



# The Momentum Partner Marketing Catalogue

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# PARTNER MARKETING REIMAGINED

## Strategic Partner Marketing Solutions for the AI Era

### **Sherpa's Comprehensive Guide to Driving Partner Revenue Through Intelligent, Smarter Marketing**

#### **Introduction from Tom Perry – CEO - Sherpa Welcome to our new Partner Marketing Catalogue.**

Sherpa has spent the last 12 months analyzing the global Partner Marketing environment, including assessing the marketing capabilities, tech stacks and alignment of 21,000 technology partners – it's been a heavy lift!

But it has armed us with a set of unique insights into to what is working in the new era of AI, what partners are expecting and demanding of their vendor partners, and importantly, how to scale programs that deliver results in this new marketing environment

We are very proud of the products and services contained within this catalogue – they are the best of breed and utilize the very latest tools. Our products sit expertly, alongside your existing infrastructure and processes and ensure you are driving return on existing investments.

This catalogue will exist as a living document updated as trends become apparent, technology updates and processes have to adapt to deliver meaningful, ROI driven Partner Marketing.



# THE CHALLENGE OF PARTNER MARKETING IN THE AI ERA

The landscape of Partner Marketing has fundamentally shifted. Traditional approaches, mass email campaigns, generic content, and one-size-fits-all strategies, no longer cut through the noise in a world where buyers are inundated with AI-generated content and automated outreach.

## THE MODERN PARTNER MARKETER'S DILEMMA:

- **Signal vs. Noise:** Buyers receive hundreds of Partner Marketing touches weekly, most generated at scale with little personalization
- **The Attribution Gap:** Partners struggle to demonstrate ROI on marketing investments, leading to budget cuts and misaligned expectations
- **Resource Constraints:** Partner Marketing teams are lean, yet expected to support dozens, sometimes hundreds, of partners simultaneously
- **The AI Paradox:** While AI promises efficiency, it's also commoditizing generic content, making authentic, strategic marketing more valuable than ever

## WHAT'S CHANGED:

The AI era hasn't made marketing easier, it's made \*strategic\* Partner Marketing more critical. Buyers can spot templated content instantly. They expect personalization, relevance, and genuine value. Partner Marketing must evolve from broadcast campaigns to precision orchestration and leverage the vertical specializations and relationship strength held by Partners.

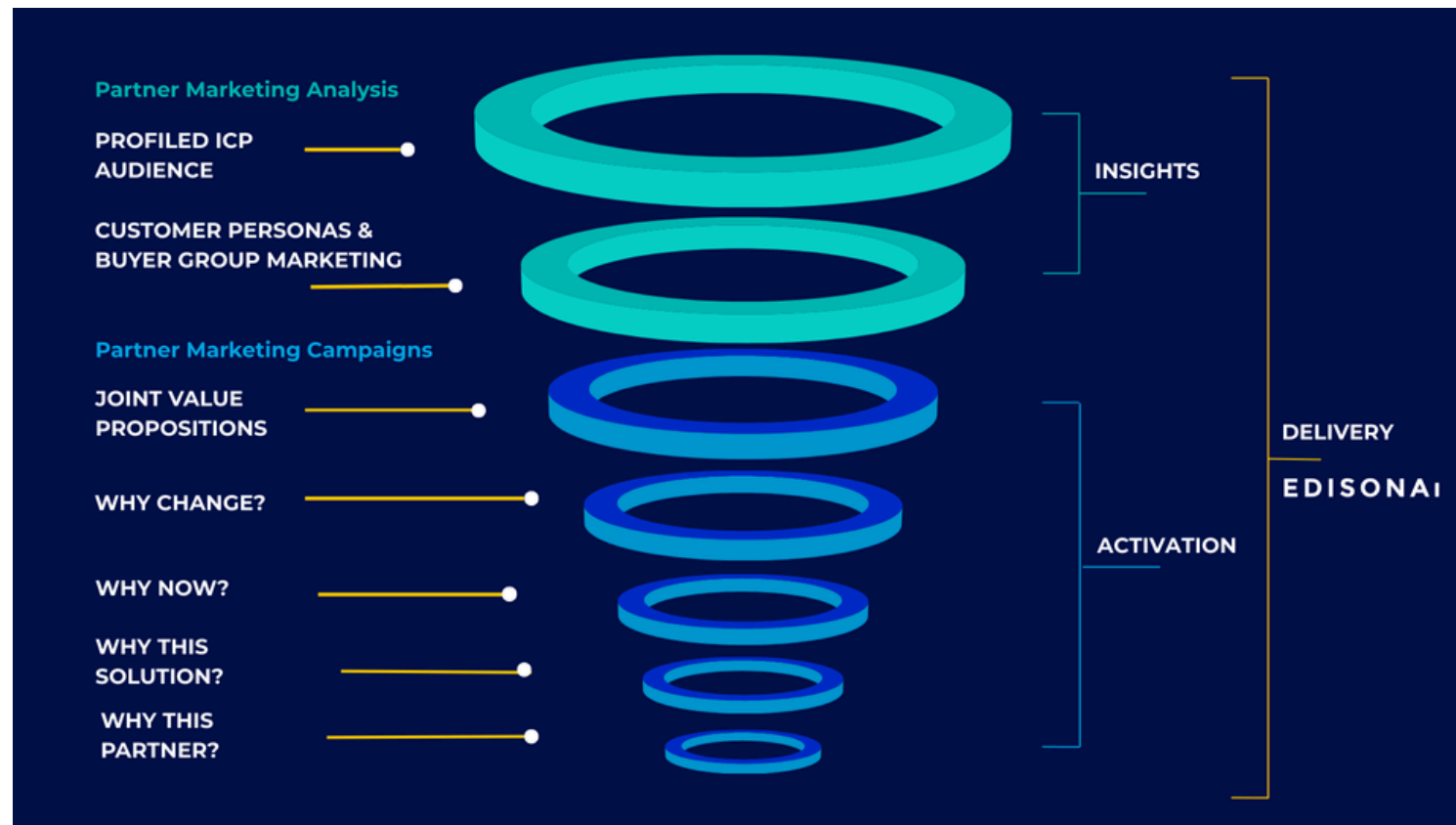
This is where Sherpa comes in.



# THE NEW PARTNER MARKETING FUNNEL

## A FRAMEWORK FOR MODERN PARTNER SUCCESS

Traditional marketing funnels focus on moving prospects from awareness to purchase. The new Partner Marketing funnel recognizes a different reality: most prospects aren't ready to buy, partner resources are constrained, and long-term relationship building matters more than quick conversions.



# OUR PRODUCTS

INSIGHTS	ACTIVATION CORE	ACTIVATION BOLT ONS	DELIVERY
<b>I1: Partner Marketing Analysis</b> Real-time signals revealing in-market accounts	<b>A1: Top of Funnel Campaign</b> Kick start your marketing engagement	<b>A5: Buyer Group Marketing</b> Identify and market to the Buyer Group	<b>D1: Partner Content Hub</b> Centralized, branded content libraries for partner enablement
<b>I2: Full Channel Assessment</b> To understand Partner potential beyond marketing and looking at overall market capability	<b>A2: Middle of Funnel</b> Increase velocity and engagement through MOF relationship activities	<b>A6: Appointment Setting</b> High-value appointments that drive revenue in the right context!	<b>D2: Partner Lead Hub</b> Our Ai driven lead platform – built for today's Partner Marketing
	<b>A3: Full Funnel</b> Deliver full funnel marketing for Partners	<b>A7: Webinar &amp; Event Marketing</b> Condensed event support marketing scaled using Ai	<b>D3: Partner Concierge</b> Hands-on execution when partners need capacity
	<b>A4: ABM campaigns for Tier 1 and Strategic Partners / GSI's.</b> Orchestration – For specialist and verticalized Partners.	<b>A8: Content – JVP Program</b> Joint Value Propositions at scale for Partners	
	<b>A9: For Partner Marketing</b> Centralized demand creation and lead distribution to Partners		



# INSIGHTS PRODUCTS

Understanding where to focus and when to engage. Using our EdisonAI Assessment technology to drive Partner Marketing ROI.

# II: PARTNER MARKETING ANALYSIS

## Visualize Your Partners Marketing Capability

### THE SOLUTION:

Sherpa's Partner Marketing Analysis uses our proprietary EdisonAI Assessment technology to deliver comprehensive, real-time insights into Partner Marketing performance. We analyze campaign effectiveness, partner capability, lead quality, and pipeline impact when coupled with campaign activation across your entire channel ecosystem. Our assessment reveals which partners are performing, which campaigns are driving results, and where to optimize your investment for maximum ROI.

### WHAT'S INCLUDED:

- Comprehensive Partner Marketing performance audit using EdisonAI
- Campaign effectiveness analysis and partner engagement scoring
- Lead quality assessment and pipeline attribution tracking
- Actionable recommendations report with prioritized optimization opportunities

### TYPICAL RESULTS:

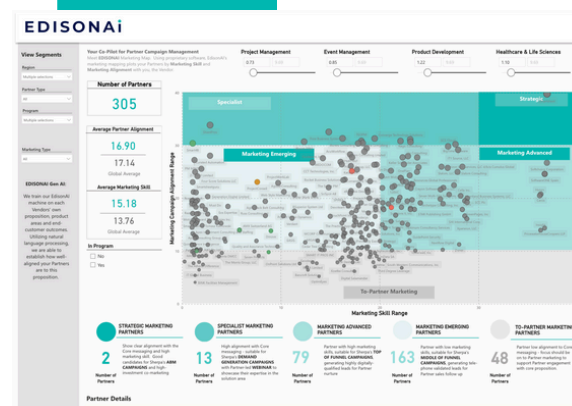
- 25-35% improvement in marketing ROI through data-driven optimization
- 40-50% reduction in wasted spend on underperforming tactics
- Clear attribution of revenue to specific Partner Marketing initiatives

### TIMELINE:

- 1 Week
- Ongoing engagement: Monthly or quarterly reporting cadence

### BEST FOR:

Partner Marketing leaders needing to demonstrate ROI, organizations with multiple active partner programs requiring optimization, teams preparing annual budget planning, new Partner Marketing VPs establishing baseline performance metrics.



## I2: FULL CHANNEL ASSESSMENT

**Deep account insights that inform targeting and messaging**

### THE SOLUTION:

Sherpa's Full Channel Assessment provides a comprehensive evaluation of your entire partner ecosystem using EdisonAI technology. We analyze partner performance, program structure, market coverage, competitive positioning, and operational effectiveness. The assessment delivers a strategic roadmap for channel optimization, identifying high-potential partners, revealing program gaps, and recommending structural improvements that drive measurable revenue growth.

### WHAT'S INCLUDED:

- Complete partner ecosystem mapping and segmentation analysis
- Individual partner performance evaluation and scoring
- Market coverage analysis and white space identification
- Strategic roadmap with 90-day, 6-month, and 12-month priorities

### TYPICAL RESULTS:

- 30-40% increase in channel revenue through strategic focus
- Identification of 3-5 high-potential partners for investment
- Clear segmentation enabling differentiated partner strategies

### TIMELINE:

- Total timeline: 6-8 weeks for comprehensive assessment
- Follow-up: Quarterly check-ins on roadmap execution

### BEST FOR:

Organizations with 10+ partners lacking clear strategy, channel leaders new to role requiring comprehensive baseline, companies experiencing flat or declining partner revenue, businesses preparing for channel expansion or restructuring, executive teams requiring channel program business case.





# ACTIVATION PRODUCTS

Executing campaigns that reach and engage target buyers

# A1: TOP OF FUNNEL CAMPAIGN

## Building awareness and capturing early-stage demand

### THE SOLUTION:

Sherpa's Top of Funnel Campaign builds sustainable awareness and demand generation through strategic, multi-channel execution. Using the Momentum framework, we identify your ideal buyer personas, craft compelling value propositions, and orchestrate coordinated campaigns across email, content syndication, and digital advertising. Our approach focuses on quality over quantity, attracting prospects who match your ideal customer profile and showing genuine research intent.

### WHAT'S INCLUDED:

- Target audience definition and ideal customer profile development
- Multi-channel campaign strategy and creative asset development
- LinkedIn advertising, email nurture sequences, and content syndication
- Campaign performance tracking and weekly optimization

### TYPICAL RESULTS:

- 60-100 leads per partner depending on market size
- 3-5% landing page conversion rates on gated content
- 40-60% reduction in cost per lead versus prior campaigns

### TIMELINE:

- 13 Week Minimum

### BEST FOR:

Partners launching new solutions or entering new markets, organizations with inconsistent pipeline requiring demand generation foundation, sales teams needing consistent lead flow, companies building brand awareness in competitive markets.

# A2: MIDDLE OF FUNNEL CAMPAIGN

## Nurturing prospects and accelerating pipeline velocity

### THE SOLUTION:

Sherpa's Middle of Funnel (MOF) campaign systemically drives engagement through Active Intent CTA's. We develop multi-touch nurture sequences that provide value at each stage, address common objections, and build buying confidence. Our campaigns combine educational content, case studies, product demonstrations, and targeted sales outreach, all orchestrated to move prospects toward decision-making.

### WHAT'S INCLUDED:

- Buyer journey mapping and multi-touch nurture sequence development
- Active Intent CTA's that include Partner Content for middle of funnel and retargeting campaigns
- Lead scoring refinement and sales handoff criteria
- Pipeline velocity tracking

### TYPICAL RESULTS:

- 30-40% increase in MQL to SQL conversion rates
- 20-25% reduction in average sales cycle length
- 2-3x improvement in lead engagement scores

### TIMELINE:

- 13 Week minimum

### BEST FOR:

Organizations with strong top-of-funnel but poor conversion, partners with long sales cycles requiring sustained engagement, teams lacking systematic nurture processes, sales organizations wanting more qualified pipeline.

# A3: FULL FUNNEL CAMPAIGN

## Integrated campaigns from awareness to decision

### THE SOLUTION:

Sherpa's Full Funnel Campaign delivers comprehensive, integrated marketing from initial awareness through closed-won deals. Using the complete Momentum framework, we orchestrate coordinated campaigns across all funnel stages - building awareness, nurturing engagement, and driving decisions. Every touchpoint connects strategically, creating seamless prospect experiences that build momentum toward purchase.

### WHAT'S INCLUDED:

- Comprehensive buyer journey mapping and integrated campaign strategy
- Multi-channel top-of-funnel demand generation and middle-funnel nurture
- Bottom of funnel tactics to sales enablement with full-funnel attribution
- Monthly optimization based on performance data

### TYPICAL RESULTS:

- 40-60% improvement in overall marketing ROI
- 50-70% increase in marketing-sourced pipeline
- 25-30% reduction in customer acquisition cost

### TIMELINE:

- 13-26 Weeks

### BEST FOR:

Organizations ready for comprehensive marketing transformation, partners with budget for integrated approach, companies with mature sales processes, teams requiring predictable pipeline generation, businesses preparing for significant growth phases.

# A4: ABM CAMPAIGN ORCHESTRATION

## Coordinated multi-touch campaigns across buying committees

### THE SOLUTION:

Sherpa's ABM Campaign Orchestration targets high-value accounts with precision, coordinating multiple touches across entire buying committees. Using Momentum methodology and EdisonAI insights, we identify target accounts, map buying committees, develop role-specific messaging, and orchestrate coordinated engagement across email, LinkedIn, direct mail, advertising, and sales outreach.

### WHAT'S INCLUDED:

- Strategic Account selection for One to One or Few or One to Many ABM using EdisonAI intent signals
- Buying committee identification and persona-specific messaging
- Multi-channel campaign orchestration and account-level engagement tracking
- Sales enablement and weekly account status reviews

### TYPICAL RESULTS:

- 3-5x higher engagement rates versus non-ABM campaigns
- 40-50% faster sales cycles through buying committee engagement
- 30-40% higher win rates on targeted accounts

### TIMELINE:

- 6 Months

### BEST FOR:

Enterprise sales targeting Fortune 1000 accounts, complex B2B solutions requiring buying committee consensus, partners with defined target account lists, organizations with 6+ month sales cycles, teams ready for account-based approach.

# A5: BUYER GROUP MARKETING

## Targeting specific vertical or functional buyer segments

### THE SOLUTION:

Sherpa's Buyer Group Marketing creates specialized campaigns for specific verticals, functions, or buyer segments. Using Momentum methodology, we develop deep expertise in your target buyer groups, their challenges, priorities, regulations, and buying behaviors. We craft tailored messaging, create segment-specific content, and execute targeted campaigns that demonstrate genuine understanding.

### WHAT'S INCLUDED:

- Buyer group research and segment-specific messaging
- Tailored content development and targeted campaign execution
- Vertical-specific sales enablement and competitive intelligence
- Segment performance tracking and optimization

### TYPICAL RESULTS:

- 50-70% higher engagement from target buyer groups
- 35-45% improvement in conversion rates versus generic campaigns
- 2-3x higher deal values from well-qualified vertical prospects

### TIMELINE:

- 13 Weeks minimum

### BEST FOR:

Partners targeting specific verticals (healthcare, financial services, manufacturing), solutions with strong functional appeal (CFO, CISO, COO), organizations entering new market segments, companies facing vertical-specialist competitors, teams ready to focus on high-value segments.

# A6: APPOINTMENT SETTING

## Qualified meetings with decision-makers

### THE SOLUTION:

Sherpa's Appointment Setting service delivers a consistent flow of qualified meetings with decision-makers. Using Momentum methodology, we handle the entire appointment setting process, prospect research, multi-touch outreach, objection handling, and calendar booking. Our team acts as an extension of your sales organization, using sophisticated cadences and personalization to secure meetings with prospects who match your ideal customer profile.

### WHAT'S INCLUDED:

- Ideal customer profile definition and prospect research
- Multi-touch outreach sequences and personalized emails
- Phone follow-up
- Pre-meeting briefing documents and weekly pipeline reports

### TYPICAL RESULTS:

- 20-40 qualified meetings per month depending on market and offer
- 60-70% show rates on scheduled appointments
- 15-25% conversion from meeting to qualified opportunity

### TIMELINE:

- 13 Weeks

### BEST FOR:

Sales teams needing consistent meeting flow, organizations launching new solutions requiring market validation, partners lacking internal SDR capacity, companies with high-value deals justifying meeting investment, teams wanting sales focused on closing not prospecting.

# A7: WEBINAR & EVENT MARKETING

**Expert-led virtual and in-person events that educate and convert**

## **THE SOLUTION:**

Sherpa's Webinar & Event Marketing transforms events into strategic pipeline generation engines. Using Momentum methodology, we manage the entire event lifecycle, from topic selection and speaker coaching to promotion, production, and post-event nurture. We focus on creating genuine educational value, ensuring professional execution, and systematically converting attendees into qualified opportunities.

## **WHAT'S INCLUDED:**

- Strategic topic selection
- Multi-channel promotion campaign
- Real-time engagement facilitation and post-event nurture campaigns
- Lead scoring and event ROI measurement

## **TYPICAL RESULTS:**

- 30-45% registration-to-attendance rates (versus 20-25% industry average)
- 40-60% attendee engagement scores
- 20-25% of attendees request follow-up meetings

## **TIMELINE:**

- 9 Weeks

## **BEST FOR:**

Thought leadership positioning, product launches and demonstrations, educational content topics with broad appeal, customer success showcases, industry expertise demonstration, building brand authority and credibility.

# A8: CONTENT – JVP PROGRAM

## Joint value proposition content and co-marketing programs

### THE SOLUTION:

Sherpa's JVP Content Program creates compelling joint value proposition content and co-marketing initiatives that demonstrate the power of combined solutions. Using Momentum methodology, we develop integrated messaging that articulates unique value only achievable through partnership. We create case studies, solution briefs, joint webinars, and co-branded campaigns that drive demand for the integrated offering.

### WHAT'S INCLUDED:

- Joint value proposition workshop and messaging development
- Co-branded content creation (case studies, solution briefs, guides)
- Joint webinar program and partner co-marketing campaigns
- Sales enablement materials for joint selling

### TYPICAL RESULTS:

- 40-60% increase in joint opportunity creation
- 35-45% higher win rates on co-marketed opportunities
- 25-30% larger deal sizes for integrated solutions

### TIMELINE:

- 13 Weeks

### BEST FOR:

Strategic technology partnerships requiring joint GTM, solution providers with integration partners, channel programs needing to elevate co-selling, organizations with complementary solutions, partners seeking to differentiate through ecosystem value.

# A9: FOR PARTNER MARKETING

## Centralized demand creation and lead distribution to partners

### THE SOLUTION:

Sherpa's For Partner Marketing program creates centralized demand generation specifically designed for partner distribution. Using Momentum methodology and EdisonAI technology, we generate high-quality leads through multi-channel campaigns, then intelligently distribute to appropriate partners based on territory, specialization, and performance. Automated workflows ensure rapid partner notification and systematic follow-up tracking.

### WHAT'S INCLUDED:

- Central demand generation campaign strategy and execution
- Intelligent lead routing and automated partner notification
- Partner engagement tracking and lead quality scoring
- CRM integration and monthly partner performance reviews

### TYPICAL RESULTS:

- 500-2,000 leads distributed quarterly depending on program scale
- 60-70% partner lead acceptance rates (versus 30-40% typical)
- 40-50% of leads contacted within 48 hours

### TIMELINE:

- 3-6 months

### BEST FOR:

Channel-dependent vendors needing to drive partner revenue, organizations with 10+ partners requiring lead distribution, companies launching partner programs and needing demand generation, vendors facing partner complaints about lead flow, teams requiring visibility into partner lead handling.



# DELIVERY PRODUCTS

Providing the infrastructure and expertise to support success

# D1: PARTNER CONTENT HUB

## Centralized, branded content libraries for partner enablement

### THE SOLUTION:

Sherpa's Partner Content Hub delivers a centralized, branded library where partners access current, on-brand marketing materials instantly. Built on modern technology and organized intuitively by buyer stage, use case, and content type, the hub makes finding and using content effortless. Automated updates ensure partners always have the latest assets.

### WHAT'S INCLUDED:

- Custom partner portal design and content organization
- Partner co-branding tools and automated version control
- Usage analytics and reporting dashboards
- Partner training and mobile-responsive design

### TYPICAL RESULTS:

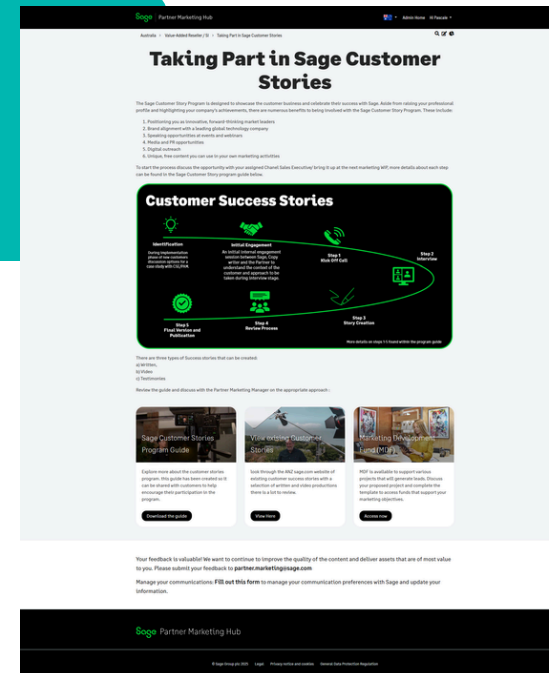
- 3-4x increase in partner content utilization
- 60-70% reduction in ad-hoc content requests
- 50-60% faster partner campaign launches

### TIMELINE:

- Build 4 weeks
- Ongoing: Continuous with monthly content additions

### BEST FOR:

Channel programs with 10+ partners needing content access, organizations with inconsistent partner branding, vendors with frequent content updates, companies lacking partner content visibility, teams preparing for channel expansion requiring scalable enablement.



## D2: PARTNER LEAD HUB

### Intelligent lead distribution and management for partner ecosystems

#### THE SOLUTION:

Sherpa's Partner Lead Hub provides intelligent, automated lead distribution and management purpose-built for channel ecosystems. Using EdisonAI technology and Momentum methodology, the hub routes leads to appropriate partners based on territory, specialization, capacity, and performance. Automated workflows ensure rapid partner notification and systematic follow-up tracking.

#### WHAT'S INCLUDED:

- Intelligent lead routing engine with customizable rules
- Automated partner notification and lead delivery
- Partner follow-up tracking and lead recycling process
- Real-time performance dashboards and CRM integration

#### TYPICAL RESULTS:

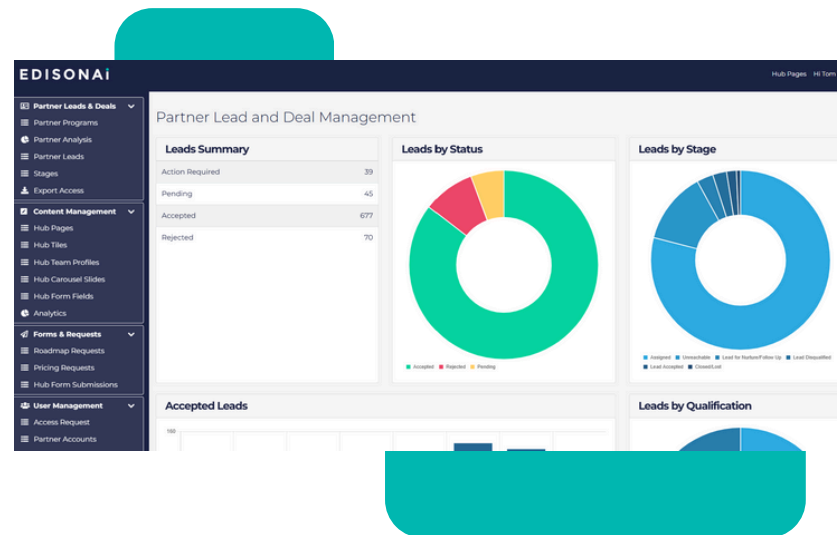
- 70-80% reduction in lead routing time (hours versus days/weeks)
- 60-70% partner lead acceptance rates
- 50-60% of leads contacted within 24-48 hours

#### TIMELINE:

- Build 4 weeks
- Time to first lead distribution: Week 6

#### BEST FOR:

Vendors generating centralized leads for partner distribution, channel programs with lead quality and follow-up challenges, organizations lacking partner lead visibility, companies with 5+ partners requiring systematic distribution, teams needing to prove marketing ROI through partner channel.



## D3: PARTNER CONCIERGE

### Dedicated Partner Marketing support and strategic guidance

#### THE SOLUTION:

Sherpa's Partner Concierge provides dedicated marketing support and strategic guidance for your most important partners. Acting as an extension of your Partner Marketing team, our concierge specialists provide hands-on assistance with campaign planning, execution support, strategic advice, and problem-solving. Partners get responsive, knowledgeable help when they need it.

#### WHAT'S INCLUDED:

- Dedicated Partner Marketing specialist assignment
- Proactive partner outreach and campaign planning support
- Hands-on execution assistance and quarterly business reviews
- Best practice sharing and monthly performance reporting

#### TYPICAL RESULTS:

- 40-50% improvement in partner satisfaction scores
- 30-40% increase in Partner Marketing activity and engagement
- 25-35% growth in revenue from supported partners

#### TIMELINE:

- 3 months

#### BEST FOR:

Strategic partners requiring dedicated support, high-value partnerships driving significant revenue, channel programs with capacity-constrained Partner Marketing teams, organizations with complex partner needs, companies seeking to elevate partner experience and satisfaction, vendors preparing major partner initiatives requiring hands-on guidance.



# WHY SHERPA

## THE NATURAL CHOICE FOR PARTNER MARKETING EXCELLENCE

Partner Marketing is fundamentally different from traditional B2B marketing. It requires specialized expertise, proven methodology, and technology purpose-built for channel ecosystems. For over 12 years, Sherpa has been the trusted partner for enterprise technology vendors—from Verizon and Microsoft to Cisco, SAP, and AWS—delivering measurable Partner Marketing ROI.

### HERE'S WHY LEADING VENDORS CHOOSE SHERPA:

- ✓ **PROVEN PARTNER MARKETING EXPERTISE**
- ✓ **ENTERPRISE TECHNOLOGY PEDIGREE**
- ✓ **THE MOMENTUM FRAMEWORK: DATA-DRIVEN METHODOLOGY**
- ✓ **MEASURABLE ROI AND ACCOUNTABILITY**
- ✓ **EDISONAI TECHNOLOGY: INTELLIGENCE THAT DRIVES RESULTS**
- ✓ **PARTNER ENABLEMENT AND ECOSYSTEM EXPERTISE**
- ✓ **COMPREHENSIVE SOLUTION PORTFOLIO**
- ✓ **SCALABLE, FLEXIBLE ENGAGEMENT MODEL**

### THE BOTTOM LINE

Partner Marketing is too important to leave to generalists. You need a partner who lives and breathes channel marketing, brings proven methodology and technology, delivers measurable results, and has the enterprise pedigree to execute at your level.

**That partner is Sherpa.**  
**Let's build momentum together.**



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 [www.thesherpagroup.com](http://www.thesherpagroup.com)

 [tomperry@thesherpagroup.com](mailto:tomperry@thesherpagroup.com)

 +1 844 638 0270 | +44 1234 964 000