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Architects of Change

## TD Logicalis leverages Netformx ChannelXpert to win more deals

IT solution providers are challenged daily by the complexity of IT technology sales. Additionally, those engaged with Cisco's products, price models, and incentive programs which are numerous and constantly changing, can experience extra complexity. Even with hours of research it is difficult to stay current on the latest deals and requirements. And the assigned Cisco Partner Account Manager may not be aware of the latest opportunities either.

### How Thomas Duryea Logicalis is using ChannelXpert

Staying on top of Cisco's frequent Value Incentive Program (VIP) program changes was an ongoing challenge for TD Logicalis. Multiple Cisco databases needed to be accessed and home-grown templates created. When a new VIP program began, team members had to upload all the new price lists. Sometimes SKUs were skipped, and it wasn't clear what was covered. The process was very time consuming and, as usual with any manual process, could be prone to errors.

The home-grown templates produced rough figures, but the team lacked confidence in the results. Only the largest quotes were processed using the templates, requiring manual entry of hundreds of lines from the quotes to align to the template rows and columns.

It was hard for them to stay on top of profit-impacting situations, such as expiring certifications or employee status changes, missed booking targets, or overdue contract renewals. Or to be sure every pricing, discount, and rebate scenario was taken into account so they could deliver a validated, competitive—and profitable—quote.

TD Logicalis were intrigued when they learned that Netformx ChannelXpert could automate the collection, aggregation, and correlation of data from many Cisco tools eliminating spending hours or days gathering and analyzing data from multiple sources. Through sophisticated analytics ChannelXpert also turns that mass of data into business insights that neutralize risk, ensure compliance, and optimize profitability.

To date, TD Logicalis Inside Sales Reps in Australia are using the ChannelXpert Bill of Materials (BOM) Analyzer to better manage their VIP rebates. Proactive rebate management with ChannelXpert has enabled them to win more deals and increase their Cisco rebates.

With ChannelXpert what used to take 40-50 minutes now just takes a couple of minutes. Initially they only ran very large deals through ChannelXpert, but because of the time savings and ChannelXpert's proven accuracy they now run all deals above \$100K through ChannelXpert.

By providing TD Logicalis users easy access to the data they need to maximize profitability, they can focus on business decisions and their customers instead of manually grinding through spreadsheets.

### Streamlining sales operations and ensuring consistent best practices

Early on, Niraen Mathias, Sales Operations Manager, saw the value that ChannelXpert could provide to the sales team and spearheaded the decision to buy it.

Niraen uses the ChannelXpert dashboard to get a quick view of his Cisco business and to understand where they stand against their Cisco targets. He has also found it valuable to identify certification risks, especially for teams outside of his location where it might take months to know people's certification and employment status.



*"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*

### **Gaining efficiency and accuracy we can trust**

With VIP 32 TD Logicalis began using ChannelXpert BOM Analyzer as part of their normal workflow. They upload estimates, get the rebate calculations, and see the potential earnings on a deal. This is very helpful for quoting the price. Since the company knows where its financials stand, it helps Finance approve the largest deals. They can document the process in their internal system to show they are ready to quote.



*"We have very high confidence in the accuracy of the ChannelXpert BOM Analyzer and know that the program requirements are being updated automatically. It is so easy to get a precise position on the rebates for a deal so we can make an informed*

*decision. And now we don't need to deal with complicated Cisco systems. Instead, we get result in just a few clicks. That is great. ChannelXpert is very helpful!"*

*Mitul Shah, Inside Sales Rep, Thomas Duryea Logicalis*

Mitul also reviews the ChannelXpert dashboard's VIP booking numbers and reports. The numbers are especially important to review near the end of the VIP period so he can see what actions need to be taken to achieve outstanding rebates. Prior to ChannelXpert, Cisco would provide some data, but the booking numbers were basically not being looked at.

### **Clarity on rebates to dial in pricing to win the deal**

When they get a CCW estimate or quote from Cisco or a distributor they put it through the ChannelXpert BOM Analyzer. This enables them to see the financial position of the whole deal and what they can use as a rebate to play with margin. ChannelXpert also

enables them to document the financials. Since it is so easy to use, James Willis, Inside Sales Rep uses it extensively on run-rate business.

In one case, a BOM came from Cisco where the customer wanted to see who could provide the cheapest solution. The accuracy of the BOM Analyzer was critical in providing the financial information needed to price the deal.



*"As an automated tool, ChannelXpert is much more accurate than our internal tool. You can*

*really trust the results. ChannelXpert is very fast and easy to use. So, we use it several times a week instead of manual spreadsheets a few times a year. Before, we would make educated guesses, so we applied a fudge factor to cover any errors. Now with ChannelXpert we know what the numbers are and can decide to take a lower margin to win a deal. Thanks to ChannelXpert's accurate analysis we've won multimillion-dollar deals where the competition was extremely tight."*

*James Willis, Inside Sales Rep, Thomas Duryea Logicalis*

### **Opportunities for additional value**

TD Logicalis has just begun using ChannelXpert and has seen financial payoff primarily through BOM Analyzer. They are now looking at some of Cisco's other programs such as CSPP that they haven't engaged with to date, due to lack of knowledge on how to leverage, and which will be simplified by using ChannelXpert. BOM Analyzer is just the tip of the iceberg on the benefits they can receive from ChannelXpert.

### **About Netformx**

Netformx helps Cisco Partners design and deliver multi-vendor IT solutions quickly and effectively, increase revenues, and create an improved buying experience for their customers. The Netformx application suite streamlines the entire sales lifecycle from pre-sale to renewal while optimizing use of Cisco incentives, promotions, discounts and rebates to grow profit margins. Powerful tools comprising business intelligence, actionable insights, collaboration and automation, coupled with close integration with Cisco, enable Partners to eliminate manual work, improve efficiency and achieve better business outcomes and customer success.

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