Fictional example · AI draft

Plan for the first joint sales opportunity

Your input

Which partner do you want to sell with?	Example Accountants
What does the partner offer its customers?	Bookkeeping and annual accounts for small construction firms.
What do you offer?	Software for time tracking and project costing.
For which type of customer do you complement each other?	Contractors with five to thirty staff who work out project costs afterwards.
What has already been agreed?	We refer customers to each other. Nothing has been agreed about a fee yet.

Partnership proposal

> Joint value for the customer
>
> The contractor sees what each project cost, and the accountant no longer has to retype the hours.

First opportunity

The accountant's customers who currently work out project costs in spreadsheets. The accountant knows which customers they are.

Who does what

The accountant mentions the option at the annual review. You give the demo and set up the integration.

Still to agree

Whether there will be a referral fee, and who helps the customer if the integration doesn't work.

First step

Choose three of the accountant's customers together and plan a joint meeting with each.

Check first

It isn't confirmed that you can integrate with the partner's accounting software. Check this before you mention it to customers.

This is an AI draft based on your input. AI hasn't looked anything up or checked anything. Review it before you use it.