — for first 12 months		Offer #2 — activates after 12 months	
Event	Transaction created	Event	Transaction created
Rules	Customer Age in years Younger than 1	Rules	Customer Age in years Older than 1
Offer type	Percentage	Offer type	Percentage
Offer value	30%	Offer value	20%

Where does the data come from?

PartnerStack connects directly to most CRM and database tools to track customer and transaction data across the entire lifetime of the customer. Plus, the PartnerStack API makes it possible to sync data between PartnerStack and any data source you want, including your own product.

A decorative graphic on a light blue background. It features several colored circles: an orange circle at the top left, a purple circle below it, a yellow circle on the left side, and another orange circle in the middle. Dashed lines connect a purple circle at the bottom left to the middle orange circle, and the middle orange circle to a purple circle on the right. There is also a purple circle at the top right.

Prioritizing the partner experience



Prioritizing the partner experience

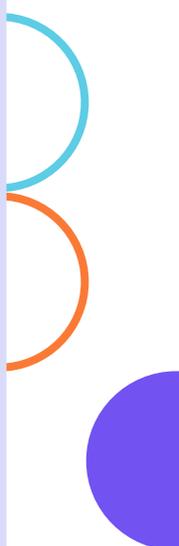
A great partnerships platform doesn't simply make it easier for you to manage your program. It makes it easier for your partners to succeed in your program, keeping them engaged and driving more long-term revenue.

But that's only if you pick a platform with a **built-in partner portal**, which gives partners their own tailored interface to sign into, completely separate from what you use to manage your programs.

A well-designed partner portal provides partners with a seamless experience from application to payments, along with access to resources, reports, bonus rewards and more.

The partner portal checklist ✓

Ask the below questions when reviewing different partnerships software to ensure you pick a platform designed to engage and empower partners.

- Do partners have their own dedicated portal or dashboard?
 - Is the interface appealing and easy-to-use for partners?
 - Can you segment partners and customize their experience?
 - Is it easy to customize the program application form?
 - Is there a place to host resources for partners?
 - Can partners see their own reports and data?
 - Can partners message you directly from the portal?
 - Can you promote special offers and rewards to partners?
 - Can partners withdraw their own payments?
- 

PartnerStack tracks the performance of every partner not just for us, but for the partner themselves, and if partners have questions or feedback, they can message me directly through the PartnerStack dashboard. That combination of visibility and instant communication helps us meet the unique needs of every partner.

PartnerStack has been essential in building a scalable process for onboarding, engaging and rewarding partners, with a team that's supported us immensely as we've grown partnerships into a major acquisition channel.



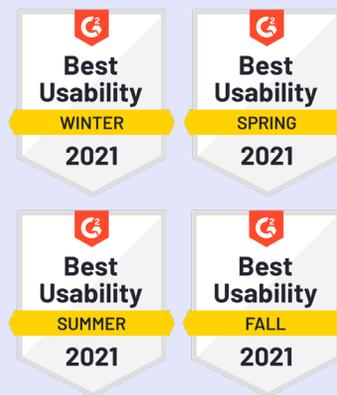
Anca Bujor
Channel Partnerships Manager

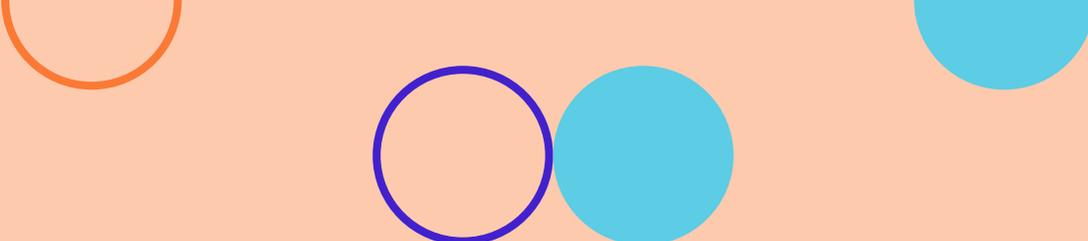


[See how Unbounce drives 25% of trial signups from 5,000+ partners in the full case study →](#)

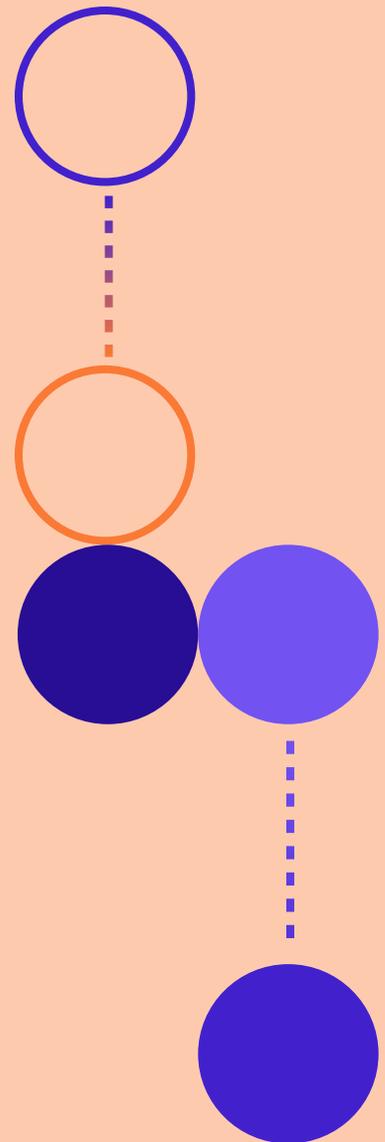
G2 Affiliate Marketing Usability Index

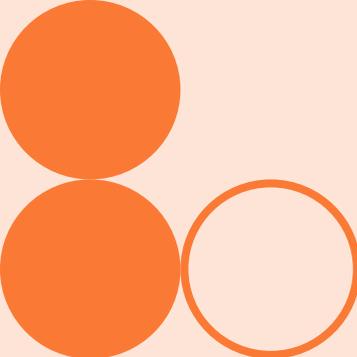
PartnerStack is easy to use for both program managers and partners, which is why it's been the **#1 rated affiliate marketing platform for usability for four consecutive quarters**.





Scaling up with automation



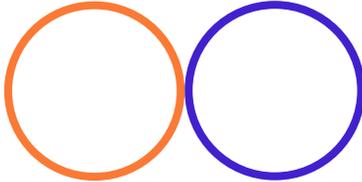


Scaling up with automation

Payments are just one part of partnerships you can automate. To continuously scale your program without having to constantly grow your team, you'll want to automate as much of it as possible.

Not only does automation help you scale faster, it frees up time to focus on building relationships with partners and improving your program strategy.

Challenge	How automation helps
Recruiting qualified partners	Promote your program directly to partners in the PartnerStack network
Onboarding new partners	Send automated emails based on partner performance and behavior
Educating and empowering partners	Build certification courses that partners complete at their own pace
Avoiding fraudulent partners and transactions	Built-in fraud suite that automatically detects suspicious partner behaviour and withholds rewards
Identifying and growing key partner segments	Automatically move partners to different groups or tiers based on performance



The team at PartnerStack helped us understand the data and build an automated program that supports our partners and our business.



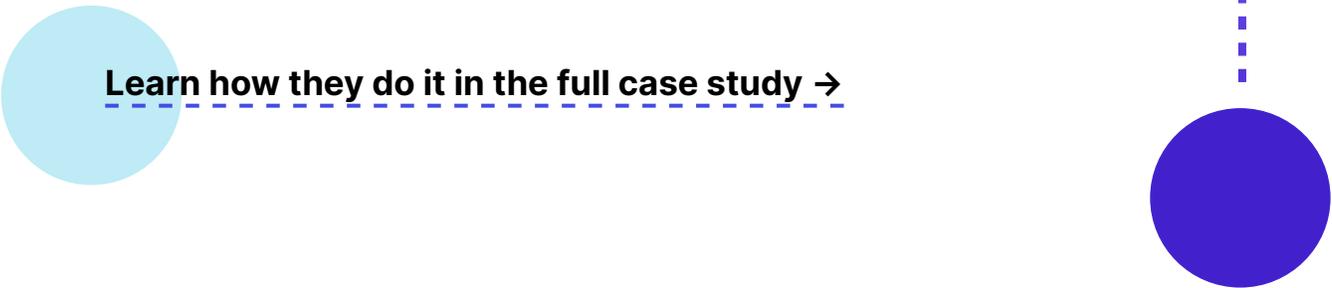
Matthew Sison
Growth Manager



Looka uses PartnerStack and the power of automation to:

- Get access to data on the performance of over 5,000 partners
- Automatically segment partners into tiers based on performance
- Send automated messages to partners that help them level up
- Ask partners for feedback directly inside their partner dashboard

With this automated approach, Looka was able to **scale its partner program to drive a third of the company's overall profits.**



[Learn how they do it in the full case study →](#)

Conclusion

Throughout this guide, we've shared what we see as the top priorities in picking a partnerships platform and how we've built PartnerStack to deliver on them.

But as we covered at the very start, we know it's not enough for a product vendor to tell you what the right decision is. (Even if that product vendor is us.)

So our final piece of advice in picking a partnerships platform: read reviews from real customers on sites like G2 to see what users actually have to say about each product, and the priorities that matter to you.

[Affiliate marketing software reviews on G2 →](#)

[Partner management software reviews on G2 →](#)

Just remember: you're choosing a platform not just for yourself and your internal team, but for every partner you work with. You'll want to pick a partnerships platform that empowers your partners as much as it empowers you.

Because when your partners succeed, your business does too.

See for yourself why people love working with PartnerStack.

Get a personalized demo with a member of our team and see the PartnerStack platform in action.

[Book a demo →](#)



Migrating to another platform is always a daunting process... well, not so with the folks over at PartnerStack.

I had a ton of questions in the initial stages, and they were there with all of the answers.

These folks know their stuff.



Zulfi Moon
Partnerships Manager

omnisend

✓ **Verified Review**

On the customer service side of things, **we have never (ever!) experienced such a smooth and effective onboarding** process, with each of the PartnerStack team members being responsive and helpful on our journey.



Nancy Mai Harnett
Partner Marketing Specialist

teamwork.

✓ **Verified Review**

About the data

Why G2?

G2 is the world's largest tech marketplace that allows buyers to make informed decisions based on authentic reviews and feedback from users and customers.

Spring 2021 G2 Lists

The lists we reference in this report are based on data from over one million authentic, verified reviews, written and published between January 1, 2019 - March 3, 2020. Each review considered in these lists was vetted by a real person to ensure legitimacy — spanned across 77,381 software products.

Other sources

[CSO Insights. \(2018\) The Growing Buyer-Seller Gap: Results of the 2018 Buyer Preferences Study \[White paper\].](#)

[Demand Gen Report. \(2020\) B2B Buyer Behavior Study \[White paper\].](#)

[Forrester. \(2011\) Using Social Media and Online Communities to Engage With B2B Tech Customers \[Webinar\].](#)

Specifically, we've referenced the following G2 lists:

- Grid® Report for Partner Management | Spring 2021 (1st/19)
- Usability Index for Affiliate | Spring 2021 (1st/10)
- Top 50 Products for Sales 2021
- Top 100 Fastest Growing Products 2021
- Momentum Grid® Report for Affiliate | Spring 2021 (1st/9)
- Momentum Grid® Report for Partner Management | Spring (1st/13)