

# Co-Marketing Agreement: Sally's Accounting and NiftyCRM

<b>Strategic Goals</b>	Generating new leads and increase integration adoption
<b>Activities</b>	Listing integration in both marketplaces, hold webinars for current joint customers of Sally's and NiftyCRM, hold webinars for Sally's customers who are identified as prospects for NiftyCRM and vice versa, webinars distributed on social and blogs and customers invited via email
<b>Desired Results</b>	50 new SQLs for Sally's and NiftyCRM; 35% of joint customers using integration actively every month
<b>Timeline</b>	Webinars to be planned in 1 month; launched in 3 months, and recorded for on-demand viewing; marketplace pages up in 2 months; results obtained in 5 months
<b>Data Sharing</b>	Sharing prospect and customer account names, companies and emails for the purpose of sharing webinars via Crossbeam for the duration of the agreement (5 months)

## Budget

1k per partner for video production and 2k per partner for promoting the webinars on LinkedIn to target accounts.

## Contacts for Each Team

NiftyCRM: Bridget Jones, [bridget@niftycrm.com](mailto:bridget@niftycrm.com), Tech Partner Manager;  
Lizzy Bryan, Partner Marketer, [lizzy@niftycrm.com](mailto:lizzy@niftycrm.com)

Sally's Accounting: Bryan Smith, [bryan@sallys.com](mailto:bryan@sallys.com), Tech Partner Manager;  
Phillip Grasio, [phillip@sallys.com](mailto:phillip@sallys.com), Senior Product Marketer

Each team agrees to communicate via email and a shared Slack channel in the hours between 8am and 6pm; account lists shared through Crossbeam

## Tracking

Webinar - Collect and share names and emails of prospects who attend and engage in the webinar

Integrations - Track and share marketplace analytics like clicks, installs, hovers, and page visits

Conversions - Share webinar and marketplace leads who convert to customers

## Notable Restrictions

Logo and brand name can only be used by the partner for the integration marketplace, webinars, and distribution of webinars and any other usage requires permission. Both companies hold the copyright to the webinars. [Link to legal agreement.](#)

# Co-Marketing Plan Template

<b>Strategic Goals</b>	
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