

# Partner Attribution Logic — Cheat Sheet

BlueThread Connect · Print this page and share with your AEs so everyone agrees on what counts.

Tier	Reporting Category	Definition	Qualification Rules	Example
<b>PARTNER SOURCED</b>	Commit Pipeline	Deal originates from a partner referral, PRM submission, or co-branded lead form.	Lead Source = 'Partner' No prior direct outbound on the account within 60 days Referral logged before first AE touch	Partner submits lead via Crossbeam/Reveal → AE receives intro → Deal created with Lead Source = Partner
<b>CO-SELL</b>	High-Confidence Pipeline	Partner is actively involved in progressing the deal with 2+ documented activities during Discovery or Validation.	2+ logged activities (Joint Demo, Partner Sync, Executive Intro) Activities during Discovery or Validation stages All activities logged within 48 hours of occurring	Partner joins a demo, then provides an exec intro to the buyer's VP → 2 activities logged → Auto-tagged Co-Sell
<b>PARTNER INFLUENCED</b>	QBR / Trailing Indicator	Partner contributed 1 supporting activity that helped progress the deal or retain the customer.	1+ logged activity (Procurement Advocacy, Channel Support, etc.) Activity supports deal progression, not admin Activity logged before deal advances to next stage	Partner's SE answers a technical question during evaluation → 1 activity logged → Tagged as Influenced

## What Does NOT Count

- ✗ **Retroactive tagging** — Adding a partner after the deal is Closed Won. If it wasn't logged before close, it doesn't count.
- ✗ **Admin-only activities** — Sending a contract, scheduling a meeting, or updating a CRM field is not partner involvement.
- ✗ **Self-reported influence** — An AE saying 'the partner helped' without a logged activity is not evidence.
- ✗ **Post-sale attribution** — Unless the deal is formally re-created in CRM for system reasons, no post-close tagging.

## The 48-Hour Rule

All partner activities must be logged in the CRM within **48 hours** of occurring. This is the single most important rule for maintaining CRO trust. Without it, AEs can retroactively tag partners on deals they were already winning — destroying data integrity and forecast accuracy.