

DATA SHEET | CAPTAIN ESSENTIALS

Can One Spreadsheet Change Your Number?

Your partners already know your customers. Do your sellers?

Every territory has accounts where a hyperscaler, a systems integrator or a platform partner is already inside. That relationship can open the door to the economic buyer, shorten a cycle or revive a stalled deal. Most sellers never see it, because it sits in someone else's spreadsheet.

Put partner relationships next to every seller's accounts and pipeline, before the next forecast call.

1 list

from each partner: the web domains of the customers they work with.

0 integrations

No connectors or partner portal. Data comes in by file import.

1 view

per seller and manager, account by account, partner by partner.

Manager	Rep.	Partner focus	Industry	Pipeline only										
Nadia Nakamura	Maya Whitfield	All	All	No										
Accounts in view	Matched to an external partner	External match rate	Open opps	Open pipeline	External-partner pipeline	External-partner share								
400	300	75%	282	\$48.7M	\$42.9M	88%								
Account	Domain	Open opps	Pipeline ACV	Services	Ext. partners	Salesforce	AWS	Google Cloud	Microsoft	Adobe	Deloitte	Accenture		
Calhaven Manufacturing	calhavenmanufacturing.co	5	\$1,132,000	\$219,000	1	Active								
Wesridge Foods	wesridgefoods.net	5	\$922,000	\$330,000	4	Customer		Past	Active	Active				
Pelridge Dining	pelridgedining.com	4	\$838,000	\$218,000	2	Past	Customer							
Fenwater Capital	fenwatercapital.com	3	\$836,000	\$265,000	1				Customer					
Dorgate Partners	dorgatepartners.com	4	\$799,000	\$339,000	3				Customer		Customer	Listed		
Galridge Media	galridgemedia.com	4	\$780,000	\$261,000	2		Active						Customer	
Pelfield Bank	pelfieldbank.net	4	\$733,000	\$289,000	2		Customer			Active				
Larklake Partners	larklakepartners.com	3	\$733,000	\$130,000	0									

Each seller sees their accounts and open pipeline, with every partner's presence in its own column. Shown with synthetic data.

CAPTAIN Essentials is a standard Google Sheets workbook from AllianceMind. You import a Salesforce account report and partner domain lists; matching, dashboards and seller views then recalculate automatically. Source data is refreshed by importing updated files. There is no live connection to Salesforce or partner systems.

How it works

01

Start with two partners

Willing to share their customer domains. Relationship and industry help, but are optional.

02

Import one Salesforce report

Account, website, owner, manager and region, exported as a file. Pipeline is optional.

03

Every seller sees the overlap

After each import, matching, dashboards, shortlist, campaign view and charts recalculate automatically.

EXAMPLE

Before her forecast call, Maya Whitfield picks her name on the Dashboard. Her largest account, Calhaven Manufacturing, has \$1.1M open across five deals, and Salesforce is marked Active there. One click emails Salesforce's contact for her region. Synthetic data.

What changes on Monday morning

Sellers know who to call

Every partner column shows the partner's contact for the seller's region and your own alliance manager, one click from an email.

The right accounts come first

A co-sell shortlist ranks accounts with open pipeline and an active partner, and flags accounts where a partner is engaged but no deal exists yet.

Campaigns start with the strongest partner

Pick a sub-industry and see which partner is present in the most accounts. Plan the event or joint campaign around real overlap.

QBRs come with evidence

Ready-made charts show partner coverage and the pipeline sitting on partner-matched accounts for any territory.

Industry	Sub-industry	Accounts	Salesforce	AWS	Google Cloud	Microsoft	Adobe	Deloitte
Retail	Apparel and Footwear	222	97	69	50	83	45	40
Retail	Grocery and Convenience	205	108	68	56	62	32	27
Retail	Department and Specialty Stores	212	92	55	64	76	31	32
Retail	Home Improvement	231	104	77	55	73	39	27

Campaign planning by sub-industry: darker cells show where a partner overlaps with more of your accounts. Synthetic data.

Built for low friction

- **A focused ask for partners.** Customer domains only: no revenue, contract values or customer contacts. Each partner decides what it can share under its own policies.
- **No historical revenue needed** from your side, and no integration project.
- **Your data stays in your Google Drive.** Nothing is sent to AllianceMind unless you choose to share it.
- **A one-hour setup session.** AllianceMind configures the workbook with your team in one hands-on hour. Your preparation is a clean Salesforce export and partner domain lists.
- **Refresh on your schedule.** Re-import updated files monthly or before planning cycles. There is no live sync.
- **Built to scale.** Designed for up to 10 partners and 20,000 accounts per workbook. Larger organizations run one workbook per region or segment.

A match is not a verified relationship. It means the account's domain is on a partner's list, with the status the partner reported: presence, not proof of influence. Sellers confirm with the partner first. CAPTAIN, AllianceMind's reasoning engine, goes further: it weighs the evidence and recommends the next move. The seller decides.

See what your partners could do for your number

Start with a one-hour demonstration of CAPTAIN Essentials. We'll show you how the workbook identifies partner overlap, highlights opportunities in your pipeline, and gives sellers and managers a practical way to act on that information.

Ready to put it to work?

AllianceMind offers a fixed-scope implementation using your Salesforce account export and partner customer lists. We configure the standard workbook, validate the matching process with your team, train your users, and deliver a working solution in your own Google Drive environment.

No CRM integration. No lengthy implementation project. Just practical partner intelligence your sellers can use.

- **Book a demonstration:** calendly.com/jodyschiavo
- **AllianceMind.net**