

Manage Your Business and Optimize Cisco Rebates From a Single Pane of Glass



Drive profitability with easy-to-understand analytics and business insights

Staying abreast of Cisco incentives and promotions is a daunting task for program and finance managers. You need to stay current on up-front discounts and back-end rebate programs as well as programs based on employee levels of certification and specialization. Partners use time-consuming manual processes to piece together ever-changing qualification and compliance criteria from complicated data sources and vendor systems. Noncompliance can impact your profitability significantly. For large companies, the impact can be in the millions of dollars.

Not only are programs complex, but so are deals and the management of client assets and contracts. The relevant information is so cumbersome and time consuming to gather and analyze that it is difficult to focus on managing the business and taking the needed actions instead of grinding through data.

Netformx ChannelXpert accelerates profits

Netformx ChannelXpert® enables Cisco partners to drive profitability by simplifying business management and maximizing Cisco partner program rebates and incentives. ChannelXpert provides a holistic view and portal into your business and insights on how to optimize that business—all on a single pane of glass.

ChannelXpert automatically presents actionable insights to potential situations (such as missed booking targets, expired certifications, or overdue contract renewals) that could impact profitability and provides drill-down to the details. You can then quickly make informed decisions to increase revenue and margin.

ChannelXpert automatically collects, aggregates, and correlates data from many Cisco tools and combines it with distributor purchase data. Through sophisticated analytics ChannelXpert turns that mass of data into business insights that neutralize risk, ensure compliance, and optimize profitability.



Identify Opportunities & Take Action

“Netformx ChannelXpert has enabled us to quickly identify actions that allows us to optimize our partner rebates and rewards. We are gaining more business insights with less effort and can focus on the areas with the most impact on profitability.”

- Simon Fenning, GM BT Group Procurement & Cisco COE, British Telecom

Netformx ChannelXpert enables you to cut through the noise and complexity to manage key success criteria:

Business Management

- **Make timely and effective business decisions** with insightful information and analysis
- **Manage your Cisco business** and maintain profitability as their strategy and programs evolve
- **Tighten relationships** with your suppliers and distributors
- **Monitor your business performance** and health with easy access to your data
- **Get world-class Netformx consulting** to better understand your situation

Profitability

- **Accelerate profits** and increase program participation with automated partner and incentive program management
- **Improve profitability and margins** by focusing on actionable analysis and insights, not manual data grinding

Efficiency

- **Quickly optimize, analyze, and track rewards**, including areas you didn't have time to manage before
- **Maintain program compliance** and drive sales behavior with standard processes
- **Mitigate the risk of lost rebates** with real-time monitoring, automated analysis, and time-sensitive alerts
- **Save time and be efficient** as you manage your business

ChannelXpert provides financial benefits not only in the post-sale stage, but also for pre-sales and renewal management. Renewal management features help you stay on top of service, subscriptions and maintenance contracts and to uncover new opportunities for refresh and upgrades for up to 5 customers. There is an upgrade option to cover all your customers.

Manage your business and maximize partner program rebates and incentives

The ChannelXpert dashboard is your business intelligence portal. It provides transparency on a single screen so you can see at a glance the status of your

- VIP, CSPP, Cloud, and GIP rebates
- Opportunities such as expiring customer contracts and subscriptions, assets at EOX
- Deal registrations and leads
- Partner status and purchases

CHANNELXPERT: YOUR BUSINESS INTELLIGENCE PORTAL

The screenshot shows a comprehensive dashboard with various data points and charts. Navigation boxes on the left and right indicate key areas: VIP, Cloud, Refresh, Renewal, Certs, CSPP, GIP, Deal, Partner+, and Purchase. The dashboard includes sections for Business Notifications, Rebate, Opportunity, Community, and Program Management.

Category	Item	Value	Value	Value	Value	Value	Value	Value	
Rebate	Booking target	\$50.3M	\$12.2M	\$5.0M	\$180.5M	\$293.7k	\$474.2k	\$86.6k	\$17.0k
	Total eligible bookings	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	0	
Opportunity	Eligible bookings	\$10.3M	2%	\$206.2k	\$0.0	\$206.2k			
	Projected Rebate (VIP Period)	\$0.0	N/A	\$-10.6M	N/A	N/A	0	0	
Community	Overdue items	39,435	64	50	\$141.1M	15			
	Total client assets	\$178.9M	65%	\$54.9M	\$0.0	\$124.0M	\$54.1M	\$852.1k	
Program Management	Partner Status	GOLD	185	4	0	0	2		
	Purchase to date	\$16.8M	\$2.4M	\$14.3M	\$1.9M	9	\$0.0		

Track and grow your VIP rebates

ChannelXpert ensures all Value Incentive Program (VIP) rebate-eligible deals are accounted for and highlights any issues that should be addressed to maximize rebate payment. You can quickly view your rebate status (booking target, shipped rebates, etc.) and risks (to-be-shipped rebates, potential additional rebate, recoverable rebate), get details on potential challenges, and then take action to increase profitability. Dashboard reports also enable you to analyze your discounts in a variety of ways.

Manage contracts, subscriptions, and maintenance

View your Cisco Services Partner Program (CSPP) bookings, projected rebates, and recoverable orders. And identify asset contracts approaching end-of-life or expiration, the value of Cisco SmartNet® contracts expiring, and software subscriptions approaching renewal. With ChannelXpert the data are already analyzed and presented to you for action.

Grow your revenues

Quickly view a summary of your Cisco Commerce Workspace (CCW) deal status, such as won deals, expiring, open, and lost deals, as well as deals with or without promotions included. That way you can recover opportunities that might otherwise be lost. By tracking each opportunity, you can increase successful program participation and eliminate disqualifications or reduced incentives. Behavioral enforcement is also simplified with drilldowns to see each sales representative's actual registration and eligibility status.

ChannelXpert will automatically analyze each line item of your Bill of Materials (BOMs) for opportunities to replace assets nearing EOX, for rebates that have been missed, and for alternate SKUs that would yield better program participation.

Refresh opportunities

See a summary of client assets, assets confirmed in use, replacement opportunities, and converted sales revenue. Also see the value of expiring, expired, or obsolete SKUs. You can define criteria for drilling down, such as EOX milestone and date, then identify migration opportunities and generate quotes.

Manage direct and disti purchases

ChannelXpert presents Cisco and distributor purchasing data so you can track your purchases by source and optimize future purchases to maximize incentives and profitability. You can also see purchase details at a glance, such as by SKU, by client, or by dollar amount.

Your certifications and specializations

ChannelXpert tracks certification and program compliance at company, program, and individual levels. It highlights your Cisco partner status, specialization and certification risks as well as CSAT customer satisfaction stats. This streamlines a laborious manual process and greatly reduces the possibility of missed incentives due to ineligibility or non-compliance and enables you to act early and quickly to any identified risks.

Payment audit

See what has been paid or is still outstanding, by VIP period, so you can review payout trends. You can also view total payments by quarter or year for the top 5 Cisco programs, enabling you to quickly understand where the best opportunities reside and ensure you are being paid.



Accurate VIP Calculations

"ChannelXpert has significantly simplified our entire Cisco operation. Instead of logging into 5 separate Cisco systems or manipulating homemade spreadsheets, we get the up-to-date, accurate results we need in minutes. It is so easy to determine where we stand that we now use ChannelXpert to generate precise VIP calculations on most deals instead of just the major ones. ChannelXpert saves us so much time and just plain makes life easier."

Niraen Mathias, Sales Operations Manager,
Thomas Duryea Logicalis

ChannelXpert delivers immediate value

Optimized process and claiming rebates

A partner was dealing with an activation and reporting challenge. ChannelXpert was able to highlight \$15,000 of activation rebates that were not being claimed. Moreover, they were able to see the customer and associated deals, so they optimized the process by providing reports to the field team to ensure activation and reporting as part of the installation process.

Recovering dollars

After finding \$94,000 in potential add in ChannelXpert, a partner was able to recover the \$94,000 by opening a case with Cisco that the order was shipped to the Partner for staging and then delivered to the customer.

ChannelXpert and DesignXpert

Since SKUs eligible for Cisco rebates change frequently, ChannelXpert can automatically present alternate, more profitable SKUs early in the pre-sale design stage in **Netformx DesignXpert®**. So, you can readily take advantage of partner promotions and incentives while eliminating design rework.



Find Promotions Early in the Solution Design Phase

"The integration of vendor incentive promotions and programs into DesignXpert is enabling us to select alternate parts that meet our customers' needs while at the same time increasing our potential profit margins. This has also increased our productivity since we can consider manufacturer promotions during the design phase rather than off-line after the order has been created."

Tom Christian, Networking Presales Engineer,
Sirius Computer Solutions

To get started today, talk to your Netformx Account Manager or contact sales@netformx.com.

About Netformx

Netformx enables partners to design and deliver multi-vendor IT solutions quickly and effectively. It helps the Cisco channel increase revenues and create an improved buying experience for their customers. Developed in close collaboration with Cisco, the Netformx application suite streamlines the sales lifecycle for pre-sales, post-sales, and subscription and renewal management. It grows profit margins by optimizing use of Cisco incentives, promotions, discounts, and rebates. Automation and powerful analytics provide business intelligence and actionable insights that enable partners to eliminate manual work, improve efficiency, collaborate, and achieve better business outcomes and customer success. Netformx has 2,000+ customers globally including ALE, AT&T, Bell Canada, BT, Cisco, Dimension Data, Insight, Optus, and Telstra. Our multi-vendor KnowledgeBase™ contains client and vendor products, services, and program compliance data from vendors such as Cisco, ALE, Check Point, Juniper, and Riverbed. Netformx.com, Twitter and LinkedIn.

