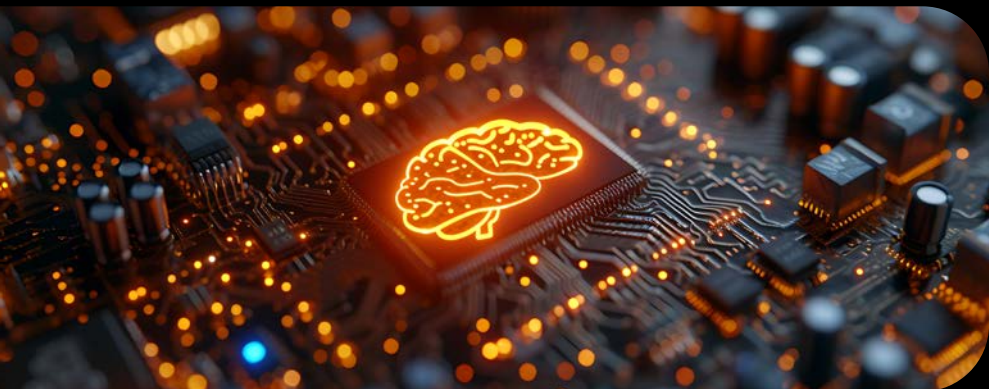AI Partner Playbook:

Accelerating Ecosystem Growth with Actionable Intelligence

Real-world strategies, tools, and prompts to **activate AI in your partner program** from top ecosystem experts around the globe.
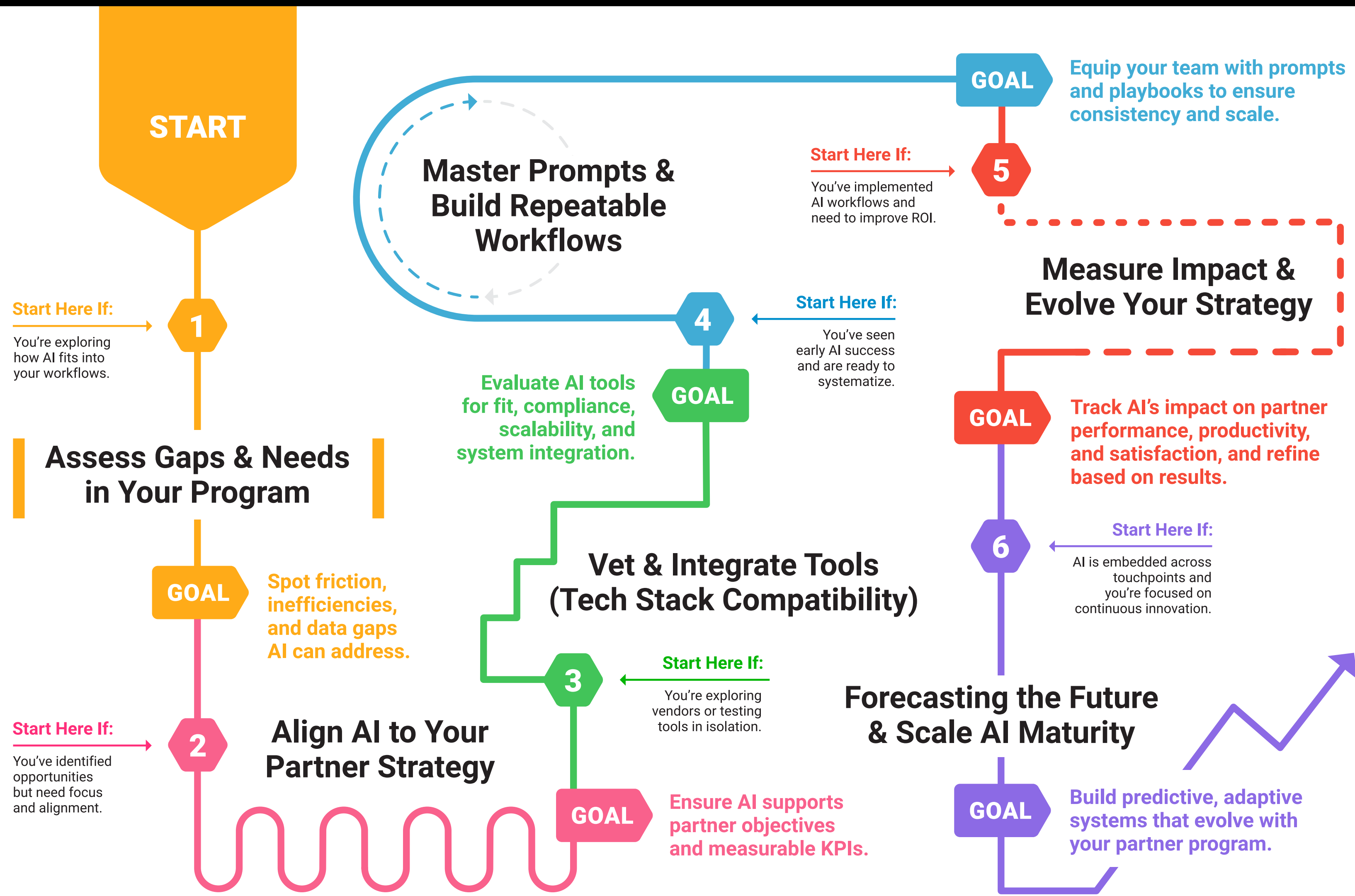
IMPARTNER

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IMPARTNER

Start Here: Your AI Journey for Partner Success

START

Start Here If:
You're exploring how AI fits into your workflows.

1

Assess Gaps & Needs in Your Program

GOAL
Spot friction, inefficiencies, and data gaps AI can address.

Start Here If:
You've identified opportunities but need focus and alignment.

2

Align AI to Your Partner Strategy

GOAL
Ensure AI supports partner objectives and measurable KPIs.

Master Prompts & Build Repeatable Workflows

Start Here If:
You're exploring vendors or testing tools in isolation.

3

Vet & Integrate Tools (Tech Stack Compatibility)

GOAL
Evaluate AI tools for fit, compliance, scalability, and system integration.

Start Here If:
You've seen early AI success and are ready to systematize.

4

GOAL
Equip your team with prompts and playbooks to ensure consistency and scale.

Start Here If:
You've implemented AI workflows and need to improve ROI.

5

Measure Impact & Evolve Your Strategy

GOAL
Track AI's impact on partner performance, productivity, and satisfaction, and refine based on results.

Start Here If:
AI is embedded across touchpoints and you're focused on continuous innovation.

6

Forecasting the Future & Scale AI Maturity

GOAL
Build predictive, adaptive systems that evolve with your partner program.

IMPARTNER

Artificial Intelligence is transforming partner programs, from onboarding and enablement to co-marketing, sales support, and ecosystem strategy. But success with AI requires more than curiosity; it calls for a deliberate step-by-step approach that aligns tools, people, and processes with strategic goals. Whether you're assessing your current state, launching pilots, or scaling proven workflows, this roadmap will guide you in building smarter, faster, and more resilient partner programs.

Milestones for Strategic Transformation

Use this roadmap to identify where you are—and what's next. Each step moves you closer to a future-ready, AI-augmented partner ecosystem.

How to Use This Map

This roadmap is designed to help partner leaders:

- Benchmark their AI adoption stage
- Identify the next best steps for growth
- Prioritize high-impact initiatives
- Drive internal alignment across functions

Download the full AI Journey Map PDF to keep this visual guide on hand and share it with your team.

Download the AI Journey Map

Executive Summary

As artificial intelligence (AI) reshapes the future of work, partner leaders are under increasing pressure to deliver smarter, faster, and more scalable results. But while the potential of AI is immense, translating that potential into real outcomes within a partner program requires strategic alignment, the right tools, and tested approaches that cut through the hype.

Impartner's AI Partner Playbook brings together insights from some of the top minds in the ecosystem: leaders, strategists, and advisors who are already putting AI to work across onboarding, co-marketing, partner communications, sales enablement, and beyond. Whether you're just beginning to assess where AI fits into your program or you're scaling advanced workflows, this guide delivers actionable intelligence designed to meet you where you are and take you further.

This playbook goes beyond trends to deliver a tactical roadmap featuring vetted toolkits, actionable prompts, real-world use cases, and proven integration strategies. With contributions from leaders at AI Partnerships, Atlassian, Bridge Partners, Canalys, Coro, Crossbeam, Gitlab, Impartner, Is Inspired a Tier1 Company, Microsoft, Partner1, Partnerships in Play, Spur Reply, TD SYNNEX, and The Power of Partnering, the guide provides insights to build replicable systems and generate measurable impact.

canalys

"Review each channel organization employee, **have them recommend workflows, processes, or partner logic** that are low hanging fruit for automation and better data strategy."

Jay McBain
Chief Analyst
Canalys

ATLASSIAN

"**Understand your data first.** If your data is not organized and accurate, do not turn to AI agents or AI tools as you will be learning from bad data."
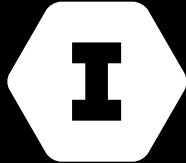
Komal Shah
Head of Global Channel Operations
Atlassian

TD SYNNEX

"There's a growing shift in the number of reseller partners utilizing AI to **better understand which solutions to bring forward to their end-user customers,** as more vendor platforms adopt AI capabilities."

Matt Karst
VP New Vendor Acquistion – North America
TD SYNNEX

Strategy First

Where AI Fits In Your Partner Program

Before diving into tools or prompts, you need a strategy. AI's value in partner programs starts with understanding your goals, identifying friction points, and prioritizing outcomes.

1 Common High-Impact Use Cases

Use Case	Strategic Value
Partner Onboarding & Enablement	Automate workflows, personalize enablement journey at scale, and tailor training content to partner roles and personas.
Co-Marketing & Campaign Execution	Generate campaign assets, localize content at scale, personalize outreach, and optimize timing based on performance signals.
Recruitment & IPP Optimization	Dynamically evolve Ideal Partner Profiles using performance, intent, and ecosystem signals to source and prioritize high-fit partners.
Partner Communications	Draft, localize and tailor communications across segments and geographies.
Partner Sales Support	Summarize key assets, product updates, and customer stories; tailor pitch materials by vertical and use case.
Partner Ops & Intelligence	Synthesize structured and unstructured data to uncover performance blockers, trends, and whitespace.
Ecosystem Strategy & Analysis	Identify trends, competitors, and opportunities using internal and external data.

2 Where AI Can Deliver Strategic Lift

- Uncovers insights from complex or scattered partner data
- Automates repetitive tasks like onboarding and reporting
- Personalizes content and outreach at scale
- Improves partner targeting and recruitment
- Boosts team productivity through AI-assisted workflows
- Identifies and clears execution bottlenecks

> "
> **"It all starts with the data:** We were training agents to help our team get a 360 degree view of customer accounts. This isn't necessarily partner-specific, but partner data is a critical dimension of that 360-degree picture."
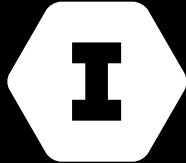
Bob Moore
CEO
Crossbeam

CROSSBEAM

3 Checklist: Is Your Team Ready for AI?

☑ **Do you have clean, accessible partner and program data?**
AI needs quality input. Without it, you're scaling noise.

☑ **Are your partner-facing workflows documented?**
AI supports structured processes more effectively than ad-hoc ones.

☑ **Have you identified low-risk, high-friction tasks to start with?**
Ideal pilots often include onboarding, internal comms, or basic partner research.

☑ **Does your team have baseline AI fluency and tools access?**
Adoption hinges on enablement. Start with education, not automation.

☑ **Is your AI strategy tied to specific KPIs or partner program goals?**
AI efforts must drive measurable outcomes like time saved or growth.

4 **Common Mistakes to Avoid**

Mistake	Why It's a Problem
Starting with Tools Instead of Goals	Leads to fragmented adoption and unclear value.
Trying to Automate Entire Workflows at Once	Overwhelms teams and increases error risk.
Ignoring Governance and Data Hygiene	Bad data = bad decisions. AI amplifies what you feed it.
Skipping Strategic Alignment with KPIs	AI work must map to measurable business outcomes.
Deploying AI without Cross-functional Input	Leaves out key perspectives and leads to misalignment. Partner teams need to co-create solutions.

Mitigating the Risks
of Rapid Adoption

Is your team ready to scale AI without sacrificing trust or stability?

As AI tools, especially AI Agents, become more autonomous and require greater access to sensitive information, privacy and security risks increase significantly. Without a clear strategy, strong data governance, and realistic expectations, organizations risk fragmented efforts, exposure of sensitive data, and AI missteps that can escalate quickly.

Explore five common risks that can undermine AI adoption and learn how to develop smarter and more resilient strategies.

Explore Five Common Risks

AI Tools Behind the Strategy

Contributors reveal the top tools powering their AI workflows, ranging from writing aids to automation platforms. Here's what they use and why.

Functional Grouping Grid

Function	Tools
Writing + Content	ChatGPT, Claude (Anthropic), Google Gemini, Atlassian Rovo
Automation	Zapier, Clay, Langchain, Synthoni
Communication	Microsoft Copilot, Fathom
Analytics + Ecosystem Intelligence	Crossbeam, PartnerOptimizer, Perplexity, Impartner
CRM + Integration	Fathom (HubSpot integration), Sitecore (AI content delivery), LARA (TD SYNNEX internal AI platform)

"Start with **AI tools that align with your existing corporate strategy** for easier adoption. Key options include OpenAI ChatGPT, Google Gemini, Anthropic Claude for content and research, Microsoft Copilot for Microsoft users, and Perplexity plus PartnerOptimizer for partner ecosystem insights."

Michelle Morgan
Director of Partnerships
Tier1 Performance

TiER1 PERFORMANCE

"**Paid AI tools typically offer stronger privacy and data controls** which helps streamline IT approval. Using AI within trusted IT approved ecosystems such as Copilot for M365 or NotebookLLM for Google Workspace allows for faster and more secure deployment."

Juhi Saha
CEO
Partner1

Partner1

"We meet customers where they are, using top chatbots like Microsoft Copilot, Google Gemini, and ChatGPT for content and research, and custom AI on platforms like Google AI and Azure Foundry for complex, scalable solutions. The key is matching the best AI to each customer's unique needs and tech stack."

Kyrsa Dixon
Senior Director
Bridge Partners

bridge partners

Free vs. Paid AI / AI Adjacent Toolkits

Free (or Freemium) AI Tools

ChatGPT
(Free & Paid)
AI language model for writing, brainstorming, research

Claude
(Free & Paid)
AI writing assistant

FATHOM
(Free & Paid)
AI meeting recording and summarization

Gemini
(Free & Paid)
Multimodal AI for research and content

NotebookLM
(Free & Paid)
AI integrated with Google Workspace

OpenAI
(Free & Paid)
Direct access to AI models for custom apps

perplexity
(Free & Paid)
AI-powered research assistant with live results

Paid AI Tools

Apollo.io
AI sales intelligence

clay
AI lead/contact enrichment

CURSOR
AI-assisted coding tool

Copilot
(Free plan available)
AI embedded in M365 apps

Microsoft Copilot Studio
AI agent builder platform

Azure AI Foundry
MSFT Azure platform to build and deploy AI applications

GitHub Copilot
AI coding assistant for code generation and completion

DuckDuckGo
AI for partner sales/workflow optimization

GPT-5
(Free tier available)
Advanced AI language model for writing, research, and reasoning

GONG
AI conversation intelligence platform

(Microsoft)
Cloud AI platform for models & agents

TD SYNNEX
(LARA Internal platform)
Custom AI model for sales enablement

PARTNER OPTIMIZER
AI for partner identification

synthoni
A TiER1 COMPANY
AI-powered automation for go-to-market teams

Free AI Adjacent Tools

LangChain
(Open source)
Developer framework for building AI apps

zapier
(Free plan available)
Automation platform that can connect AI tools

Paid AI Adjacent Tools

IMPARTNER
Partner management platform that uses AI to optimize workflows

CROSSBEAM
(with AI Copilot, Deal Navigator)
Ecosystem intelligence platform with embedded AI features

Agent Development Kit
(Application Development Kit)
Framework for building AI apps

Rovo
AI-powered search and automation across Atlassian tools (automation focus)

SITECORE
(AI in content delivery)
CMS with AI-driven personalization features

Prompts + Workflows in Action

AI Prompts That Drive Real Results

Discover how teams are using AI prompts across key partner workflows, from recruitment to reporting, to enhance speed, clarity, and scale.

- **Partner Recruitment + Onboarding**
- **Partner Operations & MDF Management**
- **Partner Enablement & Sales Support**
- **Partner Marketing, Content, & Comms**
- **Partner Intelligence & Profiling (IPP)**

ATLASSIAN — Komal Shah

CORO — Heather Harlos

canalys — Jay McBain

TiER1 PERFORMANCE — Michelle Morgan

demand conversion — Michelle Teo

bridge partners — Kyrsa Dixon

TD SYNNEX — Matt Karst

THE POWER OF PARTNERING — Patrick Ferdig

Ai — Neeti Gupta

IMPARTNER — Curtis Brinkerhoff

GitLab — Edward Cepulis

Partner Recruitment + Onboarding

ATLASSIAN

Komal Shah
Head of Global Channel Operations
Atlassian

>_ Prompt

Imagine you are a partner marketing manager launching a new product to a diverse partner community. You need to create enablement materials that clearly communicate the value proposition and key selling points of the new feature. Your partners vary in technical expertise and require tailored guidance on how to understand, sell, and profit from the offering. Provide a multi-tier enablement program that includes different levels of training materials and assessment methods suited to each partner segment.

Use Case

Replaced hours of manual research and comparison building for competitive analysis.

Result

Additional hours saved each week and enabled faster GTM decisions.

Pro Tip

Pair with MS Copilot to quickly turn summaries into board-ready slides.

CORO

Heather Harlos
Vice President
Partner Programs
Coro

>_ Prompt

Serve dynamic content feeds based on mapped user profile types and actual engagements targets.

Use Case

Built dynamic onboarding journeys in Sitecore that adapt in real time based on user behavior and mapped profile types.

Result

Replaced static experiences with adaptive, personalized interactions, driving a faster path to revenue.

Pro Tip

Start with a measurable process like onboarding. Use AI to personalize it with relevant tasks and content for each user profile.

Partner Operations & MDF Management

>_ Prompt

Our partner team needs help optimizing the Market Development Funds (MDF) claims process. Currently, it's highly manual and tedious, involving multiple steps such as collecting proof of performance, validating invoices, submitting forms, and following up for reimbursement. We also work with partners of varying sizes and levels of sophistication, so we need a process that is more scalable, transparent, and user-friendly.

I'll provide information on the tools we're using, anonymized examples of claims, forms, emails, and the current process steps. I'll also share a snapshot of MDF claims and processing times where available. Please analyze this information to:

- Identify key sources of bottlenecks and inefficiencies
- Suggest specific steps or workflows that could be automated or streamlined
- Recommend how AI (e.g., document parsing, workflow routing, summarization) could reduce effort
- Propose a cleaner, more scalable process
- List tools, workflows, or roles we should consider

The goal is to simplify the process for both partners and internal teams, while maintaining compliance, financial accuracy, and visibility.

Michelle Morgan
Director of Partnerships
Tier1 Performance

TiER1 PERFORMANCE

Use Case

Mapped process inefficiencies and applied AI to design a scalable MDF workflow with automated data validation and document handling.

Result

Reduced manual workload, accelerated reimbursement timelines, and improved visibility across teams.

Pro Tip

Start with messy ops; AI excels at cleaning up repetitive, rule-based processes.

Partner Enablement & Sales Support

IMPARTNER

Curtis Brinkerhoff
Chief Revenue Officer
Impartner

>_ Prompt

Using my PRM data, please tell me the average response time to a lead and close rate by partner and the steps taken to close that opportunity. Please include the number of emails and calls logged in the analysis. Rank this by partner from most success to least success.

Use Case

Analyzes PRM data to uncover insights on partner performance and opportunity collaboration. This helps identify gaps in deal tracking and reveals unexpected top-performing partners, enabling earlier and more aligned collaboration

Result

Revealed critical data gaps and unexpected partner successes, highlighting areas to fix and improving partner collaboration to drive more revenue.

Pro Tip

Align processes early to transform passive opportunity tracking into active partner collaboration that creates market differentiation.

---

demand conversion

Michelle Teo
Founding Partner
Demand Conversion
co-creator of
Partnerships in Play

>_ Prompt

For lean teams that don't want to pay for a full AI stack but want to leverage the benefits for partner enablement. Use AI for dynamic and hyper tailored partner enablement resources and talk tracks:

1. Use your CRM to create a repository for call transcripts and relevant case studies.

2. Create AI tasks to monitor competitor signals like changes in pricing, product updates, messaging changes.

3. Use AI to generate hyper tailored sales objections, talk tracks, and battle cards, segmented into different roles, teams, competitors. Pull out the most relevant proof points i.e. 1 to 2 supporting lines about what we have done recently for similar sized companies in the same vertical.

Use Case

Used AI to generate tailored talk tracks and objection handling based on CRM data and competitor signals. Partners applied them before, during, and after calls.

Result

Improved sales relevance and boosted partner confidence.

Pro Tip

Start with measurable, repeatable processes like onboarding or objection handling.

Partner Marketing, Content, & Comms

Kyrsa Dixon
Senior Director
Bridge Partners

bridge partners

>_ Prompt

START PROMPT

Joint E-book Draft Generation

Role

You are an AI assistant specialized in content creation, specifically tasked with drafting comprehensive e-books for joint product solutions developed by strategic partners. You'll act as a meticulous content architect, ensuring all generated material adheres strictly to established structures and partner co-marketing guidelines.

Goal

Your core goal is to produce a high-quality, co-branded e-book draft by seamlessly integrating strategic insights and research from both partner organizations into a unified narrative. This e-book will serve as a foundational marketing asset to promote the joint solution.

Context

Your process begins by systematically collecting critical information from both partner teams: the joint solution's combined Messaging & Positioning Framework (MPF), detailed target audience insights, and relevant market research. You will engage the user to gather this input step-by-step.

Once this information is assembled, you will expertly map and populate it within a predefined E-book Template Outline, which serves as your ultimate structural authority from a dedicated knowledge source. Any generated content must fit precisely within this template. If any section of the template cannot be adequately filled due to insufficient provided content, you will clearly flag it for the user.

Your final output will be a ready-to-use co-branded e-book draft, maintaining the exact structure and order of the template while reflecting the integrated voice and value of both partners.

To begin drafting your e-book, please provide the joint solution's Messaging & Positioning Framework (MPF). You can share a document, links, or simply copy and paste the content here. If you don't have it, just let me know.

END PROMPT

Use Case

The prompt powers a BridgeIQ AI agent that speeds up co-marketing asset creation by quickly drafting eBooks and key content.

Result

Campaign build time was reduced by ver 40%, allowing more campaigns to launch faster without sacrificing quality or needing extra staff.

Pro Tip

Create a library of AI agents for different content types in your GTM workflow to boost speed, alignment, and quality.

Partner Intelligence & Profiling (IPP)

Jay McBain
Chief Analyst
Canalys

canalys

Prompt

Get the LinkedIn URL for each partner. Finding out their employee size, 1-year and 2-year growth numbers, how they describe themselves, and the categories they choose are invaluable.

Use Case

Supports ideal partner profiling and total addressable market (TAM) analysis by enriching partner data with real-time LinkedIn insights. This helps prioritize partners based on capacity and capability.

Result

Improved IPP accuracy and partner selection by leveraging deeper, data-driven profiling.

Pro Tip

Combine external data sources like LinkedIn with your PRM to enrich partner profiles for smarter recruitment and segmentation.

Neeti Gupta
PhD candidate
Founder and CEO
AI Partnerships

Prompt

Give me the links for:

- Google Cloud – 20 agentic AI use cases across Finance, Healthcare, Tech, CPG+, and more.
- OpenAI – 20 AI agent use cases across Strategy, Research, Data Analysis, Coding, and more.
- Deloitte – 20 GenAI use cases across Energy, Consumer, Government, Life Sciences, and more. [etc.]

Need these actual links from these company websites.

Use Case

Supports competitive intelligence and GTM validation by surfacing enterprise-grade AI use cases from top providers. This prompt accelerates research workflows, helping teams benchmark product direction against what's already been validated in the market.

Result

Accelerated research from days to hours, improving product bets, partner conversations, and alignment with market needs by validating that internal roadmaps match external enterprise demand.

Pro Tip

Tag use cases by sector, function, and AI type (e.g., agentic, generative) to spot whitespace opportunities and guide roadmap decisions.

Partner Intelligence & Profiling (IPP)

Patrick Ferdig
Founder and Principal
Consultant
The Power of Partnering

THE POWER OF PARTNERING

>_ Prompt

We often work with large lists of companies and need to tailor our engagement based on the company type. This prompt helps identify which type of partner we're dealing with:

Determine the company type based on the following information:

Name:

Website:

LinkedIn Profile:

Description:

Scrape the website and LinkedIn profile to gather more details.

Definitions:

ISV: Company that makes and sells software or SaaS solutions (may reference "platform" or "solution" in their content).

Agency: Company that sells professional, consulting, or implementation services (may be called a systems integrator).

Rules for output:

If the company is an ISV, output exactly: ISV

If the company is an Agency, output exactly: Agency

If it cannot be determined, output exactly:

Other

Important: Output only the company type (ISV, Agency, or Other). No additional text.

Use Case

Uses Clay to run this prompt at scale, automatically categorizing partners so outreach messaging can be customized without manual research.

Result

Replaced manual partner-type identification, saving hours per account and enabling more targeted engagement.

Pro Tip

Automate partner profiling early. This quick win helps personalize communications and boosts outreach efficiency.

Partner Intelligence & Profiling (IPP)

TD SYNNEX

Matt Karst
VP New Vendor
Acquistion – North America
TD SYNNEX

>_ Prompt

Provide a list of key technology competitors to [insert company name] and display a chart showing the differentiators with each company's solutions.

Use Case

Used Microsoft Copilot to analyze competitor positioning and automate comparison charts to inform onboarding recommendations.

Result

Enabled a clear comparison, helping business units make informed decisions about onboarding a new company.

Pro Tip

Use MS Copilot to turn AI summaries into board-ready visuals and speed up decision-making.

GitLab

Edward Cepulis
Sr. Director, Channel
Programs & Enablement
GitLab

>_ Prompt

Which partner in [X region] has experience with [Y] or experience in [Z industry]?

Use Case

Used Claude to process and analyze partner data from Impartner, including profiles, success stories, deal registrations, and service documentation. This transformed siloed information into structured, actionable insights.

Result

Replaced static spreadsheets with dynamic partner intelligence that enabled faster, more targeted partner identification.

Pro Tip

Centralize all partner data. AI can analyze more variables than manual methods and quickly surface top performers or capability gaps.

The AI Stack + Integration

AI Stacks in Action

Across partner operations, marketing, and enablement, diverse AI stacks combine powerful models like GPT-4, Claude, and Copilot with CRM and PRM platforms, workflow automation, and custom agents.

These solutions tackle key challenges by automating alerts, speeding up claims processing, accelerating campaign delivery, and enhancing partner insights. Together, they demonstrate how AI is driving faster execution, better decision-making, and measurable results in real-world applications.

Here's a look at how some of our contributors are putting AI to work. →

1 **What's Actually Powering Partner Ops?**

	Patrick Ferdig	Kyrsa Dixon	Levi Lauck	Michelle Morgan
AI Models & Tools	OpenAI Anthropic Gemini Clay Google Agent Developer Kit (ADK)	Copilot Gemini ChatGPT BridgeIQ GTM Agent Library Content Draft Agents	ChatGPT-o3 GPT-4o Cursor Bolt Copilot Studio Vertex AI Agent Builder	ChatGPT Gemini Claude Microsoft Copilot Perplexity PartnerOptimizer
Integrations	Salesforce CRM, Sitecore, Impartner PRM, Zapier, and APIs across systems.	HubSpot CRM, Zapier, Notion DB Content Hubs, and PRMs.	PRM as a system of record, like Impartner, Figma, and StackBlitz Multi-latency integrations.	Salesforce or HubSpot CRM, PRM platforms, Data Warehouse, MDF claims systems, Core GTM stack like M365, Teams, etc.
Data Sources & Outcomes	• Partner profiles, deal registrations, sales pipeline • Real-time alerts, automated workflows, and dashboards • Faster deal engagement, dynamic enablement, data enrichment	• Campaign messaging frameworks and GTM plans • Through-partner content enablement data • 40% faster campaign delivery and better partner reach	• Workflow metadata, SLAs, and partner tiers • Auto-approvals and triage logic • Faster SLA cycles and AI-driven proposal generation	• MDF claims data, invoice proofs, content eng. and onboarding performance • Improved ROI visibility, targeting, and faster processing • Data hygiene, enrichment, and validation at scale

2 Considerations for Implementation

Privacy
☑ Ensure sensitive partner data is securely handled and compliant with regulations.

Compliance
☑ Choose tools that meet industry standards like SOC 2 or GDPR.

Ease of Use
☑ Favor platforms that require minimal technical resources and integrate smoothly with existing workflows.

Scalability
☑ Build systems that grow with partner complexity and data volume.

"**Create an easy button in your CRM system** that automatically enriches your partner data based on a series of prompts including IPP evaluation, scoring, and creation of a partnership value proposition."

Patrick Ferdig
Founder and Principal Consultant
The Power of Partnering

THE POWER OF PARTNERING

"**You'll want to evaluate the tools** like any other technology in your stack with some added criteria: Are the outputs accurate and relevant? Can you provide quality inputs? Is it easy to prompt, or does it require technical skill? Are there legal or data privacy concerns tied to training or using the outputs?"
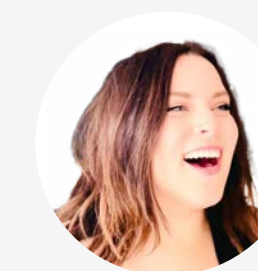
Lauren Helstab
Founder at More Than One Way
co-creator of Partnerships in Play

more

"**Choose AI tools that prioritize** privacy and security, integrate easily with your existing systems (like your CRM), and allow for smooth data migration in and out. Without these safeguards, you risk compromising both security and operational speed."

Juhi Saha
CEO
Partner1

△ Partner1

3   Inside Impartner's Orchestration Studio

Powering Partner Success with AI and Beyond

At the core of scalable partner operations lies one powerful enabler: **Impartner's Orchestration Studio.**

As a flexible workflow engine, built for leading partner teams and channel programs, the solution connects disparate tools, automates key partner motions, and transforms manual processes into intelligent, scalable systems.

Voice Your Deal

Skip the form and use your voice to create deal records. Please record the details of the deal you would like to register.

⏹ Stop Recording

0:13

Recording in progress...

Recording Transcript

I'd like to register a deal for the company Delavan manufacturing for the amount of $45,000 with an expected closed day of October 15th 2025

What sets Orchestration Studio apart is its ability to connect directly to AI tools, allowing partner leaders to build smarter workflows that learn, adapt, and deliver results at scale.

Connecting AI Through Orchestration Studio

When paired with AI, Orchestration Studio becomes your intelligent execution layer connecting data, triggering responses, and delivering impact across the partner lifecycle. Common applications include:

Use-Case	What It Does	Why It Matters
AI-Driven Deal Registration	Captures partner-submitted deal information via voice notes, Slack messages, or emails, then uses AI to parse the details and auto-submit to your PRM and CRM.	Eliminates form fatigue and reduces time-to-registration, making it easier for partners to submit deals and for teams to act quickly.
Smart Virtual Assistant Integration	Embeds large language model (LLM) chatbots into the Impartner portal to deliver instant, context-aware answers to partner questions. Orchestration Studio handles data routing, logging, and response delivery.	Equips partners with self-serve access to accurate sales and product info boosting confidence, reducing support burden, and speeding up deal cycles.
Pipeline Intelligence	Surfaces AI-powered insights on deal momentum, intent signals, and missing data, then activates automated workflows for follow-up and forecasting.	Keeps deals moving by reducing manual tracking, improving forecast accuracy, and helping partners focus on the highest-value opportunities.

Power Beyond AI

Real-World Automations with Orchestration Studio

Impartner's Orchestration Studio isn't just for AI. It's your behind-the-scenes engine for automating the daily motions that power scalable, repeatable partner success, no coding required.

> " IMPARTNER
>
> "AI in Orchestration Studio turns raw partner data into proactive recommendations and **keeps the entire ecosystem moving at the speed of opportunity.**"

Levi Lauck
Senior Product Manager
Impartner

Here's how partner leaders are putting it to work:

Use-Case	What It Does	Why It Matters
Partner Application Management	Streamlines the partner application process, from submission to approval, by automating reviews, notifications, and assignments.	Reduces onboarding friction and accelerates time-to-partner productivity.
Data Synchronization Across Ecosystems ROI-Driven Partner Engagement	Connects your PRM to your CRM, ERP, and third-party tools, ensuring data flows seamlessly across systems	Keeps partner records aligned, minimizes manual updates, and improves operational accuracy.
ROI-Driven Partner Engagement	Automates engagement based on program performance signals (e.g., inactivity, top-performer status).	Increases partner activation and retention while driving growth with less overhead.
Partner Action Triggers	Kicks off alerts or follow-up tasks based on specific partner behaviours or milestones (e.g., new deal, training completed).	Keeps internal teams aligned and proactive, no more missed handoffs or partner stalls.
Cross-Functional Team Handoffs	Seamlessly moves partners through lifecycle stages—onboarding to enablement to revenue—by triggering internal workflows.	Reduces chaos, improves accountability, and delivers consistent partner experiences.
CRM Sync Error Notifications	Automatically flags and alerts partner managers when sync issues occur between systems like Salesforce and Impartner.	Fixes errors fast, protects partner trust, and ensures nothing falls through the cracks.

The Outcome?

Smarter Ecosystems, Less Work

With Orchestration Studio, partner leaders can finally connect the dots between strategy, systems, and execution. Whether you're enriching workflows with AI or simply automating manual steps, the results are tangible:

☑ Faster deal cycles with automated triggers and enriched data

☑ Smarter partner experiences through AI assistants and dynamic content

☑ Reduced operational overhead and fewer manual handoffs

☑ Higher partner satisfaction, better data, and improved program performance

From AI-powered assistants to time-saving automations, Orchestration Studio is how Impartner helps ecosystem teams do more with less.

> "When you mix in AI with the power of Orchestration Studio, optimal partners are approved and enabled faster, deal reviews are accelerated, and health scores can update in real time. CAMs should be spending their day building partner pipeline, not chasing paperwork."
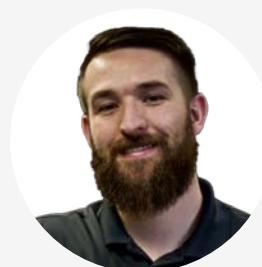
Levi Lauck
Senior Product Manager
Impartner

IMPARTNER

Create Harmony in Your Partner Data With Orchestration Studio

See it in Action

Maturity Model + Future Forecast

The AI Maturity Curve:
6 Stages of Ecosystem Transformation

Explore

Pilot
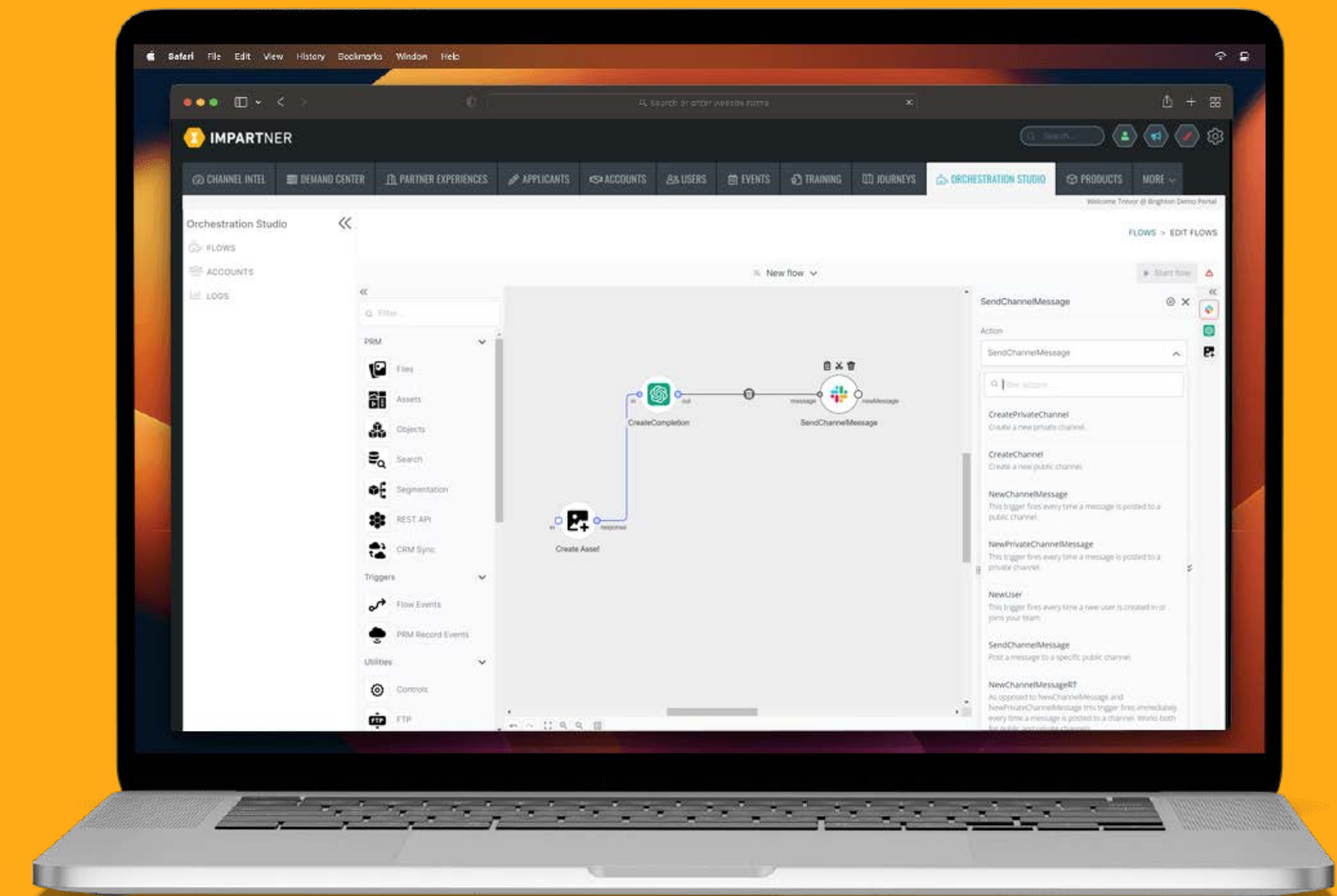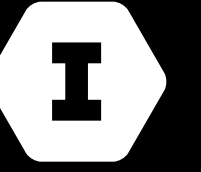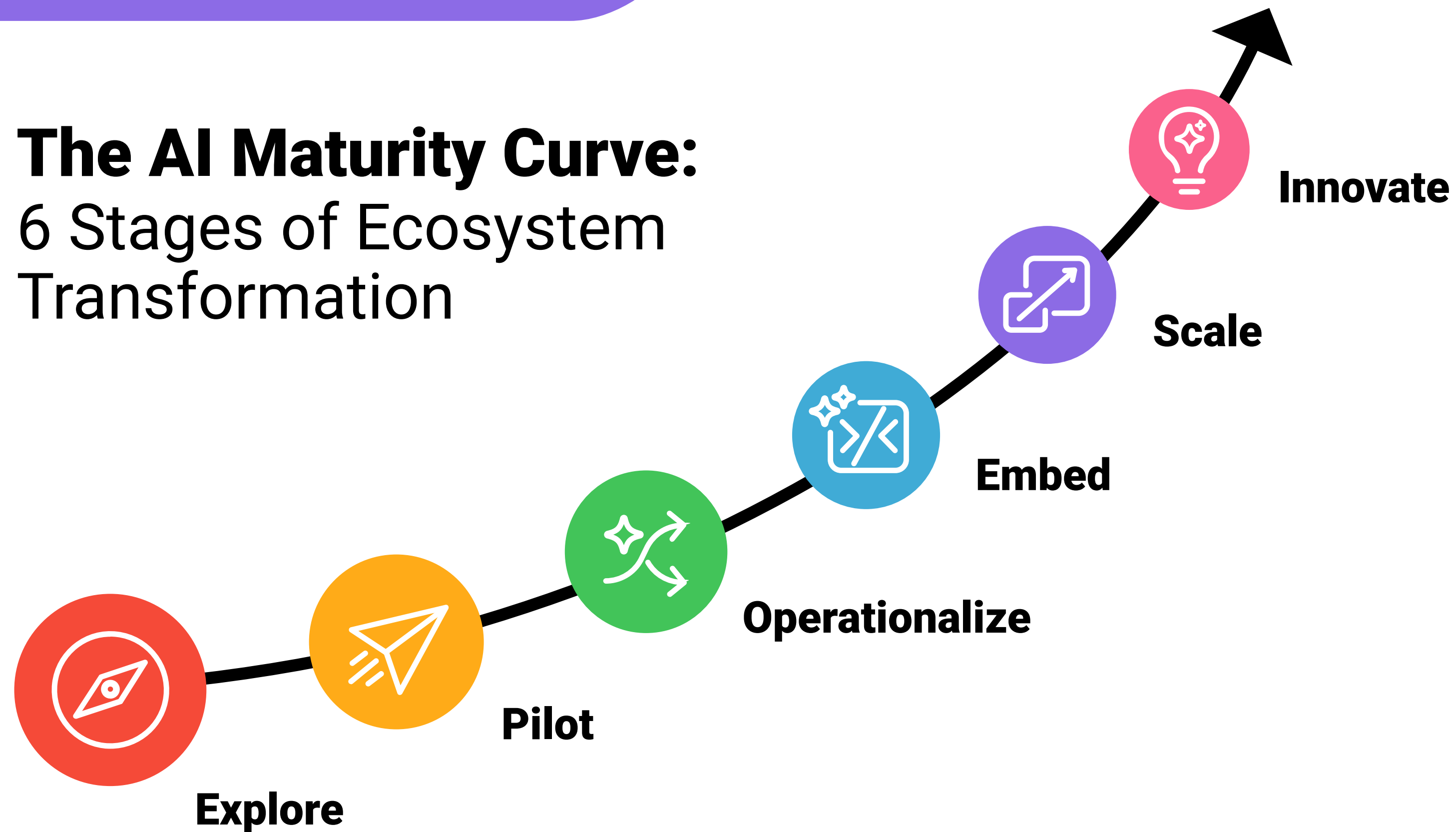
Operationalize

Embed

Scale

Innovate

The AI Maturity Curve: 6 Stages of Ecosystem Transformation

Explore

Researching AI tools, identifying opportunities, and mapping initial use cases.

What This Looks Like

Exploring AI technology, evaluating vendors, and documenting potential partner-related workflows.

Next Step

Conduct an AI opportunity audit across partner operations.

"First you have to understand your audience, what are they looking for, how do they anticipate to be interacted with, and how far can you go with AI before needing human intervention."

Heather Harlos
Vice President of Channel Programs
Coro

CORO

Pilot

Testing isolated AI use cases with low complexity and measurable outputs.

What This Looks Like

Running small GPT-based experiments, piloting automated QBR summaries, or testing AI tools for partner search.

Next Step

Select one low-risk, high-friction workflow to automate with AI operations.

"The next step is often Agentic AI—deploying agents to handle repetitive tasks, data lookups, or interactions with knowledge bases. These use cases deliver quick wins and build confidence in AI's potential."

Raegan Wilson
VP of Ecosystems
Spur Reply

REPLY
SPUR

Operationalize

Connecting AI into core systems to improve workflows and insights.

What This Looks Like

Using AI for lead scoring, generating partner enablement content, or surfacing insights from unstructured data.

Next Step

Invest in secure integrations and begin standardizing successful pilot workflows.

"Balancing AI automation with human oversight in partner strategy and decision-making is crucial for ensuring that the right approach is applied to ensure the most efficient and accurate business outcome is applied."

Brian Galicia
Sr. Director
Global ISVs
Microsoft

Microsoft

The AI Maturity Curve: 6 Stages of Ecosystem Transformation

Embed

Making AI part of daily partner workflows and decision-making.

What This Looks Like

Empowering partner managers with AI copilots, automating follow-ups, and generating content on demand in partner portals.

Next Step

Build formal governance, training, and prompt libraries for AI usage.

"Partner profiling. Uploading all the information you have about your partners into an AI engine and using it to identify the top partners that do X or the top partners that sell Y. Some of that can be done in reporting, but AI can handle so many more variables and provide more insights—easily."

Edward Cepulis
Sr. Director
Channel Programs
& Enablement
Gitlab

Scale

Expanding AI usage across functions and partner lifecycle stages.

What This Looks Like

Enabling cross-functional access to AI tools, regulating prompts and playbooks, and scaling partner intelligence across regions.

Next Step

Establish orchestration across partner marketing, sales, and ops.

"The biggest shift we see is from AI experimentation to orchestration—where tools, data, and workflows are connected to drive consistent, scalable impact across the partner lifecycle."

Kyrsa Dixon
Senior Director
Bridge Partners

Innovate

Using AI to shape partner strategy with predictive and adaptive systems.

What This Looks Like

Forecasting partner performance, dynamically adjusting incentives, and experimenting with AI-led partner experiences.

Next Step

Create an AI Center of Excellence and invest in strategic experimentation.

"Within a few years (or less) the only defensibility left in software will be proprietary data moats... your company will only be as strong as the proprietary data you can access—and your ecosystem is a wellspring of such data via account mapping with partners."

Bob Moore
CEO
Crossbeam

Scaling AI Responsibly:
Mitigating the Risks of Rapid Adoption

The rush to scale AI can introduce serious risks when organizations skip foundational steps. While AI offers tremendous potential, poorly planned adoption can lead to costly missteps, reputational damage, and internal disruption. Realizing AI's long-term value often depends on thoughtful planning and measured implementation.

Here are five key risks to watch for: ⟶

1 Lack of Strategic Focus

Many teams jump into AI without aligning efforts to specific goals, partner needs, or market context. This often results in fragmented initiatives with unclear ROI. As **Jay McBain, Chief Analyst at Canalys**, advises:

"Determine AI strategy. Channel partners should begin by defining a clear AI strategy that aligns with the organization's goals, strengths and target markets. Partners should conduct a thorough analysis of the AI opportunity and perform a total addressable market (TAM), serviceable addressable market (SAM) and serviceable obtainable market (SOM) analysis to identify the scope of their opportunity.

Partners should then focus on identifying their value proposition and competitive differentiation, carefully identifying their strengths, weaknesses, opportunities and threats, as well as opportunity costs given limited resources and capital.

After completing the necessary analysis, partners should finalize their strategy for integrating Gen AI internally and monetizing, packaging, and delivering Gen AI services to clients.

By developing a well-defined Gen AI strategy, channel partners lay the groundwork to execute focused, competitive and profitable services."

2 Poor Foundation & Readiness

Successful AI implementation depends on clean data, documented workflows, and internal fluency. Skipping these fundamentals can lead to failure, even with powerful tools. AI needs structured environments to thrive, not ad hoc experimentation.

Curtis Brinkerhoff, CRO of Impartner underscores the importance of data control as a critical starting point:

"Considering that AI can only take action on what it knows and is trained with, people need to understand the current state of data and what they want and do not want exposed in general. From there it is imperative to build a model with security constraints that you can trust not to use or expose that data."

By developing a well-defined Gen AI strategy, channel partners lay the groundwork to execute focused, competitive and profitable services."

Without this level of clarity and governance, organizations risk exposing sensitive information, undermining trust, and compromising the reliability of AI-driven outcomes.

3 Overreliance on Hype

The excitement around AI can mask its current limitations. Tools must be trained, validated, and monitored, especially in customer- or partner-facing scenarios. Blind faith in automation without oversight invites errors.

4 Lack of Differentiation

Organizations that apply generic AI solutions may struggle to create real value. Without identifying and leveraging unique strengths, efforts can blend into the noise. AI should amplify what makes your offering distinct, not duplicate what's already out there.

5 Failing at Scale

AI mistakes don't stay small, they scale instantly. As **Brad Pace, COO of Impartner,** explains:

"The excitement around AI is undeniable, but there's a flipside: the risk of failing at scale. When a bot provides the wrong information, it can impact many customers instantly. That's why taking a services led approach to AI is critical. It helps ensure that any mistakes aren't fatal to your business."

A services-led approach adds a human checkpoint to reduce risk and adapt quickly when AI goes off course.

What's Next in Partner AI?

PRM Copilots:
LLMs that summarize partner status, flag actions, surface risks

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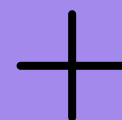
Behavior Modeling:
AI tracks partner activity across tools to forecast engagement

+
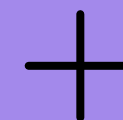
Dynamic Tiering:
Incentives based on performance signals, not static levels

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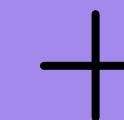
End-to-End Orchestration:
From onboarding to QBR prep, all AI-assisted

Neeti Gupta
PhD candidate
Founder & CEO
AI Partnerships

Neeti Gupta, Founder & CEO of AI Partnerships and PhD candidate at the University of Cambridge shares emerging shifts and best practices shaping the future of AI in partner ecosystems: ⟶

Shift 1 – From credits to co-ownership:

Hyperscaler Agent AI startup partnerships are moving beyond credits and co-sell listings. There's growing pressure to demonstrate mutual monetization—shared revenue, data, or product IP. Startups that can show alignment on go-to-market motion, not just tech fit, will win.

Shift 2 – AI agents require different partnerships:

The rise of autonomous or semi-autonomous agents is pulling in new actors—like API marketplaces, data, database and content providers, and infra/hardware players. This changes the focus on different kinds of ecosystem players.

Best Practice – Treat prompt context like an API contract:

Companies should start defining and versioning prompts, context windows, and RAG sources the way they treat APIs. Guardrails, logging, and auditability are not optional if partners are co-building with AI.

Key Risk – Misaligned governance across partners:

AI safety practices are still uneven across the stack. If one partner uses synthetic data without disclosure, and another logs prompts with PII, you've got shared liability but no shared accountability. Ecosystem-level governance will become a make-or-break factor.

Appendix: Additional Tools and AI Resources for Partnership Ecosystem

→ How AI is shaping the future of Partner Management

→ The Artificial Intelligence tag on Medium

→ The Superhuman Newsletter

→ The Everyday AI podcast

→ The AI Daily Brief podcast

→ Coursiv AI training courses

→ Using AI Right Now: A Quick Guide – by Ethan Mollick

→ Gartner AI Maturity Model and AI Roadmap Toolkit | Gartner

→ Jumpstart AI – TiER1 Performance

→ The top 30 AI leaders to follow in 2025

→ The Pavilion AI GTM course

→ Roger Martin's WWHTBT

→ OpenAI – Identifying and scaling AI use cases

→ Deloitte aiRMF

→ Forrester State of AI Agents 2024 maturity staircase

→ McKinsey "Generative AI in B2B Sales"

→ Gartner "Critical Capabilities for Data Integration Tools 2024"

→ Data-Mania "AI-Powered Strategies for Partner Ecosystem Growth"

→ Microsoft Copilot Overview (Dynamics 365 Sales)

→ Competing in the Age of AI by Marco Iansiti & Karim Lakhani

→ Salesforce Einstein Use-Case Guide

→ Making Channel Sales Work by Marcus Cauchi & David Davies

→ Artificial Intelligence (AI): Online Courses, Training and Tutorials | LinkedIn Learning

→ Artificial Intelligence Courses | Harvard University

→ Explore the world of AI with online courses from MIT | Open Learning

→ AI Learning Hub | Microsoft Learn

→ Google AI – Understanding AI: AI tools, training, and skills

→ AI Courses and Training – Learn Artificial Intelligence – AWS

→ The AI-Driven Leader by Jeff Woods

→ The Singularity Is Nearer by Ray Kurzwell

→ Marketing AI Institute

→ Canalys 5-year AI Channel Forecast

→ How to Make AI Sound Like You by Ruben Hassid

→ Channel Marketing Association's Your First 30 Days with AI

→ Strategic Partnerships in the AI Ecosystem by Partnership Leaders

Contributors

Bob Moore
Co-Founder and CEO
Crossbeam

Bob Moore is Co-Founder and CEO of Crossbeam, an Ecosystem-Led Growth (ELG) platform that helps companies use their partner ecosystems to generate leads, close deals, and grow faster. Moore previously co-founded Stitch (Acquired by Talend in 2018) and RJMetrics (acquired by Adobe by way of Magento Commerce in 2016). He is the National Bestselling author of Ecosystem-Led Growth.

Bob serves as a Trustee of The Franklin Institute, and has previously served as the Board Chair of Philly Startup Leaders and Board Member of Philadelphia Alliance for Capital and Technologies (PACT).

Outside of work, Bob is an improv comedy performer, where he has performed over 100 shows as a member of the Philadelphia-based improv team Big Baby.

CROSSBEAM

Brad Pace
Chief Operating Officer
Impartner

Brad Pace joined Impartner in 2016, and as Chief Operating Officer, is accountable for ensuring that Impartner customers benefit from Impartner's channel management solutions, sales operations and acquisition integration.

Before joining Impartner, Pace held a number of executive sales, customer service and analytics roles at EMC, most recently servicing as senior director of customer service support analytics and global director of customer service for EMC's multi-billion-dollar backup and recovery division. Pace has also held leadership positions in the management consulting industry for A.T. Kearney.

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Contributors

Brian Galicia
Senior Director
Global ISVs
Microsoft

Brian Galicia's partner team empowers partners & ISVs to grow their revenue with the Microsoft Cloud. He has been with Microsoft for 19+ years across various leadership roles including Sales and Marketing and has won numerous awards including the prestigious Microsoft Circle of Excellence/ Platinum Club. He is a LinkedIn Top Voice, keynote speaker and co-author of **Navigating LinkedIn for Sales**.

Microsoft

Curtis Brinkerhoff
Chief Revenue Officer
Impartner

Curtis Brinkerhoff boasts a remarkable career spanning over two decades in the technology sector. His journey in the industry has seen him don pivotal roles such as Sales Director, VP, EVP, COO, and CRO, and led companies from $3M to over $100M in annual revenue. Throughout his tenure, he has not only spearheaded sales but has also led dynamic support, customer service, and marketing teams, showcasing his diverse business acumen and innovative problem-solving approach.

This experience, combined with his commitment to innovation and excellence, positions Curtis uniquely in serving Impartner's market needs with utmost professionalism. He emphasizes bringing best-in-class solutions to the heart of the partnerships industry.

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Contributors

Ed Cepulis
Sr. Director
Channel Programs & Enablement
GitLab

Ed Cepulis is the Sr. Director, Ecosystem Programs and Sales at GitLab, leading the development and scaling of the global GitLab Ecosystem Sales, Services and Enablement Programs. Throughout his career, he's helped drive business through partners in programs, solutions, strategic alliance and marketing leadership roles. Prior to joining GitLab in January 2020, Ed held channel leadership roles at Gigamon, LogRhythm and Cisco Systems. Ed is based in Boulder, CO USA and enjoys mountain biking, skiing and exploring new places with family and friends.

Heather Harlos
Vice President of Channel Programs
Coro

Heather has been helping companies optimize their business operations and go-to-market strategies for over 18 years. Before joining Coro as the Global VP of Programs, she served in multiple global roles for Fortune 500 companies, helping them create live experiences, leverage modern digital platforms, develop holistic programs, and empower their customers to thrive. In her free time, she trains hunter/jumper horses and actually could ride before she could walk.

Contributors

Jay McBain
Chief Analyst
Canalys

Jay McBain is a Chief Analyst at Canalys, leading channels research in North America, as well as being an integral part of the worldwide channels research and advisory team. Jay is one of the most visible and respected thought leaders in the global channel ecosystem. He is often sought out for industry guidance and future trends, helping vendors across the entire technology spectrum develop their partnering and ecosystem strategies. He regularly speaks at vendor channel events about major shifts in the channel ecosystem.

Prior to joining Canalys, Jay was a Principal Analyst at Forrester, covering channels and ecosystems. During his tenure at Forrester, Jay developed his reputation as an industry thought leader and was named 2021 Channel Influencer of the Year by Channel Partners Magazine. Jay has also held various executive channel sales, marketing and strategy roles with IBM, Lenovo and ChannelEyes over a 28-year career.

Juhi Saha
CEO
Partner1

Juhi is an award-winning business leader with a track record of founding multi-million dollar partner businesses and leading transformative projects. She is CEO of Partner1, the trusted partner ecosystem advisor for B2B SaaS and Services companies, and one of only five partner-led networks globally, recognized by Microsoft for their impact in helping Microsoft partners scale successfully. As Global Director at Microsoft, she launched Pegasus, Microsoft's flagship program for scaling VC-backed startups, and developed key fintech partnerships. As VP of Partnerships at Clearbit, she generated significant revenue and was instrumental in its acquisition by HubSpot. Juhi also brought her expertise to executive roles at Intel and Qualcomm, covering operations and product development. She currently advises and sits on the boards of fast-growing companies. She has an M.B.A. and B.S. in Electrical Engineering and Computer Science from the University of California at Berkeley, and an M.S. in Electrical and Computer Engineering from the University of California at San Diego.

Contributors

Komal Shah
Head of Global Channel Operations
Atlassian

Komal Shah leads Global Channel Operations at Atlassian, where she spearheads initiatives to streamline processes, elevate partner tools, and enhance the overall partner experience. With over 25 years of experience spanning the entire channel go-to-market cycle—from manufacturers to resellers and platform partners across hardware and SaaS—she brings a unique depth of insight to her role. A strong advocate for operational excellence, Komal is known for building scalable systems that simplify complexity and allow partners to focus on growth.

As a strategic player-coach, Komal is an expert in partner program design, CRM/PRM implementation, process optimization, and data-driven decision-making. She has transformed traditional program components—like Deal Registration, MDF, and portal tools—into engines for partner engagement and revenue acceleration. Komal's ability to influence C-level stakeholders, lead cross-functional teams, and integrate complex systems positions her as a key driver of business transformation.

Her holistic, analytical approach makes her a trusted leader in navigating the evolving channel landscape.

Kyrsa Dixon
Senior Director
Bridge Partners

Kyrsa Dixon is a senior leader with over two decades of experience in the technology sector, leading partner and product go-to-market strategies across global enterprises and high-growth organizations. She specializes in building scalable programs and connected experiences that accelerate adoption of innovative products within complex ecosystems.

Contributors
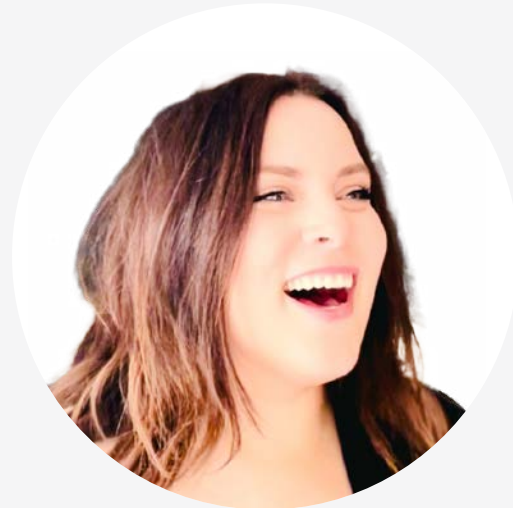
Lauren Helstab
Founder at More Than One Way
co-creator of Partnerships in Play

Lauren Helstab and Michelle Teo partner to help B2B SaaS companies build scalable partner programs through strategy, enablement, and partner marketing that drive activation and revenue. Together, they also co-create Partnerships in Play — a content hub with actionable strategies, real-world examples, and lessons from the field to turn partnerships into revenue. Lauren Helstab, founder of More Than One Way, brings almost 10 years of partnerships experience, including nearly 6 years scaling Shopify's programs across the US and UK. Her consultancy focuses on crafting partnership strategies and enabling SaaS teams to drive partner-sourced revenue.
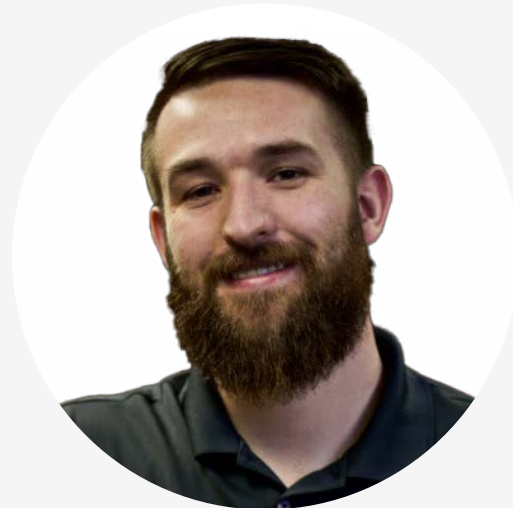
Michelle Teo
Founding Partner at Demand Conversion
co-creator of Partnerships in Play

Michelle Teo, founding Partner at Demand Conversion, has helped 25+ growth-stage SaaS companies drive revenue through data-driven ICP research, enablement content, and co-marketing campaigns while training teams to scale independently.

Contributors

Levi Lauck
Senior Product Manager
Impartner

Levi Lauck is a senior product leader at Impartner with over 15 years of experience, evolving from web designer to driving innovations like the Extensibility Platform and Orchestration Studio, used by Fortune 500 partner programs. Known for bridging the gap between engineers and executives, he combines deep technical fluency in JavaScript and C# with a strong focus on business outcomes.

An early AI adopter, Levi builds intelligent prototypes using OpenAI, LangChain, and vector databases. His recent GenAI widget reduced partner friction by 40% and led to a new product line. Focused on outcomes, Levi measures success by customer ROI rather than feature counts, whether it's increasing attach rates or reducing integration time from weeks to hours.

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Matt Karst
VP New Vendor Acquistion – North America
TD SYNNEX

Matt Karst is a technology industry veteran for over 35+ years whose career includes working in many aspects of the supply chain including vendor, VAR, ISV, wireless carrier, satellite broadcast carrier, emerging tech cloud start up, and distributor. Matt currently serves as TD SYNNEX's Vice President – New Vendor Acquisition in North America. His team is responsible for engaging with new vendors to the TD SYNNEX ecosystem and developing a winning GTM strategy for growth. Prior to the TD SYNNEX acquisition of Westcon in Sept 2017, Matt was the Senior Director – Cloud for Westcon Comstor in North America. Prior to TD SYNNEX, Matt was DISH Network's VP of Alliance Management and National Accounts.

Before joining DISH Network, Matt served as VP of Sales for Centennial Wireless (acquired by AT&T) and has led successful sales organizations in the wireless telecom industry and the hardware/software industry, including a start-up internet company funded by ICG (Internet Capital Group). Matt started his career with numerous sales and management positions with IBM in the Southeast Region. Matt graduated Magna Cum Laude from the University of Miami (FL).

TD SYNNEX

Contributors

Michelle Morgan
Director of Partnerships
Tier1 Performance

Michelle Morgan is the Director of Partnerships at TiER1 Performance. TiER1 Performance focuses on helping companies fuel transformation by supporting strategy definition, organizational alignment, people engagement and plan implementation. When it comes to the tech stack, Michelle and the team at TiER1 support their customers in identifying the most effective and efficient ways to leverage infrastructure – people, processes, technology, and data – to drive strategy, allowing teams to focus on the inherently human aspects of their work. With 15 years of experience in partnerships, including her time at National Instruments as an Impartner customer, Michelle is passionate about fostering relationships built on mutual success.

Beyond her work in partnerships, Michelle is a dedicated health and fitness enthusiast and a Certified Personal Trainer. She embraces Colorado's outdoor lifestyle, enjoying adventures alongside her husband and three young boys.

Neeti Gupta
PhD candidate
Founder & CEO
AI Partnerships

I'm currently pursuing a PhD at the University of Cambridge, where my research focuses on AI partnerships, ecosystem strategy, and platform dynamics. As the Founder and CEO of AI Partnerships, I bring over two decades of experience in business development, strategic alliances, and go-to-market leadership across top technology companies. My work combines design thinking, data analytics, and user-centered strategy to build scalable, high-impact AI partnership initiatives. I've led critical negotiations including VMware's security co-pilot agreement with Microsoft and their Azure Marketplace rollout across US and global markets. I'm driven by a deep interest in how AI reshapes organizational decision-making, value creation, and industry ecosystems, and I use my academic and industry experience to bridge theory with practice at the frontier of AI transformation.

Contributors

Patrick Ferdig
Founder and Principal Consultant
The Power of Partnering

Patrick is an experienced partner leader with more than 20 years in the technology industry. He has helped many businesses to improve their partner operations, accelerate their growth, and boost their revenue. Patrick's areas of expertise are in enterprise content and commerce platforms, including composable and MACH solutions.

Patrick is passionate about developing and managing effective partnerships. He has created several partner programs, including reseller channels, integration marketplaces, and referral networks. He is an expert in partner relationship management, partner lead management, and partner co-marketing execution.

THE POWER OF PARTNERING

Raegan Wilson
VP of Ecosystem Consulting
Spur Reply

Raegan Wilson is Spur Reply's VP of Ecosystem Solutions & Innovation, where she leads platform alliance relationships and drives strategy for ecosystem automation and optimization. With decades of channel experience, she transforms partner engagements into competitive advantages for clients through modernized programs and optimized partner tech stacks. A passionate advocate for AI and automation, Raegan integrates advanced technologies to elevate channel strategies and foster scalable, data-driven partnerships.

Outside the boardroom, Raegan is a certified Pilates and Barre instructor, teaching multiple classes each week. Her commitment to wellness and movement reflects her belief in balance and discipline—values she brings to both her professional and personal life. She's also a proud Grandma, a role that brings joy and perspective to her dynamic career.

REPLY SPUR

IMPARTNER

Every day, the world's leading partner ecosystems trust **Impartner** to help them work smarter, move faster, and scale with confidence. At the center of that execution is Impartner's **Orchestration Studio**, a powerful workflow engine designed to connect systems, automate key motions, and embed AI directly into your partner programs.

Artificial Intelligence offers immense potential, but true impact comes only through precise and purposeful execution. The AI Partner Playbook is more than a collection of ideas; it is a launchpad for turning vision into velocity, powered by real-world insights from ecosystem experts already putting AI into action.

As AI reshapes what is possible throughout the partner journey, success belongs to those who turn possibility into process and process into outcomes.

You have the roadmap. Now let's build what's next together.