[CLIENT] ’26-’27 Partner Strategy

Turning Partner Acquisition into a GTM machine

November 7th, 2025

Overview

Executive Summary

Objective

Position [CLIENT] for Series A funding by proving a scalable, partner-led GTM model that demonstrates repeatability, efficiency, and predictable growth.

Current Position

~20 deployments (Ford, GM, GE, others). Integrates with existing factory systems plus device-level (PLC) visibility. Market shifting from DIY to AI-driven operational platforms.

2026–2027 Focus

Codify repeatability (playbooks, KPIs). Expand partners (SIs, OT, Cloud, OEM). Validate outcomes (case studies). Prove efficiency (ARR, CAC, Time-to-Value).

Funding Readiness Targets

≥40% partner-sourced ARR | CAC <6 mo | TTV <30d | 10+ case studies. These metrics validate [CLIENT]'s readiness for Series A investment.

GTM Strategy

Focus GTM on corporate operations and digital transformation buyers to enable multi-site deployments from the start.

Strategy

Market & Customer Definition

Focusing on industrial manufacturing companies with *active digital modernization,* the strategy targets corporate DMUs *with 10+ factories* and leverages tiered customer engagement strategies to build credibility through early reference wins.

Segment / Tier	Description / Profile	Examples / Status	GTM Motion	Initial Focus
Target Market	Industries focused on digital modernization	Automotive, Electronics, Heavy Equipment CPG	-	-
Ideal Customer Profile	Corporate DMUs with 10+ factories	Active digital modernization, legacy or DIY systems	-	-
Tier 1	Large enterprise customers with strategic importance	Ford, GE, GM	Corporate HQ-led sales motion	CEO led sales efforts
Tier 2	Mid-market companies with moderate scale	Mid-market enterprises	Enterprise + Partner co-sell	Partner-led
Tier 3	Early adopters with smaller scale or pilot projects	Innovators, early adopters	Direct assist to partner handoff	Pilot / Self-Serve

Tier 1 & 2 Global Addressable Market: ~2,500–3,000 enterprise manufacturers
(Automotive ≈ 1,500–2,000; Industrial Equipment ≈ 500–700; Electronics ≈ 600–800)

Partner Framework Overview

Selection Criteria
Criteria include strong industrial client relationships, technical IT/OT expertise, commitment to enablement, and strategic alignment

Industrial client base, IT/OT depth, enablement investment, alignment

The partner framework is structured around four key partner types, each contributing unique value to enterprise integration, execution, visibility, and device-level data integration. Selection is based on industrial client base, IT/OT expertise, enablement investment, and strategic alignment.

Partner Type	Example Partners	Primary Role	Value Provided
Strategic SIs & Transformation Partners	Tech Mahindra, Deloitte	Enterprise access & program integration	Drive integration across enterprise systems and manage large-scale programs
Regional OT Integrators	CoffeeTree, ATS Global	Execution and support post-sale	Provide on-the-ground execution and ensure operational support
Cloud Alliances	Google Cloud, AWS	Leads, co-marketing, marketplace visibility	Generate leads, collaborate on marketing, and enhance marketplace presence
OEM Partners	PLC Vendors	Device-level data integration	Enable seamless integration of device-level data into systems

Partner Outreach Strategy

Objective: Establish a repeatable, capital-efficient system to identify, recruit, and activate strategic and regional partners across manufacturing verticals.

Approach

Direct Outreach	Direct outreach is standard in manufacturing; integrators expect vendor contact. Website update for attracting partners & value (website, landing page, etc)
Source	Source targets via **CSIA Exchange** and **industry events** (*Automate, Smart Manufacturing Experience*). Networking through partners & Wildcard
Messaging	Lead with **partner value:** services revenue, quick enablement (Hub v1), and deal protection/registration.

Focus Targets

Strategic Integrators	Tech Mahindra, Infosys, Deloitte — enterprise access
Regional Deployers	CoffeeTree, ATS Global, CSIA-certified integrators — factory rollout
Cloud Ecosystem	Google Cloud / AWS — visibility & alignment

Partner Value Proposition

For Partners

- **Central Visibility**: Enterprise deal access + recurring ARR share.
- **Deal Expansion:** Larger projects (10 + sites) = higher margin.
- **Additional Leads:** Shared enablement, marketing, and pipeline visibility.

For [CLIENT]

- Faster market reach & credibility.
- Lower sales cost (CAC).
- Global deployment capacity.

Joint Value: Unified enterprise data and visibility across plants.

Roadmap

GTM Implementation Roadmap

Partner Tiers Finalized

Finalize partner tiers and incentives to establish a clear structure for partner engagement and motivation.

- Partner tier structure
- Incentive program
- Engagement guidelines

Enablement & SI Certs

Launch Enablement Hub v1 and certify 2 SIs (Tech Mahindra, CoffeeTree) to strengthen partner capabilities.

- Enablement Hub v1
- 2 certified SIs (Tech Mahindra, CoffeeTree)
- Partner training materials

Enhance Marketing Strategy

Develop and deploy new web pages & content to message potential partners, providing a content base to provide to potential partners.

- Video
- Co-marketing programs
- Case Studies
- Joint Webinars

Vertical Playbooks Launch

Develop and deploy vertical playbooks for Auto, CPG, and Electronics, and roll out co-marketing programs with KPI dashboards.

- Auto, CPG, Electronics playbooks
- Co-marketing programs
- KPI dashboards

Partner Marketplace Launch

Achieve 10+ certified partners, ≥40% partner-sourced ARR, and launch the Partner Marketplace for expanded growth.

- Partner Marketplace
- 10+ certified partners
- ≥40% partner-sourced ARR

Strategy

Industry Visibility & Thought Leadership

01

Building Brand Credibility

[CLIENT] will build credibility and brand equity through high-impact industry engagements in the intelligent manufacturing sector.

02

Thought Leadership Objectives

1. Establish [CLIENT] as a thought leader in intelligent manufacturing.

2. Drive enterprise leads and partner co-marketing visibility.

3. Build reference momentum through speaking and joint storytelling.

03

Speaking Engagements

Targeting 2 speaking engagements by 2026, such as Automotive Manufacturing North America and Smart Manufacturing Experience.

04

Partner Collaboration

Aim for 1 joint session with a Cloud partner, specifically Google Cloud or AWS, to boost co-marketing efforts and industry presence.

05

Thought Leadership Publications

Publish 3 thought leadership articles by 2026 to share insights and success stories, further establishing [CLIENT]’s expertise.

Integration

Unified GTM Motion

Direct Sales Model

Corporate, enterprise accounts like Ford, GM, and GE are targeted directly by the founders, ensuring personalized outreach and strategic relationship management with high value customers and partners.

New leads generated through partners, industry events and high value webinars.

Partner Sales Approach

Mid-market and regional opportunities are addressed through partner channels, expanding our reach and leveraging local expertise.

Co-Sell & CRM Integration

Shared CRM visibility and attribution enable seamless collaboration between sales teams and partners, improving tracking and accountability.

Marketing Engine Initiatives

Co-branded campaigns (partners, Cloud, AWS, Deloitte, McKinsey), joint webinars, the 'Powered by [CLIENT]' partner kit, and an ROI Case Study library document time-to-value results, driving partner success.

Pricing & Incentives

SaaS Subscription Model

[CLIENT]’s pricing is already enterprise-oriented, designed for multi-site rollouts under one agreement. Continue to refine tiered enterprise packages (based on total connected sites or devices) to simplify procurement.

The simpler the pricing model for enterprise, the less likely momentum is lost in the sales process.

Volume-Based Tiers

Customers and Partners benefit from defined volume-based pricing tiers, making it more cost-effective as they scale up their usage across multiple factories or devices.

Partner Margin Retention

Implementation partners retain the margin from deployment services, incentivizing high-quality execution and ongoing collaboration.

The more annual revenue partners bring in, the larger the discount provided, the greater the partner’s profit.

Recurring and Bonus Incentives

Partners earn a 15–25% recurring share for sourced or co-sold deals and receive a bonus and increased tier value for converting pilot projects into paid subscriptions.

Goals & KPIs

Analysis and recommendations

- Partner-sourced ARR goal reflects a strong emphasis on revenue from partnerships.
- Reducing CAC payback to under 6 months will improve capital efficiency.
- Expanding certified partners and case studies increases scale and credibility.
- Accelerating time-to-value and tripling the partner pipeline drives faster growth.

Category	KPI	2027 Target
Revenue	Partner-sourced ARR	≥ 40 %
Efficiency	CAC Payback	< 6 mo
Scale	Certified Partners	10 +
Credibility	Case Studies	10 +
Velocity	Time-to-Value	< 30 d
Engagement	Partner Pipeline	3× YoY

Operations

Effective tooling and governance drive successful partner programs.

CRM / PRM

Track corporate hierarchies and site deployments to maintain clear partner records and relationships.

Enablement Hub

Training and certification platform focused on empowering enterprise sales teams to succeed.

Kiflo (portal + deal reg) + *TalentLMS/Articulate* (training) + *Google Drive/Site, Notion, Coda* (content) + Slack (Communication) + Hubspot/SFDC (Analytics)
Total: ≈ $10–12 K / yr — live in 2–3 weeks, no developer needed.

Partner Dashboard

Monitor ARR and deployment metrics to measure partner performance and growth.

Governance

Quarterly Partner Council meetings and executive account reviews ensure program accountability.

Key Risks and Mitigation Strategies

Risk	Mitigation
Lack of case studies	3–5 references in 90 days
Partner dependency	Diversify by tier & region
Tooling delay	Launch MVP → iterate
Pricing confusion	Publish Partner Guide
Bandwidth constraint	Phase hiring, leverage advisors

Analysis and recommendations

- Prioritize gathering 3–5 case study references within 90 days to build credibility. Publish
- Diversify partners by tier and region to minimize dependency risks.
- Launch a minimum viable product (MVP) to address tooling delays and iterate based on feedback.
- Publish a Partner Guide to reduce pricing confusion and align expectations.

Readiness

Funding Proof Points & KPI Targets

Growth & ARR YoY

KPI: ARR YoY. Target: > 100%. Demonstrates [CLIENT]'s ability to deliver high annual recurring revenue growth, a key indicator for investors.

Distribution & Partner ARR

KPI: Partner-sourced ARR. Target: ≥ 40%. Focus on driving substantial revenue through partners, validating the effectiveness of [CLIENT]'s distribution strategy.

Efficiency & CAC Payback

KPI: CAC Payback. Target: < 6 months. Highlights operational efficiency by ensuring customer acquisition costs are recovered quickly, supporting sustainable scaling.

Enterprise Credibility & Discipline

KPI: Enterprise Case Studies (≥ 10 published) and Quarterly KPI Reviews (100% on-time). Proves [CLIENT]'s credibility and operational rigor to support enterprise clients. Primary Readiness Target: Q4 2026 with buffer into early 2027.

Action Plan

Next Steps: Immediate Priorities (Q1 2026)

01

Partner Tiers & Incentives

Finalize partner tiers and incentives to drive engagement and motivate high performance among partners.

02

Enablement Hub Launch

Launch Enablement Hub v1 to provide resources, training, and support for partners and internal teams.

03

Customer Case Studies

Develop 3–5 customer case studies to showcase successful implementations and build credibility with prospects.

04

Align Co-Sell Workflows

Align Cloud and SI co-sell workflows to streamline collaboration and maximize joint opportunities.

05

Publish GTM KPI Baseline

Publish GTM KPI baseline to establish benchmarks and measure the effectiveness of go-to-market activities.

Milestones

Milestone Timeline: Key Outcomes Through Series A

Q1 2026

Immediate Priorities

Finalize pricing & partner tiers, launch Partner Hub, develop ROI toolkit, align co-sell workflows, set Series A KPI baseline.

Improve digital presence.
On-page SEO improvements
Video content for LinkedIn

Q2 2026

Enterprise Contracts Closed

2 enterprise-wide contracts closed + ROI data in progress.

Q3 2026

Partner Pipeline & Cases

≥ 40% partner-sourced pipeline + 3 case studies published.

Q4 2026

Funding Metrics Validated

ARR > 2×, CAC < 6 mo; metrics validated for funding readiness.

Q1 2027

Series A Raise Window

Optional raise window for Series A based on deal closure velocity.

Discussion

Turn Internal Builds into [CLIENT] Installs

DIY install as core operating layer offered at low cost and self-serve.

Let the product do the selling

DIY Risk	Manufacturers' biggest risk = failed DIY IIoT projects.
Low cost "hook"	[CLIENT] offers a **low cost edge edition** that accelerates DIY success and embeds [CLIENT] as the core operating layer. The "seed" into the innovation or smart factory team utilizing a small discretionary budget
Upsell to Enterprise features	As complexity grows, and engineers encounter challenges, [CLIENT] upsells enterprise features, multi-site orchestration, AI, and governance. Converts "DIY" projects into corporate [CLIENT] deployments.

Single “land & expand usually breaks

Root cause	What actually happens
Wrong buyer	Plant engineers love the tool, but the enterprise budget sits with Operations, IT, or Transformation at HQ. Local managers can’t commit multi-site spend.
No executive sponsor	Corporate never feels the pain or sees the ROI, so expansion funding disappears the next fiscal year.
Disconnected data	One-site deployments don’t create cross-site insights → no proof of enterprise value.
Support fatigue	Vendor ends up hand-holding each plant individually; margins vanish.
Procurement reset	When corporate IT finally notices, they re-evaluate vendors and often rip out the pilot.

Case Studies

Company	Market	Outcome	Relevance to [CLIENT]
Grafana Labs	Industrial monitoring	$350 M ARR	Proved engineer-first, open-core funnel works at scale.
Ignition	SCADA / MES	Global adoption	Low per-site license became **default** for DIY engineers.
Kepware (PTC)	Connectivity middleware	Acquired by PTC for $100 M	Paid “lite” tier seeded enterprise uptake.
Datadog / MongoDB	Cloud infrastructure	$1 B+ ARR each	Land-and-expand via low-cost entry.
Ubidots	IoT SaaS	Niche success	Validates paid PoC for hardware-adjacent SaaS.

How Could it Work When Land and Expand Doesn’t Work?

Element	Description
Target Buyer	Corporate building a DIY solution, not interested in full enterprise third party rollout
Product Package	Core connectors, lightweight dashboard, limited data volume, 1 site or XX production lines
Price Point	Based on data usage, have to upgrade to enterprise to fully connect & engage all features.
Distribution	Direct via website (additional lead source for immediate upsell or partner co-sell, SI partners, and referrals) Partner/CEO led
Support	Community documentation + optional paid partner services
Conversion Trigger	(conversation with product) Connect additional sources, multi-license, multi-plant rollout, corporate compliance, analytics upgrades

This is not “Land and Expand”, this is a manufacturer-wide wedge inserted into their home-built system.

APPENDIX

Implementation

[CLIENT] Partner Hub: V1 - MVP

01

Partner Onboarding

Basic registration, company profile, contact, NDA, and tier assignment set up using Google Form + CRM integration or Notion/HubSpot.

02

Training & Certification

Short self-guided enablement course or webinar series on [CLIENT]'s value prop, platform overview, and deployment basics. Delivered via recorded sessions + quizzes (Loom + Typeform or simple LMS plugin).

03

Sales Resources

Enterprise ROI deck, demo scripts, case study PDFs, and objection handling sheets organized in a Google Drive folder or Notion database.

04

Deal Registration Tracker

Partners log opportunities and request [CLIENT] support using a shared CRM pipeline (HubSpot / Airtable view).

05

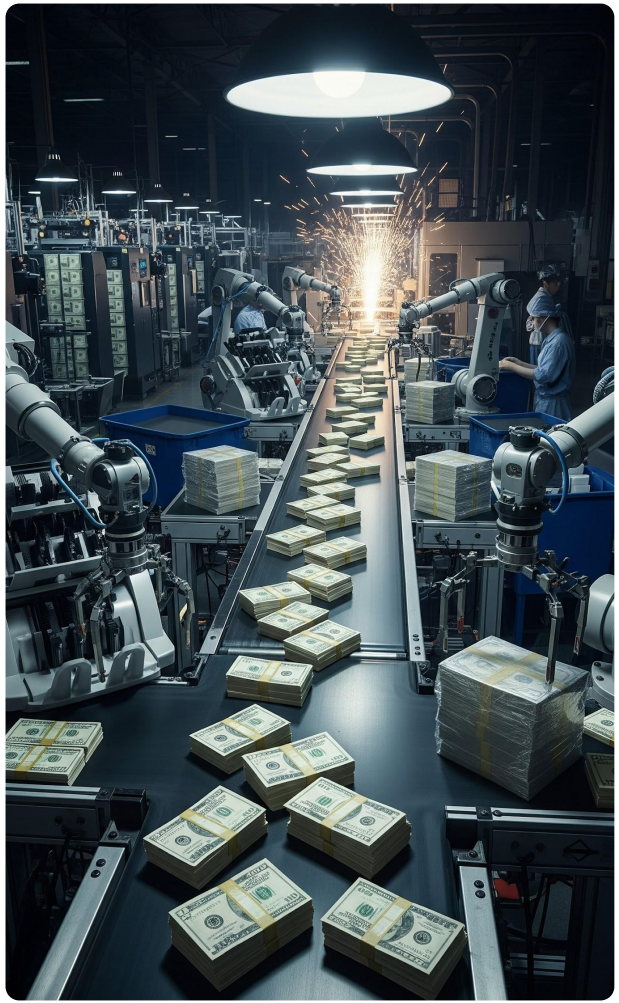
KPI Dashboard & Feedback

[CLIENT] tracks partner-sourced ARR, activity, conversion with Google Data Studio / Looker Studio dashboards. Q&A and partner community support via Slack channel or Discord workspace.

[CLIENT] ‘26–’27 GTM Strategy

Scaling an AI-Driven Industrial Operations Platform into Predictable Growth

October 29, 2025



Overview

Executive Summary

- **Market Opportunity:** $310B Intelligent Manufacturing / IIoT market growing at 13.2% CAGR (2026–2027).
- **Strategic Goal:** Scale [CLIENT] from validation to predictable ARR growth and profitability readiness.
- **Top GTM Priorities:** (1) Scale Through Partners (2) Verticalize to Specialize (3) Pricing Optimization (4) Institutionalize RevOps.
- **Critical Success Factors:** Cross-functional alignment, partner certification velocity, ROI proof, pricing discipline.

Disclaimer: ARR and partner network status inferred from public sources; [CLIENT]'s actual numbers may differ.

Market Analysis – Intelligent Manufacturing Outlook (2026–2027)

01	**Market Size & Growth**	$310B projected by 2027, driven by AI-based optimization and IoT integration.
02	**Key Segments**	Automotive, Industrial Equipment, Electronics Assembly, and CPG/Food Manufacturing are leading segments.
03	**Market Drivers**	ESG mandates, AI/ML adoption, OT-IT data unification, and reshoring supply chains are fueling growth.
04	**Barriers to Entry**	Vendor lock-in, integration costs, and data security regulations pose significant challenges.
05	**Assumptions & Data**	Segment shares are inferred from partner announcements and industry benchmarks. Disclaimer: Certain data points and assumptions are inferred from public information.

Competitive Landscape (2026 Snapshot)

Key Competitors

Main competitors include Siemens Industrial Edge, Rockwell FactoryTalk, Claroty, Uptake, AWS IoT, and [CLIENT].

Data based on estimates where not publicly available.

[CLIENT] Differentiation

[CLIENT] stands out with an AI-native SaaS architecture, a partner-first go-to-market approach, faster ROI, and lower total cost of ownership (TCO).

Market Share & Growth Potential

[CLIENT]'s estimated market share is less than 1%, indicating significant room for growth from a low starting base.

Pricing Benchmark & Disclaimer

Competitors use hybrid license/subscription models. [CLIENT] is evaluating optimized SaaS pricing.

Certain data points are inferred from public information; see final slide for details.

Market Analysis

Porter’s Five Forces – 2026 Assessment

Threat of New Entrants

Score: 2. Capital intensity and domain expertise create significant barriers for new players, limiting the entry of new competitors into the market.

Supplier Power

Score: 3. Companies are dependent on cloud infrastructure and operational technology (OT) hardware vendors, giving suppliers moderate influence over the industry.

Buyer Power

Score: 4. Enterprises demand proof of ROI and interoperability, increasing their bargaining power and influencing industry standards and offerings.

Threat of Substitutes

Score: 3. Point solutions such as MES and analytics platforms continue to persist, providing alternatives and maintaining moderate substitution risk.

Competitive Rivalry

Score: 4. Intense competition exists among major ecosystems like Siemens, AWS, and [CLIENT], driving innovation and aggressive market strategies.

Analysis

SWOT Analysis – [CLIENT] 2026–2027

Strengths

AI-native platform; Partner-first model; Fast deployment (30 days); Proven OEE gains. These strengths support [CLIENT]'s competitive edge in the industrial AI space.

Weaknesses

Limited brand recognition; Small sales force; Partner dependence; Pricing optimization ongoing. These areas require attention to sustain growth and market presence.

Opportunities

Industrial AI demand; ESG mandates; Global partner expansion; Data monetization potential. The market is evolving, presenting [CLIENT] with significant growth avenues.

Threats

AI regulation; Vendor consolidation; Cybersecurity standards; Manufacturing capex slowdowns. External risks could impact [CLIENT]'s trajectory and require proactive management.

Strategic GTM Recommendations (2026–2027)

A Two Pronged approach: Partners & Enterprise sales

Scale Through Partners

Expand the partner ecosystem, targeting 10 partners by 2027 to extend market reach and leverage joint capabilities.

Verticalize to Specialize

Launch go-to-market playbooks tailored for Automotive, Electronics, and CPG industries to address unique vertical needs.

Pricing Optimization

Evaluate tiered SaaS pricing and explore value-based models as part of the 2026 commercial design to maximize revenue.

Institutionalize RevOps

Align revenue data, forecasting, and KPI cadence across all teams to drive consistent, data-driven decision-making.

Assumptions & Context

Some partnerships and pricing models may already exist; this plan builds on and scales proven motions. Data points are inferred from public information.

Roadmap

Implementation Roadmap (2026–2027)

01

Foundation (Q1 2026)

Finalize RevOps and confirm 2–3 certified partners to establish a strong operational base for future growth.

- RevOps finalized
- 2–3 certified partners confirmed

02

Acceleration (Q2–Q3 2026)

Launch vertical playbooks and execute 5–8 enterprise pilots to drive early market traction and validate offerings.

- Vertical playbooks launched
- 5–8 enterprise pilots executed

03

Expansion (Q4 2026–Q2 2027)

Grow to 10+ partners and expand into EMEA/APAC regions with support from Tech Mahindra.

- 10+ partners onboarded
- EMEA/APAC expansion via Tech Mahindra

04

Optimization (Q3–Q4 2027)

Target $15–20M ARR and achieve less than 6-month CAC payback, optimizing for revenue and efficiency.

- $15–20M ARR targeted
- <6-month CAC payback achieved

Phase 1 Leadership Alignment – Head of GTM Strategy (2026–2027 Launch Cycle)

01

Leadership Foundation

Objective: Build leadership foundation for scalable GTM execution. Role Start Date: December 1, 2025. Reports to CEO and leads a 6–8 person GTM team.

- Leadership team structure
- Defined reporting lines
- Role kickoff plan

02

Scale Commercialization

Purpose: Scale and optimize [CLIENT]'s commercialization model by focusing on partner expansion, pricing rollout, and operational discipline.

- Commercialization roadmap
- Partner expansion strategy
- Pricing rollout plan

03

Operational Discipline

Focus: Implement operational discipline within the GTM team across Sales, Partner, Marketing, and RevOps to support growth and execution.

- Operational best practices
- Performance metrics
- Team accountability framework

Risk Analysis

Risks & Dependencies

Strategic Risks

Market adoption may vary by vertical. Heavy reliance on SIs (Tech Mahindra, CoffeeTree) could impact growth. Pricing model may not align with buyers. Large incumbents accelerating AI could compress differentiation.

Operational Risks

GTM team ramp-up (6–8 hires) depends on leadership onboarding in Dec 2025. Data standardization is a bottleneck. Scaling assumes continued capital for GTM & partner enablement.

Key Dependencies

Strong partnerships with Tech Mahindra & CoffeeTree for scaling. Product-GTM alignment via KPI dashboards. Timely launch of [CLIENT] GTM Playbook v2 & pricing redesign by early 2026.

Potential Risk-Mitigation Adjustments

Market Adoption Risk: Vertical Proof + ROI Library

Accelerate creation of a Customer Outcome Library with documented case studies showing measurable ROI by vertical (Automotive, Electronics, CPG). Assign a Value Engineering Lead in Q2 2026 to own ROI quantification.

Partner Dependency Risk: Diversify & Tier Model

Move from 2 global anchors to a tiered partner ecosystem: global SIs, regional OT integrators, and channel resellers. Launch Partner Certification Program v1 by end of Q2 2026 with incentives and KPIs.

Pricing Model Maturity: Tiered SaaS Before Value-Based

De-risk pricing by phasing: implement tiered SaaS pricing in 2026, pilot value-based pricing in 2027 with reference customers. Create a cross-functional Pricing Council by Q3 2026.

Talent & Capacity Risk: Staggered Hiring & Leadership Ramp

Advance GTM leadership onboarding by 60–90 days (target Nov 2025) to set up the hiring pipeline pre-ramp. Use interim fractional GTM advisors to bridge Q4 2025 capacity.

Funding Cycle Risk: Partner Co-Investment & Milestones

Negotiate co-investment arrangements with anchor partners, linking enablement funds to KPI milestones. Integrate co-funding line items into 2026 partnership renewal agreements.

Data Integration Complexity: Pre-Integration Templates

Develop industry-specific data ingestion blueprints for Auto, Electronics, and CPG, pre-built for common PLCs and MES systems. Assign Product–GTM task force in Q2 2026 to standardize connectors.

Role Overview

Head of GTM Strategy & Execution – Role Overview

- Own end-to-end GTM strategy and revenue execution across channels.
- Drive ARR growth via partner enablement, verticalization, and pricing innovation.
- Integrate marketing, sales, and product under unified growth motion.
- Establish KPI accountability (ARR, CAC, TTV, Partner Revenue).

Assumptions, Sources & Methodology

- ARR: Estimated $1–5M based on public milestones; actual figure undisclosed.
- Partner Network: Confirmed partners include Tech Mahindra and CoffeeTree; other smaller partners inferred.
- Pricing Model: [CLIENT]’s materials reference subscription licensing; value-based pricing not confirmed.
- Geography: Primarily U.S. operations; regional presence via partners assumed.
- Customer Base: Multi-site readiness claimed; customer count unknown.