

## Manage and grow your Cisco VIP rebates and LCI rewards



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

Staying abreast of Cisco incentives and promotions is a daunting task for business operations and finance managers, requiring time-consuming manual processes to piece together ever-changing qualification and compliance criteria. Cisco's Value Incentive Program (VIP) and Lifecycle Incentive (LCI) rewards are particularly complex and require ongoing management over many months to meet program requirements. Noncompliance can impact your profitability significantly. For large companies, it can cost millions of dollars.

Cisco has made improvements to reduce the number of portals you need to visit to access your Cisco orders. But the systems are designed for users to look up single orders. They don't provide aggregated data or reports. So, to list, for example, your top ten deals you need to find and download each order, and then manually create and sort your list. And, since Cisco just provides direct sales data, you are probably missing the cost information you need for deals made through distribution.

Spending time finding and processing data is time you don't have to manage the business and take the needed actions to maximize your payouts.

## Netformx ChannelXpert accelerates profits

Netformx ChannelXpert enables Cisco partners to drive profitability by simplifying business management and maximizing Cisco partner program VIP rebates and LCI rewards. ChannelXpert is a 360° view into your business that provides insights and reports to help you manage and optimize that business—all in a single application.

With Netformx ChannelXpert you can

- Cut through program and deal noise and complexity
- Focus on priorities and optimize profitability
- Quickly analyze and track rewards
- Click for deeper visibility into details
- See at a glance potential reward opportunities and when activities are due
- Stay on top of contract renewals and VIP annuity payouts
- Ensure requirements and certification compliance



### Elevating LCI rewards to 5% of Cisco spend

*"Using Netformx automation Veytec had 5% of our annual spend with Cisco returned in Lifecycle Incentive dollars. On top of that, we saved valuable resource time. The ROI on Netformx tools is real and significant."*

Pat Henson, VP of Operations,  
Veytec

ChannelXpert automatically

- Collects, aggregates, and correlates the latest data from various Cisco portals
- Adds distributor actual or estimated purchase costs and customer data
- Turns that mass of data into timely, actionable insights
- Evolves in-step with Cisco program requirements

ChannelXpert focuses on simplifying the management of two complex Cisco programs: Lifecycle Incentive (LCI) and Value Incentive Program (VIP).

# Manage and grow Lifecycle Incentive rewards

The Netformx LifecycleXpert dashboard in ChannelXpert helps Sales and Customer Experience teams to view the entire Lifecycle Incentive journey. LifecycleXpert can help increase profitability and enables a rapid ROI by maximizing LCI reward submission and collection—all on a single pane of glass.

With its automated analysis of comprehensive distributor and Cisco data, you can:

- Analyze and prioritize LCI opportunities
- Determine where to take action on plans and activities
- See what's needed to meet milestones and due dates
- Track payment status

## Insight, focus, and flexibility to prioritize LCI opportunities

LifecycleXpert automates the management of LCI reward requirements and deadlines for Use/Activate and Adopt phases. With a single click, LifecycleXpert gives you immediate visibility to eligible LCI opportunities shown by:

- Quarter
- LCI phase and track
- Potential rewards, calculated automatically

After registering your LCI opportunities in Cisco PXP, you can easily track and monitor the status of:

- Crucial milestones and due dates
- LCI activities
- Customer Success Plans (CSP)
- Successful Business Outcomes (SBO)
- Approved and expected payments



## Consolidated and actionable insights to manage LCI

*"It is easy to track our success with the program thanks to at-a-glance analysis, charting, and reporting of our historical and new opportunities. Netformx LifecycleXpert enables us to take a bird's eye view and to really manage our LCI program rather than getting lost in the details of data acquisition and analysis. That is a huge benefit to us."*

Deanna Davenport, Senior Director, Lifecycle Services, ConvergeOne

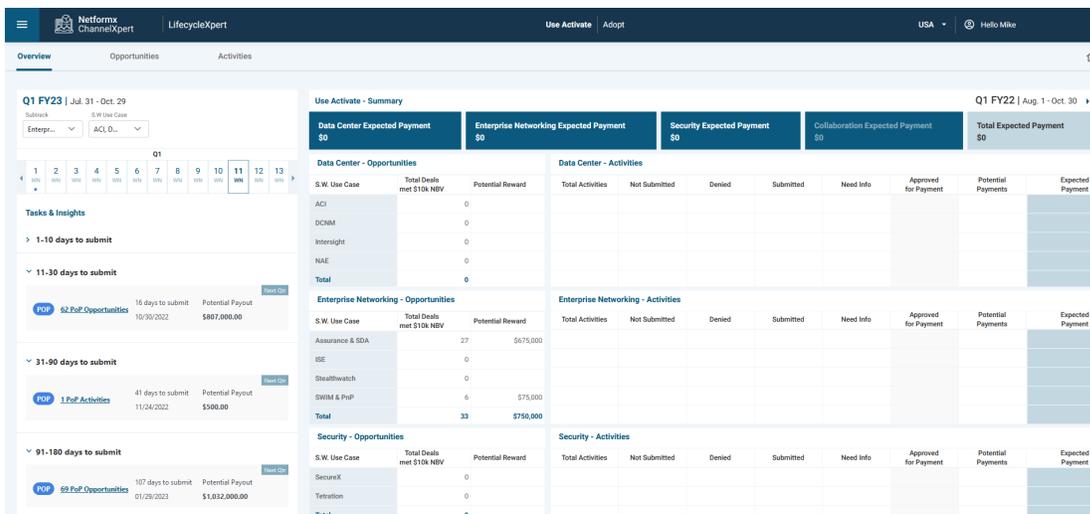
LifecycleXpert matches Deal ID to plans and activities so you can accurately track due dates based on the booked order date and correlate data between all systems.

For the Adopt phase, LifecycleXpert summarizes EA and non-EA opportunities, divided by subtracks. Included are:

- Their potential SBOs
- Activities for CSPs and SBOs
- CSP and SBO status and if approved by Cisco
- The expected reward

LifecycleXpert also provides the flexibility to look at actual or potential Use/Activate Opportunities. It shows the total deals by subtracks, such as data center and enterprise networks, and by software use case. This ensures that the lucrative LCI reward opportunities are identified and can be managed with pertinent information.

## THE LIFECYCLEXPERT USE/ACTIVATE DASHBOARD



## Stay on top of CSP and SBO requirements

Importantly, LifecycleXpert automatically provides all the information needed to monitor and manage CSPs and SBOs and fulfill the LCI program requirements. It does this by exposing all the required data and automating the correlation of Deal ID to purchase orders, plans, activities, and customer names. A timeline provides insights to current and upcoming due dates for your various opportunities.

With LifecycleXpert's automated insights you can prioritize your efforts to focus on those opportunities with

- The highest LCI reward payout potential
- The shortest actionable timeframe
- The services that are prime for delivering adoption



### VIP Dashboard zeroes in on rebate status

*"ChannelXpert VIP dashboard gives us visibility into timelines for critical Cisco VIP milestones, due dates, and events in a single place. This means we can quickly and accurately zero in on the rebate status and actions needed for the current and previous VIP periods, which is fantastic. We couldn't run our Cisco business as effectively and efficiently without ChannelXpert."*

Carmen Shelton, Director of Strategic Alliances,  
Technologent

## 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.

A unified view enables you to take a deep dive into your VIP opportunities. The status tables describe

- All essential Architecture & Annuity targets and breakdowns
- Actionable insights requiring immediate attention

- A visual tracking timeline of critical current and upcoming VIP milestones
- Details on the shipping status for current and previous VIP periods

You can 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 Cisco programs, enabling you to quickly understand where the best opportunities reside and ensure you are being paid.

## THE CHANNELXPERT VIP DASHBOARD

The screenshot displays the ChannelXpert VIP Dashboard interface. It features a navigation bar with 'Overview', 'Status Check', and 'Payments' tabs. The main content area is divided into sections for 'VIP-40' (July 31 - Jan 28) and 'VIP-38'. The 'VIP-38' section is further divided into 'Rebates status VIP-38 - Architecture' and 'Rebates Status VIP-38 - Annuity'. Each section contains a table with columns for Subtrack, Prerequisite Status, Booking Target Status, Missing Booking to Secure Rebate, Booking Target, VIP Eligible, VIP Eligible Shipped, Potential Rebate, and Expected Rebate. The 'Architecture' table shows a total expected rebate of \$9,410.00, while the 'Annuity' table shows a total expected rebate of \$111,651.99. Both tables include payment schedules and a 'Discrepancy Case (Disputes)' section.

# Drive profitability and efficiency with ChannelXpert

## Early visibility to annuity opportunities

Annuity reports and opportunities from the Cisco portals are typically not immediately available and sometimes don't provide all the needed details. ChannelXpert not only includes earlier visibility to Cisco and distributor data, but also provides up-to-date Annuity booking data. So, the Annuity opportunities listed are comprehensive and as up-to-date as possible.

## Partner status and purchases

ChannelXpert tracks partner status, certification, program compliance, and CSAT customer satisfaction stats. It 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.

Because ChannelXpert incorporates Cisco as well as distributor purchasing data you can track your purchases by source and optimize future purchases to maximize incentives and profitability.

### Recovering dollars

After finding a large potential add in ChannelXpert, a partner was able to recover \$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 delivers immediate value

ChannelXpert automatically analyzes masses of deal and program data and presents the results to you in a simple dashboard so you can take action.

To get started with ChannelXpert today, talk to your Netformx Account Manager or contact [sales@netformx.com](mailto:sales@netformx.com).

### 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.

## About Netformx, an Orchestra Group Company

Netformx cloud-based applications simplify how Cisco Partners can increase profitability from Lifecycle Incentives, VIP rebates, CSPP, and more throughout the pre to post sales cycle. We merge our deep expertise of Cisco programs with complete, consolidated, and digestible data from Distributors and numerous Cisco platforms to deliver the right data to the right people at the right time. Business outcomes are further enhanced with timely insights to manage customer success and renewals.

