

Ecosystem Compass

2025

The most comprehensive
analysis of global
technology ecosystems



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Co-Founder & COO

PARTNERSHIP LEADERS

Tai has over 15 years of experience building partnerships & BD teams at:

AMERICAN
EXPRESS

Optimizely

GGVCAPITAL

Amplitude

deel.

INTRODUCTION

We are thrilled to present the Ecosystem Compass Report 2025, an essential resource for companies looking to grow their partnership businesses.

As you know, partnerships can be transformative. Their role in driving business growth and increasing competitiveness is undeniable.

In fact, according to our survey of industry leaders, **37 percent of respondents said they source more than 30 percent of their company's total revenue through partnerships. Close to 80 percent of those surveyed garnered about 15 percent of their total company revenue through partnerships.**

Even more impressive, this trend is growing. We found that 65 percent of the industry leaders we surveyed are seeing more than 20% year-over-year revenue growth in their partnership revenue.

Deciding which strategic partnerships to invest in for maximum impact can be tricky. Benchmarking your performance and understanding which organizations to emulate can be even more challenging. That's why we created the Ecosystem Compass Report. Our research will help you make partnership decisions that are highly strategic and low-risk. Instead of making decisions based on incomplete or outdated information, this report will help you identify opportunities for growth backed by recent, accurate data.

The Ecosystem Compass Report is rooted in research.

This document results from extensive qualitative and quantitative surveys of industry leaders and their companies. We then combined that data with our proprietary algorithm, which rates partner ecosystems on the opportunity they provide partners and their level of investment.

Use this tool as an easy-to-digest way to understand:

1. The ecosystems with the largest opportunities for you and your partner team
2. Partnership strategies to emulate and use as a benchmark for excellence

What is included?

- The Ecosystem Compass Quadrant with supporting research and takeaways
- A comprehensive survey of top ecosystem companies with key insights and themes

How can I best use the Ecosystem Compass?

As a business leader, you can use this report as a resource when making strategic partner decisions, to get a sense of how you are performing in relation to your peers, and to identify opportunities for improvement in your partner programs.



INTRODUCTION TO ATLAS, BY PARTNERSHIP LEADERS

Partnership Leaders elevates partnership careers with expert insights that cut through the noise. More than 2,000 of the world's top partner professionals grow with us through the network, events, and resources we build together. Atlas, by Partnership Leaders, is built on a foundation of rigorous industry analysis and practical frameworks, empowering partnership leaders to navigate complex ecosystems with confidence. By producing in-depth reports like the Ecosystem Compass and offering actionable insights, we help organizations benchmark their performance, identify growth opportunities, and implement proven strategies.



Penny Byron

*Director, Partner Ecosystem, Demand Generation
and Go-to-Market Strategy*

BRIDGE PARTNERS

*Penny has over 17 years of experience building
partnerships at:*



INTRODUCTION TO BRIDGE PARTNERS

Bridge Partners is the growth consultancy for technology enterprises. Since 2007, we've partnered with the world's most impactful companies to bring innovation to market and unparalleled expertise in the Partner Ecosystem space.

Bridge Partners solutions connect transformational strategic planning to seamless execution, delivering material growth impact across 200 enterprise-grade technology partnerships spanning the past two decades.

We're proud to come together with Partnership Leaders to put industry insight and best practices to work.

Together we're committed to deeply understanding and advancing the practice of Partner Go-to-Market, delivering growth and impact to our customers and the industry as a whole.



THE ECOSYSTEM COMPASS QUADRANT

We set out to identify the leading partner programs in the world via a thorough analysis of both the opportunities they provide to their partners and the investments made in the Partner Program, since both need to exist for an ecosystem to be successful. We looked at the 5,000 top-performing technology companies across a series of indicators, including revenue, growth, product innovation, partner program investments, market presence, and category leadership to establish a base dataset of thousands of companies. We then ran thorough analysis to narrow this list down to the top 60 partner ecosystems in the world, which are plotted on the quadrant below.

QUADRANT METHODOLOGY

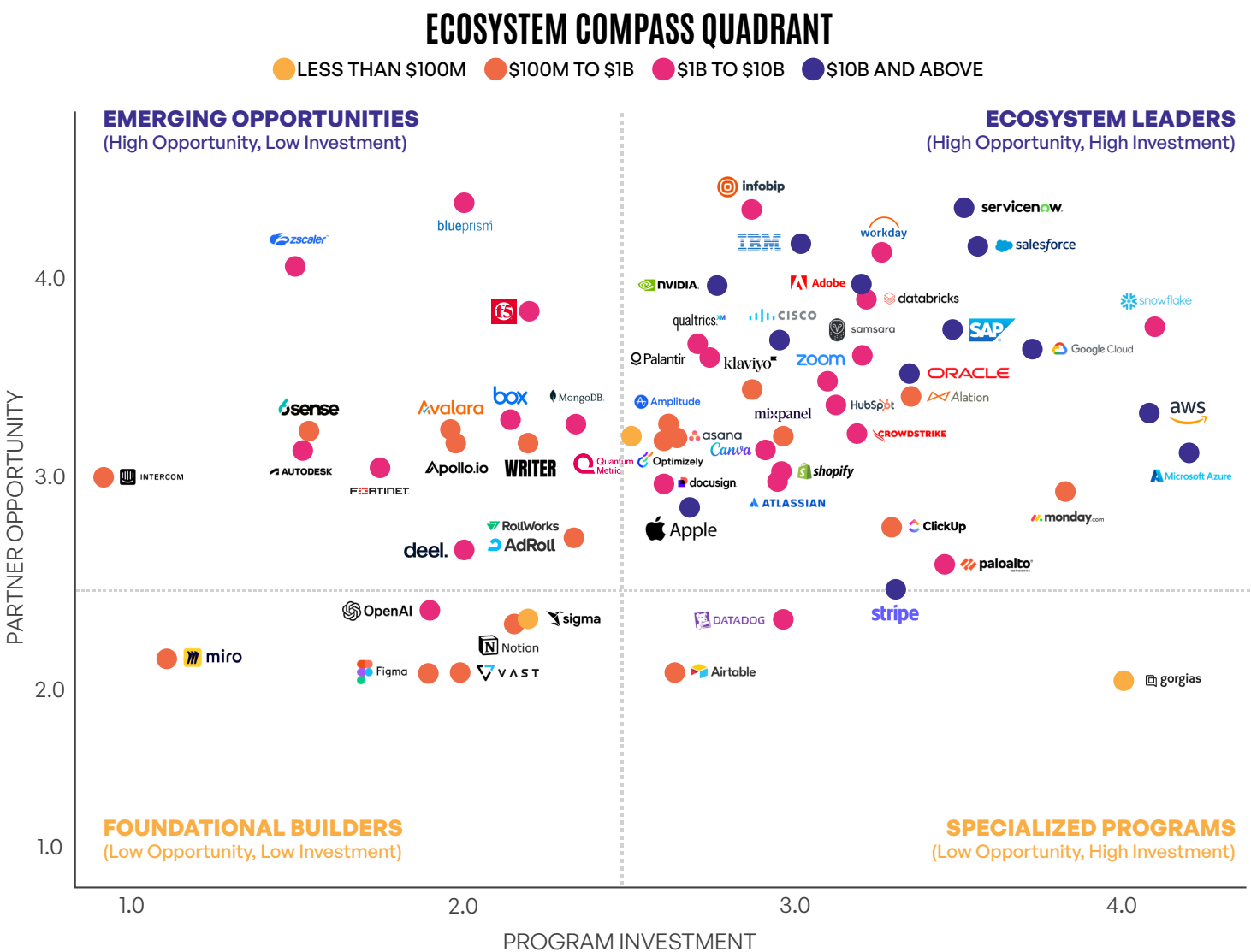
Partner Opportunity

We used a variety of data to calculate partner opportunities when creating the Ecosystem Compass Quadrant, including the volume of customer interest in the ecosystem, product ratings, and the average value of a customer.

Using this method, a company can score high if they provide a significant distribution opportunity, have an exceptional product, or if their average customer value is high. All of these factors indicate positive revenue-generating opportunities and the strongest performing companies will have high scores in all three areas.

Program Investment

Some of the data we used for assessing partner Program Investment included the ratio of partnership (and related titles) employees compared to other roles in the business. We also evaluated the program and marketplace maturity of companies and the resources they invested in highlighting the partners participating in their programs.



TOP PERFORMING ECOSYSTEM LEADERS



Looking at the top 5 performing companies, all had outsized investments in helping their partners build businesses, including deep training programs and thriving marketplaces with proactive lead generation and customer incentives. All had large demand for partner solutions and services on top of their platform and a sizable average customer value.

In addition to the above, here are some recurring themes we identified among the top 5 companies in 2025:

1. Providing Opportunities to Partners to offer specialized solutions and Create New Revenue Streams

All five of the top-performing Ecosystem Compass companies are offering enablement programs that allow their partners to develop niche skills and solutions for specific sectors/practices/tools etc. to enhance their go-to-market capabilities and expand their service and solution offerings to grow revenue.

Below, you will find examples of these programs:

COMPANY	EXAMPLE	PROGRAM OVERVIEW
	AWS COMPETENCY PROGRAM	This program recognizes APN Partners for their technical proficiency and proven customer success in specialized solution areas, making it easier for customers to find trusted partners. Partners enroll in either the Software, Services, or Hardware Path depending on their offering.
	SNOWFLAKE READY VALIDATION PROGRAM	This program recognizes partners who have completed a third-party technical validation of their integrations with Snowflake. Partners must meet specific criteria, including having a native connector for at least six months and demonstrating successful implementations with joint customers. Achieving this status provides partners with a Snowflake Ready Technology badge, marketing support, and access to best practices documentation.
	SALESFORCE NAVIGATOR PROGRAM	Salesforce Navigator Program allows partners to earn distinctions by demonstrating product and sales skills. Partners can achieve Level I Specialist, Level II Specialist, and Expert distinctions in various product, industry, and service categories. These distinctions are awarded based on successful customer implementations and obtaining relevant certifications. Partners who achieve these distinctions receive badges that enhance their visibility on platforms like AppExchange, showcasing their expertise to potential customers.

COMPANY	EXAMPLE	PROGRAM OVERVIEW
	SERVICENOW PARTNER SPECIALIZATION	This program lets partners earn specializations by demonstrating product and sales skills, and the program initially offers three specializations: Service Operations, Customer Experience, and Employee Experience. Partners who achieve a specialization receive badges on their ServiceNow profiles and increased visibility.
	WORKDAY SOFTWARE CONNECT PARTNERS	Workday's Software Partner Integration Badges validate partners' ability to design, develop, and support seamless integrations within the Workday ecosystem. These badges include Workday Approved (minimum interoperability standards), Workday Certified (highly efficient integrations meeting 90% of use case requirements), Workday Built (collaborations directly with Workday product teams), Workday Global Payroll Certified (functional payroll integrations), Workday Content Cloud Approved (metadata validation for content providers), and Workday Design (building blocks for third-party interoperability). Each badge enhances partner credibility and strengthens their role in delivering high-quality solutions.

Spotlight: AWS Competency Program

AWS Partners participate in the **AWS Competency Program** to showcase their expertise, increase revenue, and grow their AWS practices.

The Competencies can be viewed from three perspectives: industry, use case, and workload.

Industry-focused competencies include Healthcare & Life Sciences, Financial Services, Retail, Government, Industrial Software, Education, and Travel & Hospitality.

Use Case-focused competencies include AWS Built-in (Software), Cloud Operations (Services and Software), Containers (Software), Conversational AI (Services and Software), Cyber Insurance (Software), Data and Analytics (Services and Software), DevOps (Services and Software), Digital Sovereignty (Services), Digital Workplace (Services and Software), Generative AI (Services and Software), High-Performance Computing (Software), IoT (Services, Software, and Hardware), Level 1 MSSP (Services and Software), Machine Learning (Services and Software), Mainframe Modernization (Services and Software), Migration and Modernization (Services and Software), Networking (Services and Software), Resilience (Services), Security (Services and Software), and Storage (Services and Software).

Workload-focused competencies include Microsoft Workloads (Services and Software), Oracle, SaaS, and SAP.

To attain these Competencies, partners must demonstrate repeated customer success, technical proficiency, and a solid approach to bringing their solutions to market in each AWS solution area. Achieving an AWS Competency adds a validated designation to a partner's profile on the AWS Partner Solutions Finder, making it easier for customers to find providers that meet their specific needs.

Sample Competencies

Industry View:

AWS Advertising and Marketing Technology Competency Partners

Drive innovation and unlock greater business value with AWS Specialization Partners that have deep technical knowledge and proven customer success

Contact AWS Partner Sales

A new generation of foundation models from Amazon | Amazon Nova: new state-of-the-art models to enhance video and image content creation »

Customers can work with AWS Advertising and Marketing Technology Competency Partners to innovate faster, operate efficiently, and interoperate together across five critical solution areas for their advertising and marketing technology workloads. These include: Audience & Customer Data Management, Privacy-Enhanced Data Collaboration, Ad Intelligence & Measurement, Ad Platforms, and Digital Customer Experience. AWS Advertising and Marketing Technology Competency Partners are differentiated and validated through AWS Solution Architects rigorous testing and use cases. They have proven themselves in the industry to follow AWS best practices, passed a high-bar technical review and have demonstrated customer success in these areas.

AWS Competency: The [AWS Competency Partner Program](#) is designed to identify, validate, and promote AWS Partners with demonstrated AWS technical expertise and proven customer success. The AWS Competency Partner Program has validated that the partners below have demonstrated they can help customers migrate applications and legacy infrastructure to AWS.



PARTNER
Advertising and Marketing
Technology Competency



2. Innovative AI Products are creating new Revenue Opportunities for Partners

Partners are building specialized innovative services on top of new AI features to generate additional revenue and offer cutting edge solutions to their existing customers as well as landing new customers.

Below you will find examples of these services and features:

COMPANY	EXAMPLE	PRODUCT OVERVIEW
	 Amazon Bedrock	Flagship AI service with custom model import for integrating pre-trained models and model evaluation for selecting best models.
	AI & ML STUDIO	A fully managed platform integrating data storage, compute, and AI/ML tools including features like role-based access control, scalability, and AI framework integration.
	WORKDAY EXTEND DEVELOPER COPILOT	An AI-powered tool integrated within Workday Extend's App Builder. It offers natural language search and chat, text-to-code generation, and rapid learning capabilities.
	Agentforce	Salesforce Agentforce is a low-code platform that allows companies to build, customize, and deploy AI agents to support customers and employees
	NOW ASSIST	Now Assist is a growing cross-platform family of generative AI features, which are tasks that a large language model (LLM) can perform within the ServiceNow platform.

Spotlight: Snowflake AI & ML Studio

Snowflake's AI & ML Studio enables partners to quickly develop and deploy custom AI solutions tailored to client needs. Using the no-code interface, partners can efficiently build machine learning models like predictive models or forecasting tools. They can also fine-tune large language models (LLMs) to create specialized applications, such as document analysis tools using Cortex AI's fine-tuning features. The Studio enables comparison of responses from different LLMs, allowing partners to choose the best model for each task, balancing performance and cost. With features like Cortex Search and Document AI, partners can create advanced solutions that effectively utilize both structured and unstructured data.

Example:

“PurpleCube AI partners with Snowflake to Revolutionize Data Engineering with Next-Generation AI and Machine Learning”

PurpleCube AI partners with Snowflake to Revolutionize Data Engineering with Next-Generation AI and Machine Learning



“Integrating PurpleCube AI’s Gen AI module with Snowflake’s LLM functions not only enhances the efficiency of data orchestration but also promises unparalleled value in AI-driven insights. This partnership enables organizations to seamlessly deploy advanced AI solutions across their entire enterprise ecosystem, driving innovation and competitive advantage.”

Bharat Phadke, CEO & Co-founder at PurpleCube AI

- **Data Orchestration:** Snowflake as a processing engine for push-down ETL workloads.
- **Advanced Exploratory Data Analysis:** Leveraging Snowpark, the Snowflake data lake, and big data output for deeper data exploration.
- **Data Quality for Superior ML Feature Preparation:** PurpleCube AI offers a diverse set of built-in data quality rules.
- **Data Access with English Language Queries:** PurpleCube AI's capabilities alongside Snowflake's data lake, Snowpark, and native SQL functionalities to query and analyze data in plain English.



3. Three of the companies have invested in Advanced Partner-Specific Learning Programs

Partner Specific Training is an area where Salesforce, Snowflake, and AWS have made an outsized investment, these programs combine structured learning paths, practical hands-on experience, and certification opportunities to develop expertise across their platforms. Partners gain essential capabilities while building verifiable credentials, ultimately enabling them to deliver higher value to customers and drive additional revenue opportunities.

COMPANY	FEATURE	WHAT MAKES THIS LEARNING PROGRAM UNIQUE?
	PARTNER LEARNING CAMP (PLC)	Salesforce's Trailhead training and certification program is arguably the leading ecosystem enablement program in the world. The Partner Learning Camp is a curated set of courses, assets, and certifications. It makes it easy for partners to navigate to the most relevant resources for their stage and desired outcomes.
	SNOWFLAKE PARTNER LEARNING	Snowflake Partner Learning equips partners with specialized training and certifications to thrive in the Data Cloud ecosystem. The program offers role-based courses covering data engineering, architecture, administration, and advanced analytics, along with hands-on labs and real-world scenarios. This enables partners to build technical proficiency, achieve certifications, and deliver tailored solutions.
	AWS PARTNER TRAINING AND CERTIFICATION PROGRAMS	AWS Partner Training provides targeted learning paths, certifications, and resources to help partners develop cloud expertise and grow their AWS business. The program covers key topics such as cloud foundations, migration, security, AI/ML, and industry-specific solutions tailored to various partner roles.

Spotlight: Salesforce PLC

Partners engage with **Partner Learning Camp** by accessing its on-demand training and curated resources tailored to their specific roles and goals. They participate in learning paths to deepen their product and industry expertise, earn Navigator distinctions to showcase their capabilities and stay informed through virtual and in-person events. The platform empowers partners to track progress, gain certifications, and apply their skills to deliver impactful customer outcomes.



Partner Learning Camp
Partner Learner

[Home](#)[Browse Catalog](#)[Profile](#)[Events](#)[Credentials](#)



Welcome, Leighton Tso!
Let's get ready to learn.

12%
Completion

6
Completed Courses

43
Incomplete Courses

Current Assignments

Curriculum



Simple Demo Org...

Curriculum



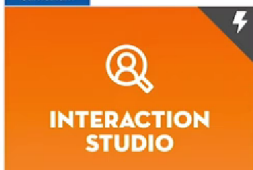
Get to Know Financial...

Curriculum



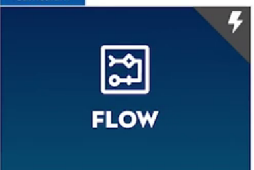
Get Started with Digital...

Curriculum



Get Started with...

Curriculum



Process Automation

Curriculum



Get to Know Health Cloud

Partner Support

Here to help!

Partner News & Events

Stay Up-to-Date

WANT MORE?
DIVE INTO SPECIFIC MODULES



Scheduled Sessions & Activities



Looks like you've got nothing lined up for now.

Completed Courses & Activities

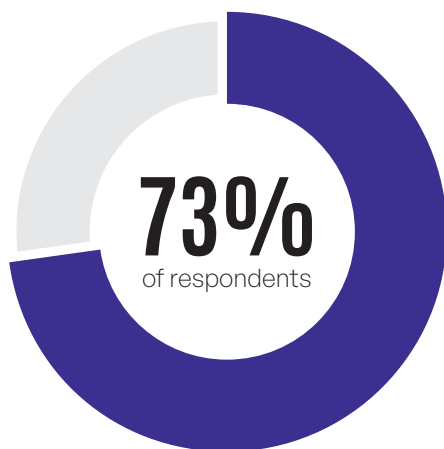
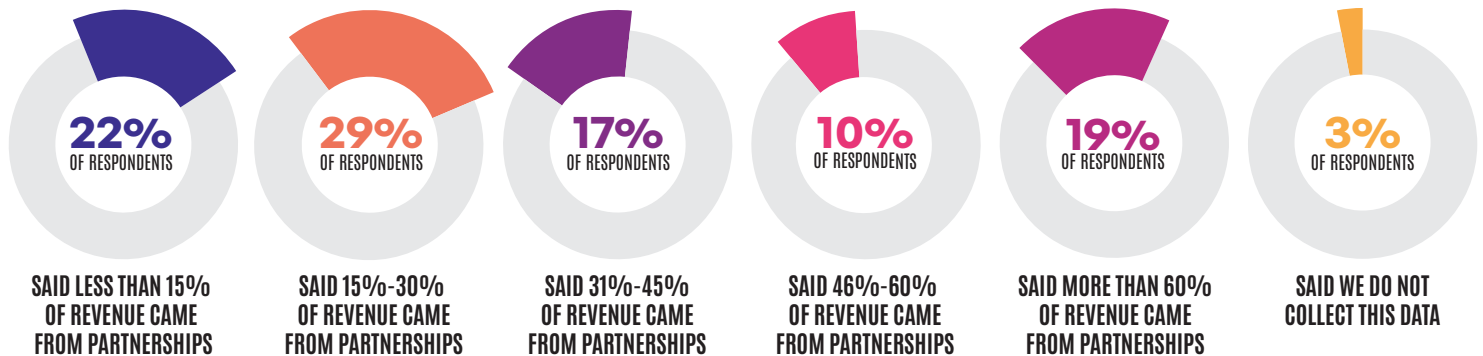




ECOSYSTEM COMPASS 2025 DATA PULSE

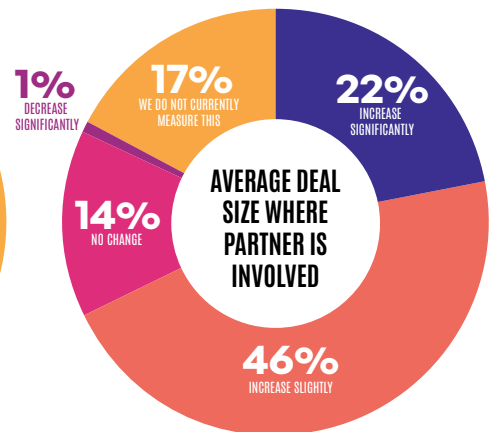
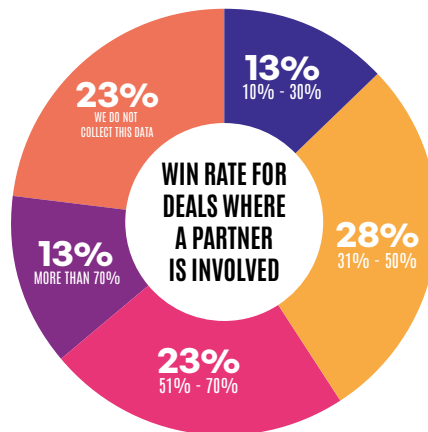
SOURCING REVENUE

PERCENTAGE OF TOTAL REVENUE GENERATED THROUGH PARTNERSHIP

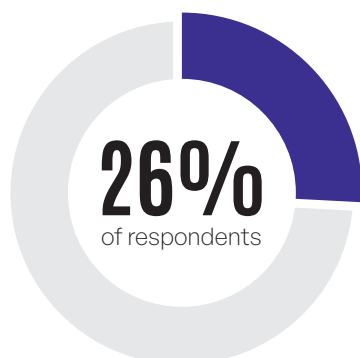


REPORT THEIR PARTNERSHIP GOALS NOW ALIGN WITH COMPANY STRATEGY, A NOTABLE IMPROVEMENT FROM PAST MISALIGNMENT, HIGHLIGHTING PARTNERSHIPS' GROWING ROLE IN BUSINESS STRATEGY.

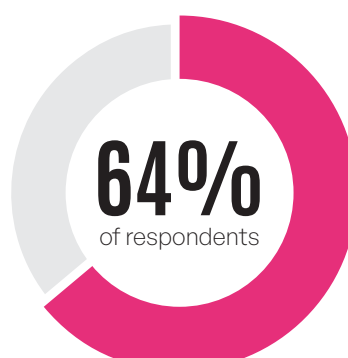
IMPACT OF PARTNER INFLUENCE



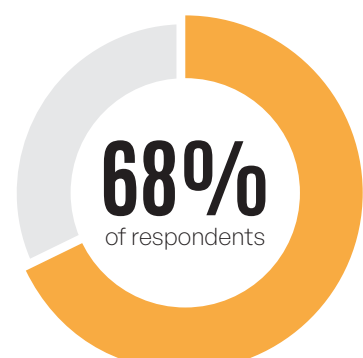
Partners Improve Deal Quality and Sales Efficiency



REPORTED THAT
MORE THAN HALF OF NEW CUSTOMERS ARE INFLUENCED OR CO-SOLD WITH PARTNERS.



CLOSE RATES ABOVE THE
INDUSTRY AVERAGE WITH PARTNERS INVOLVED.



INCREASE IN AVERAGE DEAL
SIZE WHEN PARTNERS INFLUENCE A DEAL.

- Partners drive better deal quality and higher efficiency, impacting both close rates and deal size.
- Cultivating strong partner relationships is key to enhancing business outcomes.

PARTNER ENABLEMENT REMAINS A MISSED OPPORTUNITY

47%

of respondents

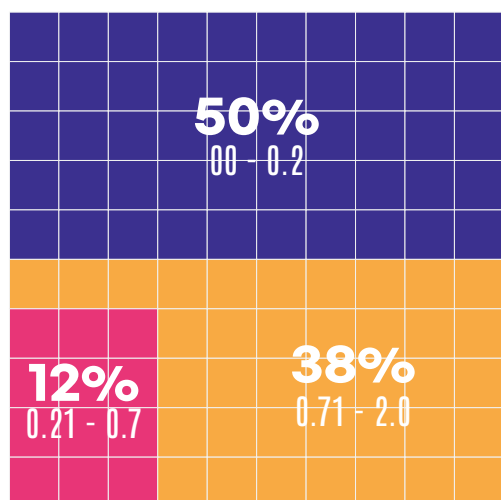
Offer limited or no partner training.

48%

of respondents

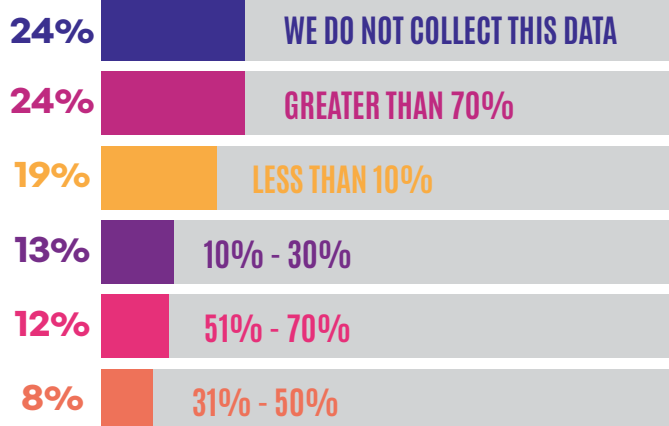
Fewer than half of active partners engage with program benefits.

RATIO OF LEADS SENT TO PARTNERS VS RECEIVED FROM PARTNERS

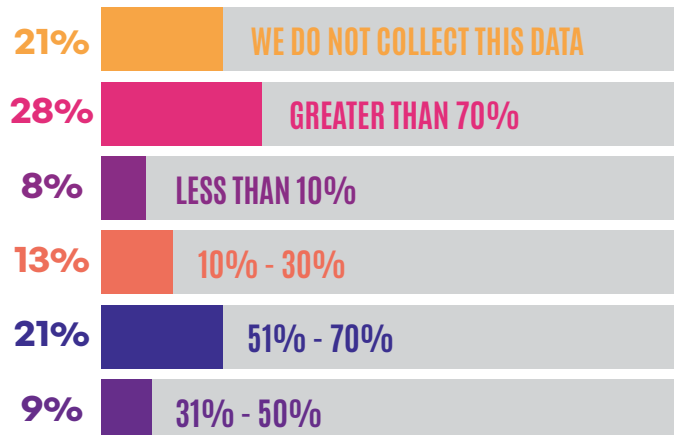


PARTNER ADOPTION

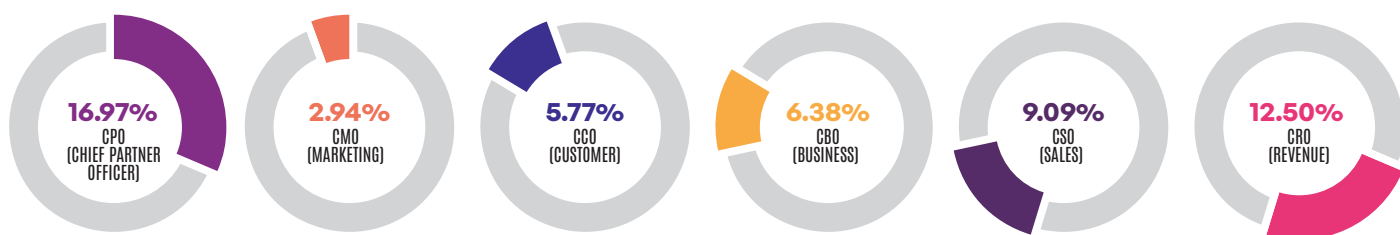
PERCENTAGE OF CUSTOMERS THAT ACTIVELY USE AT LEAST ONE SERVICE PARTNER



PERCENTAGE OF CUSTOMERS THAT ACTIVELY USE AT LEAST ONE PARTNER INTEGRATION



CHIEF PARTNER OFFICER IS THE FASTEST GROWING ROLE IN THE GTM C-SUITE



• Based on total titles on LinkedIn FY '24

TOP COUNTRIES FOR PARTNERSHIPS COMPENSATION



GLOBAL PARTNERSHIPS COMPENSATION AVERAGES



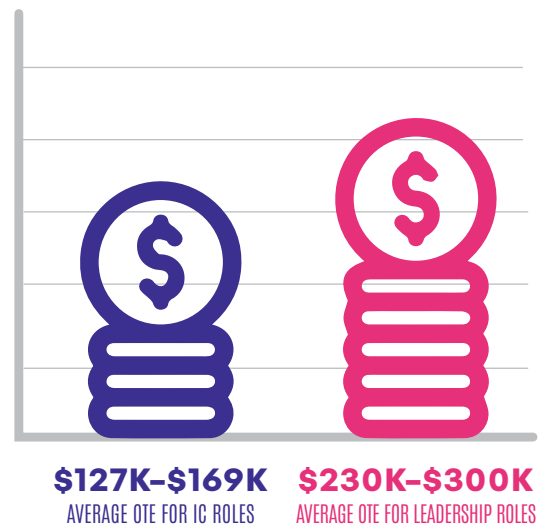
AVG. % OTE VARIABLE PAY **33%**

AVG. % QUOTA ACHIEVEMENT **104%**

100

50

0



COMPENSATION BY YEARS OF EXPERIENCE



HOW DO YOU ALIGN YOUR PARTNER PROGRAM GOALS WITH THE OVERALL CORPORATE STRATEGY?



1. Top-Down Approach

- Leadership Directives
- Policy Alignment



2. Integrate with Planning Process

- Strategic Planning Meetings
- Cross-Department Collaboration



3. OKR Alignment

- Objective Setting
- Key Result Tracking

HOW DO YOU MEASURE THE SUCCESS OF YOUR PARTNER PROGRAM?



1. Revenue Metrics

Focus on financial impact and growth



2. Engagement & Satisfaction

Assess partner relationships and contentment



3. Customer Success

Evaluate the program's effect on customer outcomes

WHAT ARE THE PRIMARY STRATEGIC GOALS OF YOUR PARTNERSHIP PROGRAM?



PARTNERSHIP INDUSTRY THEMES 2025



Analyzing the most emergent trends from the Ecosystem Compass submissions and supporting research from our team, we identified the three most significant industry themes we saw, which we expect will continue to grow in importance in 2025.

1. Ecosystem Marketplaces: Generating Value at Scale

Ecosystem marketplaces are an essential component of partnerships. Over the years, they have evolved from simple directories showcasing partner offerings to powerful platforms driving revenue, enhancing customer value, and strengthening the partner ecosystem.

Initially conceived to highlight partners in directories and listings, marketplaces have transformed into centralized platforms where customers, partners, and internal teams converge. Now, they are a vital part of modern ecosystems.

Despite their importance, many organizations are not fully leveraging the potential of marketplaces.

According to our survey, **48% of companies have no way to capture leads for their partners on their marketplace or directory**, and **54% of companies don't track the number of transactions occurring in the marketplace**. Additionally, only **20% see positive engagement from customers**, indicating significant room for improvement.

Addressing these challenges will set the stage for increased marketplace investment, unlocking substantial value for partners and customers.

An Ecosystem's Hub for Partners, Customers, and Employees

A marketplace provides a frictionless selling and buying experience that brings parity to first and third-party solutions. This isn't a new thing, look at what Microsoft said about their Marketplace in 2019.

"Partners can sell directly to more than a billion customers and partners, benefitting from lower deployment costs and flexible procurement models for software. Through using go-to-market services in the marketplace, we've seen partners achieve an average of 40 percent reduction in cost per lead, and a 2x lead conversion to sales rate compared to industry averages."

Gabriella Schuster - Former Corporate Vice President, One Commercial Partner

Salesforce AppExchange, one of the earliest marketplace examples, launched almost 20 years ago with a focus on listing trusted apps to enhance the Salesforce platform. This marketplace has grown into a critical driver of ecosystem value, offering features like transactional capabilities, lead generation, and analytics for partners. Salesforce AppExchange hosts over eight thousand apps and experts, with more than 12 million customer installs, opening a vast potential audience for partners.

The Marketplace Benefits Buyers and Sellers

Offering services through a marketplace benefits customers as well as partners.

Customers benefit from streamlined procurement, consolidated billing, and access to vetted solutions that integrate seamlessly into their existing systems when they purchase through an ecosystem marketplace. The most mature marketplaces go further by incentivizing customers to purchase through them.

As an example, AWS Marketplace offers steep volume discounts on their AWS service for customers willing to commit to a higher spending level. They can use these discounts with AWS or through the marketplace, making it an attractive option for enterprises to maximize their software budget while simplifying their processes.

According to AWS, their customers experienced a **75% reduction in onboarding efforts for new vendors. This led to a time savings of 66% due to procurement efficiencies**, and a **10% reduction in licensing costs**.

These marketplace incentives encourage participation by creating a compelling value proposition for customers.

Customer Voices



"Microsoft AppSource provides an efficient way for us to deploy solutions that integrate seamlessly with Microsoft platforms, enabling better collaboration across our



"The Salesforce AppExchange has been instrumental in helping us customize our platform and scale our CRM efforts globally with vetted, reliable solutions."

"AWS Marketplace allowed us to standardize our software procurement process, streamline our operations, and ensure compliance across global teams."



GE Healthcare

"Using AppSource, we found tailored solutions that perfectly met our operational needs, driving faster adoption and better performance."



Heineken®

How to Stand Out in a Crowded Ecosystem

Ecosystem marketplaces provide direct access to a large pool of prospective decision-makers who are actively looking for solutions, with an established purchasing process and large incentives to make purchases.

However, this success means these marketplaces are busier every year. The challenge, then, is differentiating your solution from others.

Recommendations for standing out from the crowd:

1. Align Offerings With Ecosystem Priorities

As a partner, you can receive additional exposure when your solutions complement strategic initiatives and address important customer needs. This requires discovery and research to ensure your products align with the priorities of your customers, which will then enhance your chances of being featured and recommended.

2. Optimize Listings for Discoverability

With a vast number of offerings, you need to stand out from the competition. High-quality listings with clear value propositions, customer testimonials, and optimized keywords can significantly improve both your visibility and your customer engagement. Encourage marketplace purchases, reviews, and testimonials to quickly elevate your listing.

3. Engage in Co-Marketing Initiatives

Be sure to participate in the regular marketing program launches and initiatives announced by ecosystem marketplaces. Many partners neglect to take this action, which is a mistake. It's through these initiatives that you'll find opportunities to be featured on co-marketing initiatives, which will put you in front of more potential customers.

4. Foster Relationships With Internal Teams

Collaborating closely with account managers and program leaders will unlock customer introductions and promotional opportunities. We can’t overstate how critical it is to bring your joint value proposition directly to the people who are having conversations with your target customers.

Evolving Your Marketplace Maturity

What about organizations developing their own ecosystems?

To succeed in your own marketplace, your organization must create a platform that delivers value to partners and helps connect them with customers. This is essential if you want to scale value for partners.

While they might have lofty goals, many organizations face challenges in execution when developing their own ecosystem.

Despite the majority of respondents having a directory or marketplace, **48% of companies we surveyed had no form or way to capture leads for their partners**, and **54% were not tracking the number of transactions occurring in the marketplace**.

To take the pulse of your organization’s marketplace, use our **Marketplace Maturity Score** as a framework for evaluation and improvement:



Do You Need to Go Beyond Level 3?

Every company with a partner program should be able to send referrals and contribute opportunities for co-selling to their partners. For many, a directory provides a way to increase the visibility of these partners beyond enabling internal teams to speak with customers.



However, for most companies, achieving a level of maturity where you are proactively sending customers to your directory, capturing leads, sending them to partners, and measuring the outcomes is a successful endpoint.

Not all companies should build an ecosystem marketplace, so how do you know if you should?

1. Your executive team aspires to be a category leader and the central hub of your ecosystem.
2. Your executive team is committed to capturing additional transactions to increase customer commitment.
3. Your executive team is dedicated to capturing transaction margin as a meaningful revenue stream.
4. You have a large enough volume of customer inquiries that it justifies building a marketplace, or you have the marketing commitment to create this volume.

If any of these are a no, or even a maybe, we would recommend seeking Level 3 as your target maturity level.

Top Tips for Advancement:

- Track everything, including visits, clicks, conversions, close rates, customer impacts, and partner performance impacts. You will need to make the case for maintaining and improving your marketplace constantly, and this will be much easier with the right supporting data.
- Take advantage of the great tools on the market that offer out-of-the-box directories. These will give you advanced listing functionality and lead capture mechanisms, helping you to skip straight to Level 3.
- Use simple examples with the executive team to help them understand the power of an ecosystem marketplace—the Apple App Store is a great example. Explain to them how the App Store provides a huge distribution for developer partners, a powerful yet simple experience for customers, and strategic advantages for Apple, including ecosystem ownership, customer lock in, and considerable revenue streams.
- Collaborate with the finance and product teams early. Partnership teams are used to working with sales and marketing teams as their primary internal stakeholders, however for marketplace development you will need to rely significantly on the finance and product teams resources, which will require planned and ongoing commitments.

2. Aligning Strategic Partnerships with Corporate Strategy

Strategic partnerships are most effective when they are deeply integrated into the company's broader corporate strategy.

In our survey, **77% of respondents said they believe their partnerships are mostly or perfectly aligned** with their corporate strategy, and **92% say partnerships contribute to revenue growth and improve market presence. Almost half—46%—attribute significant revenue growth and enhanced competitive positioning** to these efforts.

While these responses are impressive, we also found that this alignment often falters in execution. In areas like product innovation roadmap, **72% report only slight or no improvement** as a result of their partnerships. In our experience this is most likely due to a lack of alignment with the product organization, which we will explore later in the report.

What Makes a Strategic Partnership Distinctive?

Strategic partnerships are defined by their deep alignment with a company's long-term goals and their transformative potential.

To determine if a partnership is strategic, consider these key criteria:

1. Executive Sponsorship and Strategic Alignment

Strategic partnerships originate from C-Level priorities and directly support the company's long-term vision, such as entering new markets, driving innovation, or securing competitive advantages. Successful partnerships are embedded in the corporate strategy and receive sustained executive attention and resources.

2. Significant and Broad Business Impact

A partnership is strategic if it drives outcomes that meaningfully affect multiple facets of the business, such as revenue growth, competitive differentiation, or operational efficiency. This includes partnerships that deliver access to proprietary technologies, create differentiated offerings, or enable entry into high-value markets.

3. Long-Term and Cross-Functional Engagement

Strategic partnerships require substantial investment and collaboration across the organization. They span multiple departments—such as sales, product, marketing, and operations—and are built on shared goals, co-investment, and governance structures to sustain their long-term value.

By evaluating a partnership against these criteria—executive sponsorship, enterprise-level impact, and cross-functional engagement—companies can confidently identify relationships that qualify as truly strategic.

Joining or Initiating the Build, Buy, Partner (BBP) Process to Identify Strategic Opportunities and Improve Product Alignment

The Build, Buy, Partner (BBP) framework helps companies decide how best to achieve objectives—whether to develop capabilities internally via the product team, acquire them through mergers and acquisitions, or collaborate with external partners to develop joint solutions. Partnership leaders should play a critical role in this process, given their deep knowledge of the broader ecosystem that includes both potential partners and acquisition targets.

Not all companies approach growth or strategic decisions in this systematic way, however.

For partnership leaders, the challenge may be to not only participate in but to also initiate a BBP process that capitalizes on strategic partnership opportunities.

1. Initiate BBP Thinking in the Absence of a Formal Process

If a company does not have an established BBP process, partnership leaders can take the lead in introducing the process. This involves educating stakeholders on the framework's benefits and providing real-world examples of how Build, Buy, and Partner options can address strategic gaps. We have provided some examples of strategic partnerships below to help you with this discussion.

2. Demonstrate Your Knowledge of the Ecosystem

To contribute meaningfully, partnership leaders must first demonstrate their knowledge of the ecosystem. We recommend proactively mapping the ecosystem and potentially identifying companies that could fill strategic gaps through partnership or acquisition, or working with your executive team to go through this exercise. This analysis can include specifics such as the partner's capabilities, alignment with corporate objectives, and the scaling potential for top-performing companies in the ecosystem.

3. Act as a Bridge Between the Ecosystem and Corporate Strategy

Partnership leaders are uniquely positioned to bring insights and actionable recommendations from the ecosystem to the executive team. Unlike internal teams, partnership leaders understand the role external companies play in the ecosystem and how they could impact strategic goals. You should document and distribute this knowledge to the executive team. All of the data you are collecting through conversations with partners such as partner roadmaps, adjacent industry trends, rumors, and competitor intel should be considered highly valuable.



Ron Piovesan

Head of Technology Partnerships
Okta

"Partnerships are a critical window for management into innovation, customer trends, and who else in the market is doing well. Partnerships are about conversations and exchanges of information. Management will have a particular perspective on the market. Partners may validate, enhance, or challenge that perspective. All these data points are key when planning integration or GTM strategies, traditional partnership functions."

Armed with industry and customer insight from partners, partnership leaders can provide a new and distinctive point-of-view to inform corporate strategy, investment, and M&A decisions also. This can include insight into customer preferences, new GTM motions, actions of competitors, or emerging companies that are making waves in the market. By aggregating and presenting these sorts of insights, partnership leaders become a force in corporate development conversations."

3. Measuring the Impact of Solution Partners to Increase Customer Referrals

Solution Partnerships are a critical partner strategy.

Most companies utilize agencies, system integrators, consultants, and advisors to help scale their teams, achieve goals, and make better decisions. These companies rely on trusted experts when buying and adopting technology

However, even though Solution Partners are a well-known method for accessing new customers and driving customer success, only **60% of respondents reported engaging in solution partnerships**.

This represents a substantial missed opportunity.

In addition to being a powerful channel for referrals, the quality of services delivered through solution partners is overwhelmingly positive.

In our survey, **89% of respondents rate their solution partner's services as good, very good, or excellent**, and **69% reported high customer satisfaction** with joint services.

However, our survey found a major gap in measuring results—**30% of respondents don't track the adoption of solution partner services by their customers**, which represents a missed opportunity to quantify partner impact and drive organizational maturity. We found **22% of respondents have achieved over 50 percent customer adoption of solution partner services**, which is a great benchmark to target.

What Solution Partners Seek in Technology Partnerships

Solution Partners work with technology companies primarily to bring innovative products to their customers, enhancing their reputation as trusted experts while unlocking new service opportunities.

They often have several solutions to choose from when selecting which technologies to recommend to their customers, so here are some qualities that can set a technology company apart from the crowd:

- **Ability to Deliver Innovation to Customers**

Solution Partners seek partnerships that enable them to offer cutting-edge products or technologies to their customer base, positioning themselves as leaders in innovation. A partnership that provides access to differentiated, high-demand solutions strengthens the partner's value proposition and opens doors to new revenue streams through services tied to those products.

- **Referrals and Revenue Opportunities**

Beyond innovation, Solution Partners value partnerships that drive direct business growth—particularly referrals. Lead-sharing mechanisms, co-selling frameworks, and joint financial incentives can help solution partners scale their businesses while aligning their success with the technology provider's strategic goals.

- **Operational Simplicity and Support**

Streamlined onboarding, contracting, and enablement processes are critical for reducing friction and ensuring a seamless partnership experience. Offering co-marketing initiatives, training programs, and go-to-market support further enhances the partner's ability to succeed in delivering your solutions.

"We sell solutions rather than technology. Our ultimate goal is to develop partnerships that further our efforts to create outsized value for our customers. Our partners need best-in-class technology, innovation, and flexibility to work in ways that make sense for us and our customers."



Kelly Stratman
Global Leader Partner Ecosystem
Strategy and Operations
EY

Drive Referrals by Measuring Solution Partner Impact

To unlock the full potential of Solution Partner services it's critical to track adoption rates. This will demonstrate their value to internal stakeholders, especially customer success teams.

Without this data, partnership organizations can neither build a compelling case for using customer success to drive customers to work with Solution Partners nor satisfy the solution partner network's desire for referrals.

- **Measure Adoption as the Foundation of Your Approach**

Measuring solution partner adoption rates and the resulting impact on the business should provide the baseline data needed to evaluate the reach and impact of solution partner services. Compare customers who work with a Solution Partner to customers who don't on every metric the customer success team cares about: speed of implementation, product adoption, retention, expansion, and number of support requests.

- **Prove Value to Customer Success Teams**

Customer success teams are focused on accelerating value for customers, driving product adoption, and ultimately increasing retention and expansion. Demonstrating the positive outcomes of solution partner engagement creates a clear incentive for these teams to champion partner services. Work with the leaders within the customer success organization to establish a common understanding of the value of customers adopting solution partner services.

- **Integrate Partners into Customer Success Workflows**

Provide CSMs with a curated list of recommended partners tailored to customer needs, sectors, regions, and products. Equip them with enablement resources like partner profiles and case studies, and align incentives by tying performance metrics to partner adoption and customer outcomes tied to partner services. CSMs rarely get SPIFFs.

Key Data: Solution Partnerships

- Even though 60% of respondents have Solution Partnerships, this number is still surprisingly low. Every product has a partnership opportunity, so this means Solution Partnerships are still an underutilized strategy.
- When it comes to partnerships, satisfaction levels are extremely high. We found that 89% of those surveyed believe the quality of services delivered by solution partners are good, very good, or excellent; 69% said customers are either satisfied or very satisfied with the joint services they provide with Solution Partners.
- Our survey uncovered a missed opportunity—we found that 30% of respondents are not currently measuring the adoption of solution partner services by their customers. This means these companies are not taking advantage of the chance to identify positive benefits of partner attachment and graduate organizational maturity levels.
- We found that 22% of respondents have more than 50% of their customers adopting solution partner services. This is an excellent benchmark—especially for companies serving enterprise customers where they will almost always work with an SI or service provider to enable the implementation and adoption of new technology.



CONCLUSION

The Ecosystem Compass 2025 findings highlight the transformative potential of partnerships to drive revenue, enhance market competitiveness, and deliver customer value. With partnerships accounting for a significant and growing share of company revenues and vast operational and customer value benefits, businesses that invest in further in their partnership organization stand to gain a considerable edge.

Three key insights from the report underscore the path forward:

1. *Marketplaces are a Strategic Hub for Ecosystem Value*

Ecosystem marketplaces have evolved into powerful tools that connect customers, partners, and internal teams. Yet many companies underutilize their potential, with 54% failing to track marketplace transactions and only 20% reporting positive customer engagement. Mature marketplaces incentivize customer purchases and provide measurable value to partners.

2. *Strategic Alignment Drives Revenue and Market Presence*

Strategic partnerships aligned with corporate goals deliver outsized impact. Companies with highly aligned partnerships see enhanced competitive positioning, significant revenue growth, and improved customer outcomes. However, misalignment with internal teams remains a barrier to maximizing value.

3. *Solution Partners are an Underleveraged Channel*

Solution Partnerships are critical for customer success and market expansion, yet they remain underutilized, with only 60% of companies engaging in this strategy. Tracking the adoption and impact of solution partner services can unlock new opportunities for collaboration, referrals, and improved customer outcomes.

Three Actions to Take Now

1. *Evaluate Your Strategic Partnerships:* Identify whether your partnerships meet the criteria for strategic value: executive sponsorship, enterprise-wide impact, and cross-functional collaboration. Focus on aligning partnerships more deeply with corporate strategy and product innovation.
2. *Ride the Marketplace Wave:* Use the Marketplace Maturity Score to assess and improve your platform to create partner revenue. Create a strategy for standing out from the crowd in the marketplaces you participate in.
3. *Measure and Leverage Partner Impact:* Start tracking the adoption of partner solutions and compare outcomes for customers who engage with partners versus those who don't. Use this data to engage customer success teams and drive partner adoption further.

