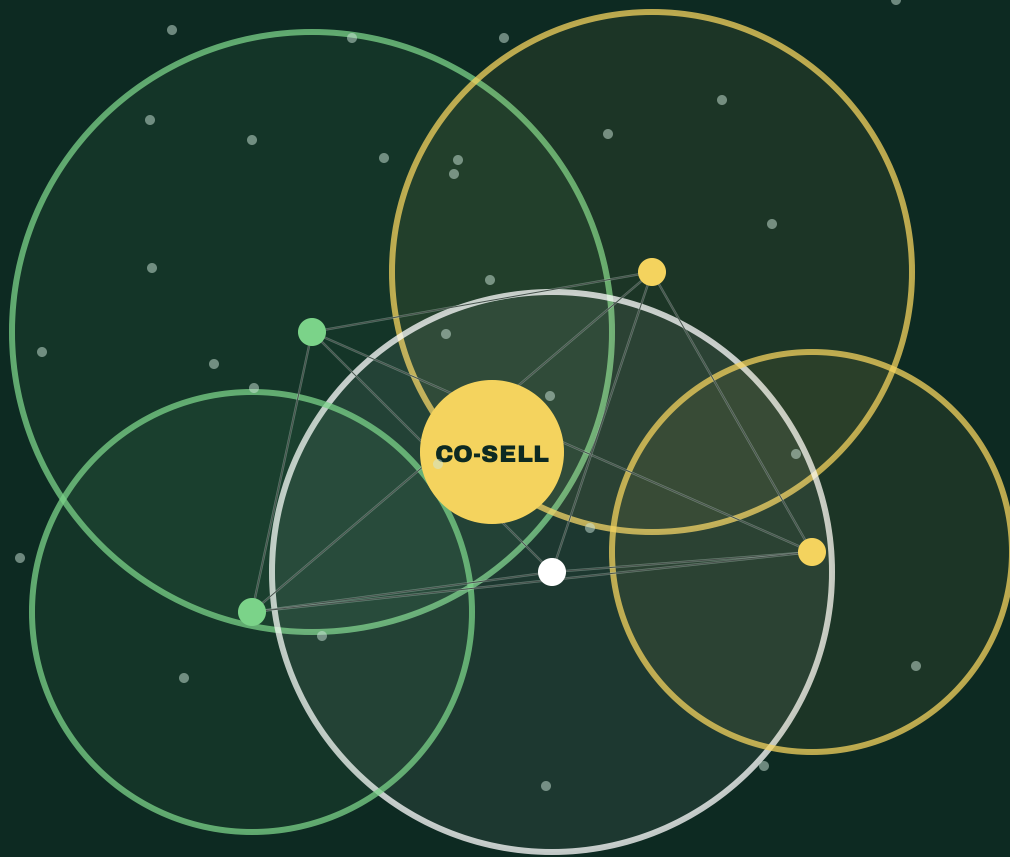




— INSTALLED BASE INTELLIGENCE SERIES

Ecosystem- Led Growth

How partnerships, alliances, and marketplace teams turn installed base intelligence into co-sell pipeline

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ABOUT THIS REPORT

This report consolidates published findings from Canalys and Omdia, Salesforce, Crossbeam, G2, and the State of SaaS Integrations study, current as of October 2026. Every figure links to its original source.

EXECUTIVE SUMMARY

The short version

Most technology is now bought with, through, or alongside partners, and the platforms at the center of each ecosystem increasingly decide who gets in the deal.

Partners touch the majority of global IT spending, nearly every sales team now sells with them, and cloud marketplaces are turning hyperscaler commitments into a primary route to market. Deals that involve partners close more often and faster. Yet most partner teams still plan co-sell around the narrow overlap between two CRMs, missing the much larger set of accounts that run a partner's platform and that neither side has engaged.

70%

of customer IT spending went through partners in 2025, per Canalys

89%

of sales teams use partner sales, per Salesforce

83%

of sales pros say partner selling matters more to revenue than a year ago

53%

more likely to close when a partner is involved, per Crossbeam network data

\$85B

in software sales expected through hyperscaler marketplaces by 2028

59%

of hyperscaler marketplace spend expected to flow through partners by 2030

Installed base data closes that gap. It shows every account running a partner's platform, how many fit your ICP, and who owns each system, which turns partner prioritization, co-sell, and marketplace targeting from guesswork into a plan.

CHAPTER 01

The ecosystem now carries the deal

01

Partners don't sit at the edge of technology buying anymore; they sit in the middle of it. Canalys found that [70% of customer spending on technology, IT services, and telecom went through partners in 2025](#), and Omdia expects [67% of a \\$6.07 trillion technology market to flow through partners in 2026](#). The share has drifted down slightly as marketplaces and direct digital buying grow, but partners still touch the clear majority of every technology dollar.

SHARE OF CUSTOMER IT SPENDING THROUGH PARTNERS



Source: [Canalys IT spending forecast](#)

89%

of sales teams [currently use partner sales](#), according to Salesforce's State of Sales

83%

of sales professionals say [partner selling has a bigger impact on revenue](#) than a year ago

For a technology vendor, the question is no longer whether to work with partners. It is which partners, in which accounts, and with what evidence that the overlap is worth the investment.

CHAPTER 02

Partner involvement changes outcomes

02

Partners don't just add reach; they change how deals perform. Data from the Crossbeam network shows that [deals worked with partners see a 53% higher close rate](#), and that [sales cycles run 46% faster](#). Crossbeam's analysis of its network also found that [involving partners lifts win rates on average for every connected ecosystem size](#), regardless of ecosystem size.

53%

[higher close rate](#) when a partner is involved

46%

[faster sales cycles](#) on partner-worked deals

92%

of SaaS companies see [lower churn](#) among customers using partner integrations

Crossbeam figures are vendor-reported from its own network; [independent analysts](#) note the methodology is not published in detail.

Warm introductions

A partner that already works with an account can open a door a cold sequence can't.

Account intelligence

Partners know the stack, the politics, and the timing inside shared accounts.

Stickier customers

Products woven into a partner's platform are harder to rip out later.

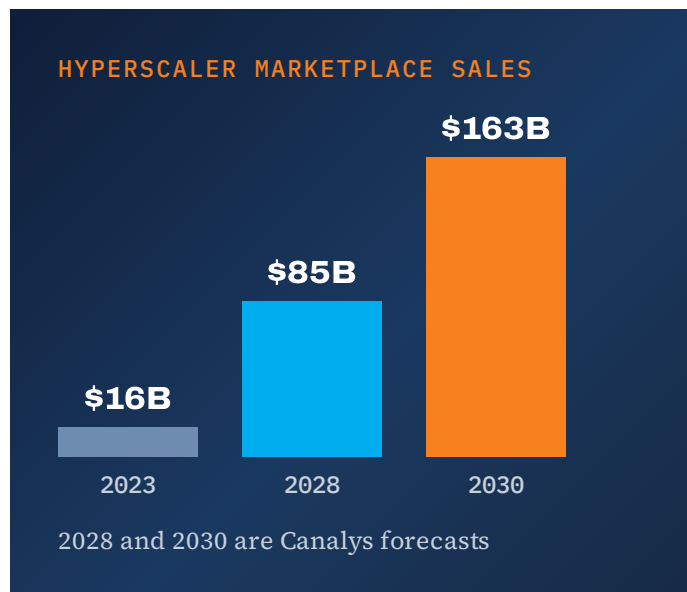
The catch is that these benefits only apply to accounts where a partner is actually present. The more precisely you can find those accounts, the more of your pipeline can carry the partner advantage.

CHAPTER 03

Marketplaces and cloud commitments

03

Cloud marketplaces have become one of the fastest-growing routes to market in software. Canalys projects [US\\$85 billion in sales through hyperscaler marketplaces by 2028](#), up from US\$16 billion in 2023, and its updated forecast puts [total marketplace spend at US\\$163 billion by 2030](#), with [59% flowing through channel partners](#).



\$360B+

in multi-year [commitments to the top three clouds](#) by enterprise customers

~\$30B

of [new commitments added in Q2 2025 alone](#), per Canalys

Those commitments are the engine. Customers [increasingly burn down cloud commitments by buying third-party software through marketplaces](#), and private offer models from all three hyperscalers let partners build customized deals on a vendor's behalf. G2 also found that [33% of C-suite buyers prefer to purchase software through third parties](#).

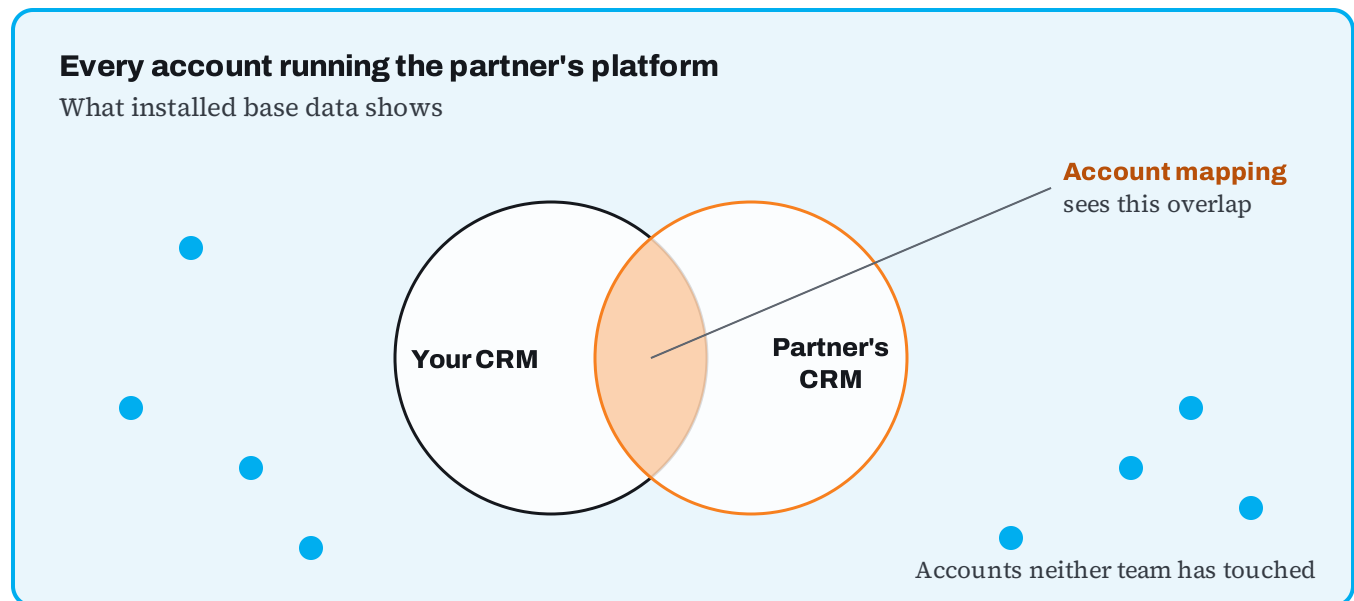
“Marketplace buying is organized around platforms. The accounts that run a hyperscaler's cloud are the accounts that can buy you with committed spend.

CHAPTER 04

The account mapping blind spot

04

Account mapping tools changed partnerships by letting two companies securely compare their CRM records. But by design, they [compare CRM-derived account lists to find overlaps](#). That reveals mutual customers and shared prospects, and it misses everything else.



What mapping shows

Accounts already in your CRM, the partner's CRM, or both.

What it misses

Accounts on the partner's platform that neither company has engaged.

Why it matters

For many partnerships, the untouched accounts are the larger share of the opportunity.

Installed base data fills the rest of the picture. It identifies every organization running the partner's platform, regardless of whether either CRM knows them, so co-sell planning can cover the whole addressable overlap instead of just the part both teams already see.

CHAPTER 05

Four ways partner teams use installed base data

05

Installed base data gives partner teams something they rarely have: an objective, account-level view of each partner's market.

01 Partner selection and tiering

Rank prospective and existing partners by how many accounts on their platform fit your ICP, before investing in enablement.

02 Co-sell market sizing

Quantify the total co-sell opportunity with each partner, including accounts neither CRM contains, to justify headcount and incentives.

03 Joint target account lists

Build shared lists of ICP accounts running the partner's platform, with verified owners for both sales teams to work.

04 Marketplace and cloud-aligned targeting

Find accounts running a specific hyperscaler, then pair outreach with marketplace listings and private offers.

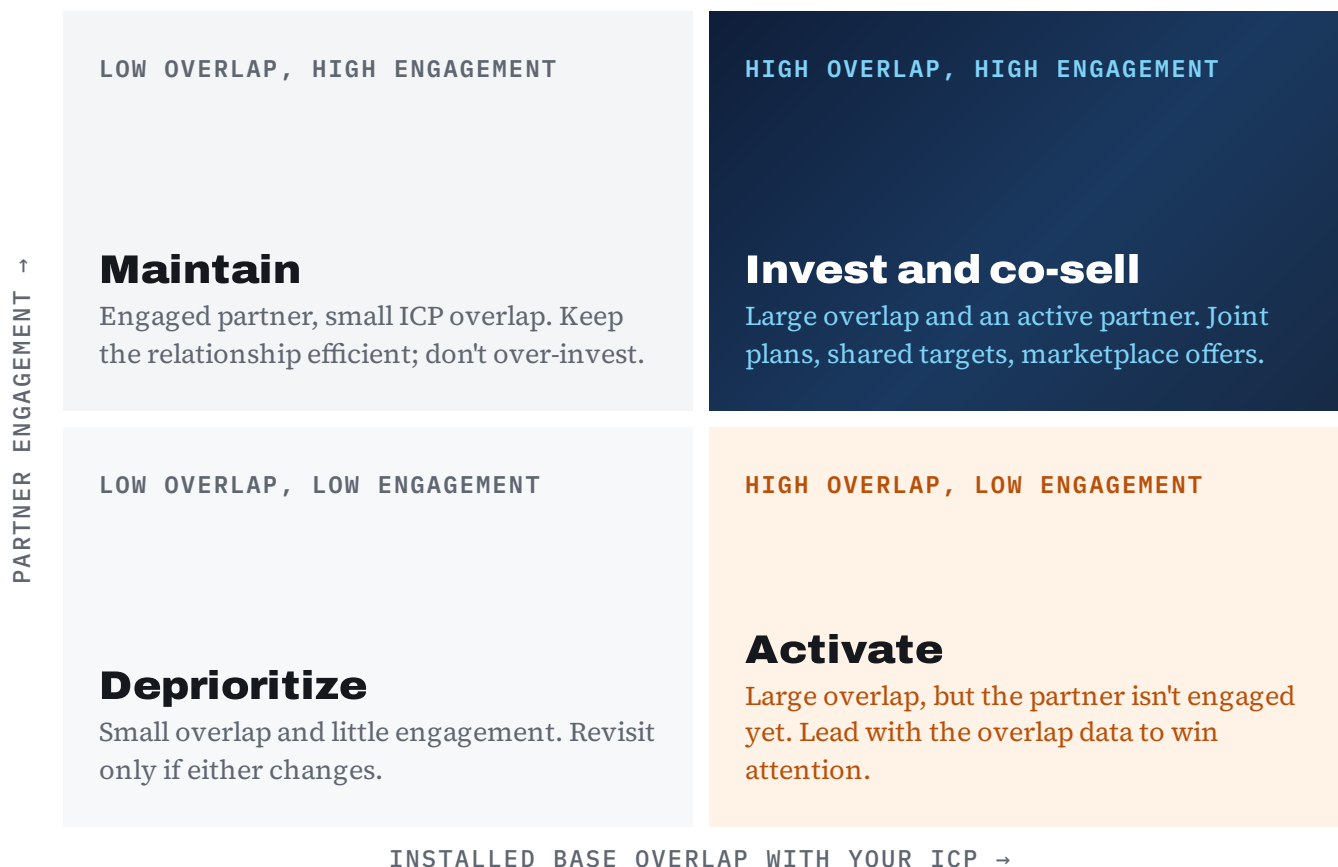
“ The partner conversation changes when you can say exactly how many of their customers fit your ICP, and name them.

CHAPTER 06

Prioritizing partners by installed base overlap

06

Most partner programs tier partners by enthusiasm, logo size, or who asked first. A stronger approach scores each partner on two axes: how much of their installed base fits your ICP, and how engaged they are in working with you.



The "Activate" quadrant is where overlap data pays off fastest. A partner that hasn't prioritized you will often change its mind when shown a named list of its own customers that fit your ICP.

CHAPTER 07

The co-sell playbook

07

Co-selling works when both teams agree on which accounts matter and why. This six-step sequence starts from the full installed base overlap and turns it into shared pipeline.

1 Size the overlap

Count every account on the partner's platform that fits your ICP, not just the ones in either CRM.

2 Split it three ways

Mutual customers, shared prospects, and untouched accounts each need a different motion.

3 Agree on joint targets

Build a shared list with verified owners, and name who leads each account.

4 Equip both sales teams

Give partner reps the integration story and your reps the partner's value in that account.

5 Run warm introductions

Use partner relationships in mutual customers; run joint campaigns into untouched accounts.

6 Review the overlap quarterly

Refresh the installed base, retire closed accounts, and add new platform users.

THREE SEGMENTS, THREE MOTIONS

Mutual customers

Expansion and cross-sell, led by whoever owns the relationship.

Shared prospects

Coordinated pursuit, with a warm introduction from the stronger relationship.

Untouched accounts

Joint campaigns built from installed base data, where most of the upside sits.

CHAPTER 08

The marketplace playbook

08

Marketplace success depends on matching the right listing to the right cloud. Vendors that list everywhere but target nowhere tend to see little marketplace pipeline. [Private offer models across AWS, Microsoft, and Google Cloud](#) let partners create customized offers on a vendor's behalf, which makes partner targeting part of marketplace targeting.

1

Identify cloud-aligned accounts

Find ICP accounts running AWS, Microsoft Azure, or Google Cloud as their primary platform.

2

Match listings to the cloud

Prioritize marketplace listings on the clouds your target accounts actually run.

3

Lead with commit burn-down

Position purchase through the marketplace as a way to use existing cloud commitments.

4

Bring channel partners in

Use private offer models such as AWS Channel Partner Private Offers and Microsoft Multiparty Private Offers.

5

Co-sell with the hyperscaler

Register opportunities with the cloud provider's co-sell programs where you qualify.

6

Track marketplace-sourced pipeline

Measure pipeline, win rate, and deal size for marketplace versus direct deals.

THE DATA QUESTION

Which of our ICP accounts run AWS, Azure, or Google Cloud as their primary platform, and who owns that relationship?

CHAPTER 09

09

Joint marketing plays

Joint marketing works best when the audience is defined by the partnership itself: organizations running the partner's platform that also fit your ICP. These six plays all start from that list.

Joint webinars for platform users

Invite only accounts running the partner's platform, so every attendee is relevant to both companies.

Integration launch campaigns

Announce a new integration directly to the installed base of the platform it connects to.

Platform conference plays

Target meetings at the partner's user conference using a pre-built list of attending-profile accounts.

Co-branded content

Publish a guide or benchmark for the partner's users, gated and shared across both audiences.

Partner-sourced ABM

Run account-based ads and outreach to ICP accounts on the partner's platform, with the partner's endorsement.

Customer advisory groups

Bring mutual customers together to shape the joint roadmap and generate case studies.

“ A joint webinar promoted to the partner's whole database is a brand exercise. One promoted to ICP accounts on their platform is a pipeline program.

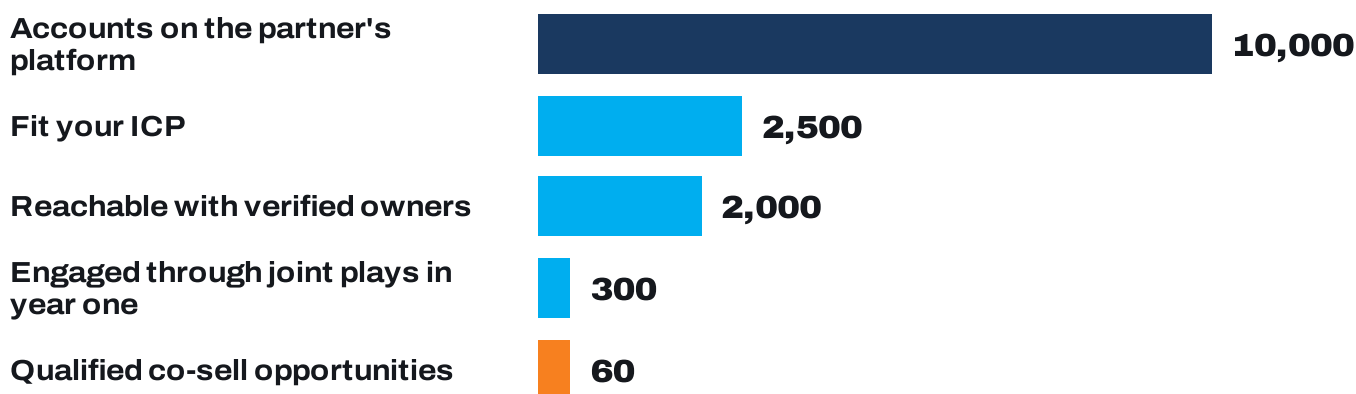
CHAPTER 10

Building the partner business case

10

A partnership earns investment when its pipeline potential is visible. Installed base data makes each step of the business case measurable, starting from the partner's real market rather than a guess.

ILLUSTRATIVE: FROM PARTNER INSTALLED BASE TO CO-SELL PIPELINE



Illustrative example only. Every number here is an assumption to replace with your own.

YOUR INPUTS

Partner installed base	[accounts]
ICP fit rate	[% fit]
Contact coverage	[% reachable]
Engagement rate	[% engaged]
Opportunity rate	[% to pipeline]
Average deal size	[your ACV]

THE FORMULA

Installed base × ICP fit × contact coverage × engagement rate × opportunity rate × deal size = co-sell pipeline

Only the first three inputs come from data. The rest you measure as the partnership runs.

CHAPTER 11

Metrics for ecosystem-led growth

11

Ecosystem programs are often judged on activity: partners recruited, certifications earned, events run. These six metrics judge them on the pipeline and revenue they actually move.

ICP overlap per partner

How many accounts on each partner's platform fit your ICP.

Partner-sourced pipeline

Opportunities originated by partner introductions or joint plays.

Partner-influenced win rate

Win rate on deals with partner involvement versus without.

Sales cycle with partners

Days to close on partner-worked deals versus direct.

Marketplace-transacted revenue

Bookings through hyperscaler marketplaces and private offers.

Coverage of untouched overlap

Share of untouched ICP accounts on the partner's platform engaged this year.

A QUARTERLY PARTNER REVIEW AGENDA

Refresh the overlap

Update installed base counts, retire closed accounts, add new platform users.

Review the numbers

Partner-sourced pipeline, win rate, and cycle time against direct deals.

Set next quarter's targets

Agree on joint accounts, owners, and the plays to run against them.

START HERE

Measure ICP overlap per partner first. It tells you where every other metric is worth chasing.

CHAPTER 12

How Data InfoMetrix builds partner audiences

12

Data InfoMetrix specializes exclusively in Installed Base Data and Installed Base Intelligence. For partner and marketplace teams, we research which organizations run each partner's platform, align them to your ICP, and deliver verified contacts across the roles that own the platform and the budget.

EXAMPLES OF PARTNER AND MARKETPLACE AUDIENCES

- Salesforce, HubSpot, and Microsoft Dynamics users

- ServiceNow and Workday users

- AWS, Azure, and Google Cloud primary users

- Snowflake and Databricks users

- SAP and Oracle ERP users

- Shopify and commerce platform users

- Any partner platform your ICP runs

Beyond the CRM

Every account on the platform, not just mapped ones

Overlap counts

ICP overlap by partner for program planning

Verified

Contacts checked before they reach either team

Get your partner overlap counts

Tell us which partners you work with and who you sell to. We'll show you how many accounts on each platform fit your ICP. One of our experts will respond within one business day.

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FAQ

Frequently asked questions

What is ecosystem-led growth?

A go-to-market approach that uses partners, integrations, and marketplaces to find, win, and grow customers, rather than relying only on direct sales and marketing.

Do partner-involved deals perform better?

Crossbeam network data reports a 53% higher close rate and 46% faster sales cycles on partner-worked deals. These are vendor-reported figures.

How does installed base data help partner teams?

It shows every organization running a partner's platform, how many fit your ICP, and who owns the system, for partner tiering, co-sell, and joint marketing.

How do I prioritize which partners to invest in?

Score each partner on installed base overlap with your ICP and on engagement. Invest where both are high; use overlap data to activate high-overlap, low-engagement partners.

How much technology spending goes through partners?

Canalys found 70% of customer IT spending went through partners in 2025, and Omdia expects about 67% of a \$6.07 trillion market in 2026.

What is the account mapping blind spot?

Account mapping compares two CRMs, so it only sees accounts one side already knows. It misses accounts on the partner's platform that neither company has engaged.

How big are cloud marketplaces becoming?

Canalys projects \$85 billion in hyperscaler marketplace sales by 2028, and an updated forecast of \$163 billion by 2030 with 59% through channel partners.

Can Data InfoMetrix build lists by partner platform?

Yes. We build custom audiences of organizations running a specific platform or platform combination, aligned to your ICP and verified before delivery.

REFERENCES

Sources

Every figure in this report links to the page it was taken from. Vendor-reported figures are labeled as such, and the business case in Chapter 10 is illustrative.

- 1 [Canalys: IT spending to expand 8% in 2025, partner-delivered IT to account for 70%](#)
- 2 [Business of Tech: Omdia partner survey and 2026 technology market](#)
- 3 [Salesforce: State of Sales statistics \(July 2024\)](#)
- 4 [Crossbeam: Partner impact on close rate and sales cycle](#)
- 5 [Crossbeam: Partner involvement increases win rate across ecosystem sizes](#)
- 6 [Airframe: Independent analysis of Crossbeam](#)
- 7 [Canalys: Hyperscaler cloud marketplace sales to hit US\\$85 billion by 2028](#)
- 8 [IT Channel Oxygen: Canalys 2030 marketplace forecast](#)
- 9 [Tele.net: Canalys on marketplaces and private offer models](#)
- 10 [Business Wire: G2 2024 buyer data on third-party purchasing](#)
- 11 [Partner Fleet, PartnerStack, Paragon: 2024 State of SaaS Integrations](#)

NEXT STEP

See every account your partners can help you win.

Tell us which partners and platforms matter to your growth.
We'll build a researched, verified installed base audience of
the accounts you can win together.

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