

LUNCHBOX

Onboarding

Step 1: Connect with us on Crossbeam: [Link](#)

Step 2: Connect your data with us.

Integrate with your CRM system or upload Google Sheets (or a CSV) to get your data flowing into Crossbeam.

Step 3: Create a population.

Segment your data into meaningful groups of people or companies.

Step 4: Share your data.

Share exactly what you want with who you want, and nothing more.

If you're tired of constantly swapping spreadsheets, overexposing account lists, and the overall inefficiency of account mapping, try a quick, easy, and free-to-use tool:

[Crossbeam](#).

What is Crossbeam?

- Crossbeam is a partner ecosystem platform that acts as a data escrow service for partnerships, only surfacing information you choose to share when your populations “overlap” with your partners.
- Crossbeam helps you compare target account lists to open up co-selling opportunities with your partners.

What you'll get:

Start account mapping in Crossbeam to uncover overlapping customers, opportunities, and prospects with partners. Identify a pool of new leads and relationships with your partners, and accelerate opportunities when your partner's prospects or opportunities overlap with your relationships.

Create a strategic roadmap for partner activities as your overlap volume increases. For example, if you have a high volume of mutual overlaps in the Customer lifecycle stage, this is a signal to explore building a mutual integration to create value for both parties. Data sharing is 100% permission-based. You decide when and how a relationship is introduced. No data is ever shared with partners without your prior approval.

	Partner's Customers	Partner's Opportunities	Partner's Prospects
Your Customers	Build a tech integration, case studies	Give partner warm introductions/ context	Collect referral revenue
Your Opportunities	Get warm introductions / context from partner	Solution selling, co-marketing	Co-selling, co-marketing
Your Prospects	Get warm introductions / context from partner	Co-selling, co-marketing	Co-selling, co-marketing

- **Step 1:** Partner with Lunchbox on Crossbeam.

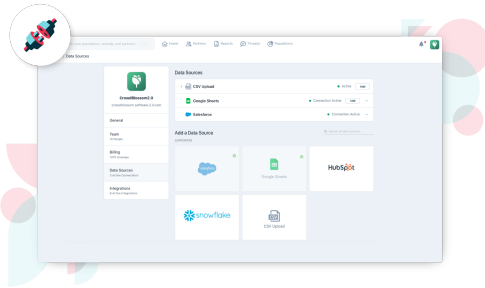
Click on the invite link to get started: <https://app.crossbeam.com/i/khfl9c>

The screenshot shows the Crossbeam registration interface. On the left, there's a form titled "Partner with CrowdBlossom on Crossbeam". The form includes a "Sign Up with Google" button, a "OR SIGN UP WITH EMAIL" section with fields for "Full Name", "Email Address", "Work Email Address", "Password", and "Confirm Password", and a "Get Started" button. Below the "Get Started" button is a link: "Have an account already? Log in instead". On the right, there's a graphic with four cards: "Identify" (Automatically find overlapping customers and prospects with CrowdBlossom, within minutes of signing up), "Validate" (Identify new opportunities to co-market, co-sell, and drive integration adoption or deal registration), "Execute" (Send your partner data back into tools your teams live in, like Salesforce & Slack), and "Grow" (Partner with thousands of other companies on the Crossbeam network). At the bottom right, there's a footer with "© Crossbeam 2018-2022", "Privacy Policy", and "Terms of Service".

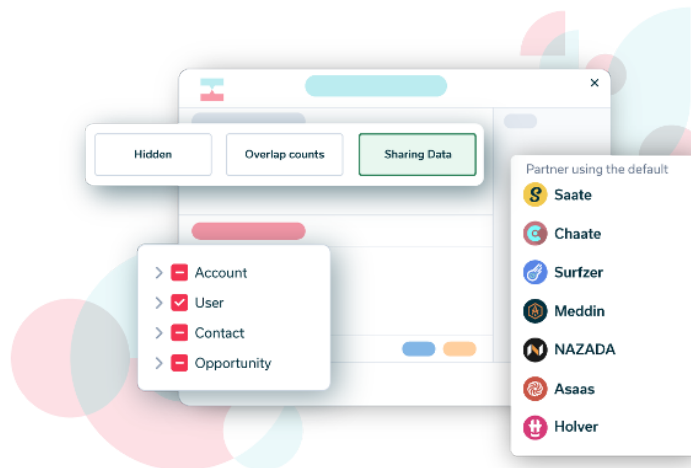
- **Step 2:** Add data.

Build a foundation for account mapping by syncing a data source. You can add a native CRM integration like Salesforce, HubSpot, or Snowflake data to jumpstart collaboration.

With your CRM connected, the data will sync in near real-time, and you won't have to worry about stale data when working accounts with partners. If you don't use these CRMs, you can upload your lists as CSV files or Google Sheets.



- Step 3:** Create a common language for comparing customer lists using [Populations](#).
 Organize your data into clearly-defined segments using Standard and Custom Populations in Crossbeam. The most common Populations map to your funnel stages: Prospects, Open Opportunities, and Customers.
- Step 4:** Set up sharing settings.
 You'll be prompted to set up default sharing rules on your populations. You always have the flexibility to change data sharing for each partner.



- Step 5:** View and analyze the data.
 Use Crossbeam to securely surface your chosen overlaps and the exact fields you want your partners to have access to. We recommend Account Name,

Account Website, and Account Executive information. Run reports to quickly access overlaps with the ability to filter for more granularity

768 Overlaps					Configure Columns	Export
	You	Michael Scott P...	Hammermill	You		
☐ Record	Account Status	Account Status	Account Executive	Account Executive		
☐ Cornell	Customer	Customer	Bill Watts	Andy Bernard		
☐ George Foreman	Customer	Customer	Casey Roth	Jim Halpert		
☐ McDonald's	Customer	Customer	--	Dwight Schrute		
☐ Rite Aid	Churn Risk	--	Alyssa Ventura	Dwight Schrute		
☐ Sbarro	Churn Risk	--	Elizabeth Lee	Jim Halpert		
☐ Staples	Customer	Customer	--	Jim Halpert		
☐ Wegmans	Churn Risk	--	Rose McCall	Stanley Hudson		
☐ Wendy's	Customer	Customer	Kieran Nathan	Jim Halpert		
☐ WUPHF	Churn Risk	--	Meghan Stein	Stanley Hudson		
☐ UTZ	Customer	Customer	--	Dwight Schrute		
Showing 1-20 of 768 results					< 1 2 3 4 5 ... 10 >	