

# Netformx Applications Maximize Cisco Partner Profits

## Innovative solutions simplify IT sales complexity and increase partner profitability across the customer lifecycle

Netformx has a history of automating manual processes for Cisco Partners. By streamlining the journey, Netformx solutions enable partners to achieve better business outcomes and improved customer success. Our suite of Cloud-based applications eliminates manual work, countless spreadsheets, and broken processes. We apply automation, optimization, and analytics to simplify the pre-sales, post-sales, and subscription management lifecycle and to maximize partner profitability.

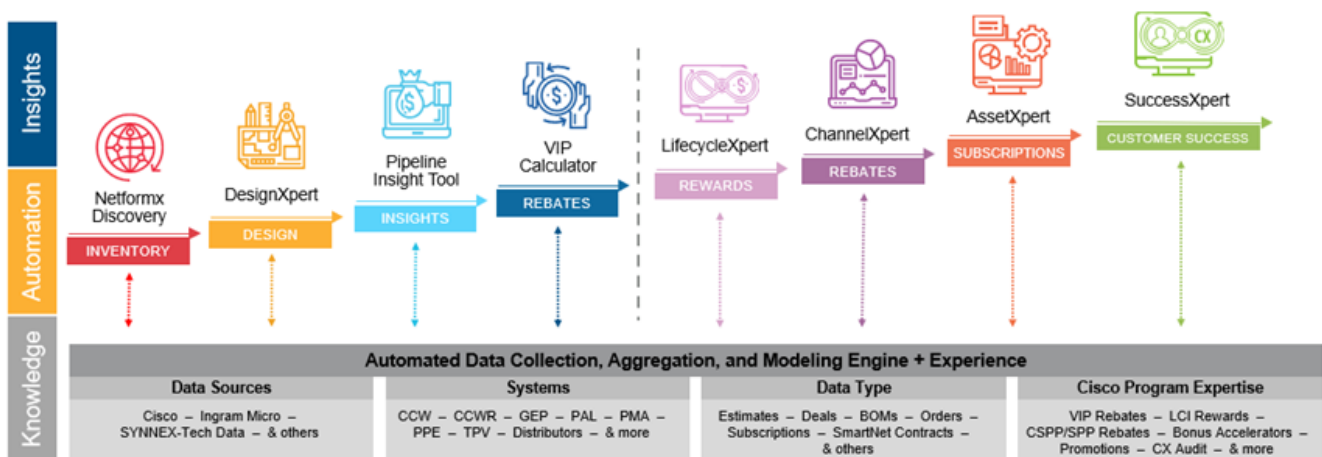
Building upon our domain expertise that began with flagship solutions such as **DesignXpert®** and **Discovery**, we have evolved our growing suite of applications from simplifying the quoting process to managing deal profitability and the customer experience through the entire lifecycle.

We bring efficiency to the partner’s interaction with Cisco by automatically analyzing consolidated, digestible data from distributors and numerous Cisco platforms and then maximizing partner rebates and rewards with insights and tracking that is specific to Cisco program requirements.

Equally important, Netformx supports partner-to-customer interactions throughout the customer lifecycle, from enabling end-customer portals for maintenance and subscription tracking and renewals, all with a focus on partner and customer success.

From presales to renewal, Netformx expertise in Cisco programs is built into our applications supplying insights to increase partner profitability throughout the customer lifecycle, provide automated partner reward and rebate management, and to deliver a better customer experience.

### The Netformx Tech Stack - Simplify the Partner Journey to Profitability



## Grow deal profitability with presales insights and automation

In an evolving competitive market, opportunity proposals must be designed to win the deal. However, to retain the customer there are numerous actions required throughout a journey (as illustrated above) that extends beyond the deal. Optimization for profitability, successful implementation, and then timely renewals are key. These actions might be taken by different partner teams, which highlights the importance of collaboration and information sharing. For example, it is critical to understand applicable incentive programs early in the sales process to optimize profitability, though they may be handled by different groups.

## Early insight to eligible Lifecycle Incentive rewards and potential VIP rebates

With automation, the *Netformx Pipeline Insight Tool (PIT)* enables partners to optimize their proposals and view relevant incentive programs early in the sales cycle, whenever a Cisco BOM or CCW Estimate is being created or a Deal is approved. By consolidating and analyzing data from both distributors and Cisco platforms, PIT provides both broad and deep pipeline insights by centralizing all direct and indirect estimates and deals and providing notifications such as price changes and EoX.

Powerful analytics help partners maximize profit, margin, and competitiveness and to quickly visualize the entire presales and rebate and reward pipelines. PIT establishes an automated process between the Sales and Customer Success teams for pre-PO engagement of Annuity & Architecture sales. It provides visibility into the Cisco Lifecycle Incentive (LCI)-rewards and Value Incentive Program (VIP) pipelines as well as eligible SKUs. Automatic calculations enable informed decisions and prioritizations that increase profitability. Partners can be confident that registered deals will meet their customer business needs, while taking into consideration early insight into how Cisco programs and strategic alignment can impact profitability.

## Maximize deal margins

The *Netformx Margin Analysis Tool (MAT)*, which is bundled with PIT, provides an innovative, automated way for Cisco Partners to determine end-customer

pricing and maximize their margins through accurate cost and sell margin analysis of CCW Estimates, Approved Deals and cost-based BOMs. Partners can assign margin targets for products, services, and subscriptions. They can also test what-if pricing scenarios to help determine their best sales-focused cost and price strategy.

## Automatically include professional services

The *Netformx Partner Services Tool (PST)* enables a partner to incorporate professional services including activation, adoption, training, customer experience, installation, design, and maintenance into their proposals. They can automatically map SKUs to the required tasks and services. Algorithms make it easy to assign services, to define roles, resources, hours, costs, and rates to projects, and to calculate margins.

## Analyze VIP rebates for potential payouts

The *Netformx VIP Calculator (VIPC)* calculates VIP rebates for Annuities and Architectures. VIPC provides levers for status specializations, such as Gold, Master, and Advanced. Data is presented by subtrack, and non-VIP SKUs are identified to provide a complete picture. It shows payout timelines for bonuses and MCV Annuity rebates and enables the partner to run what-if scenarios to find the most profitable and competitive solution.

## Streamline sales operations and enable efficient business management post-sale

*Netformx ChannelXpert™* uses innovative Cloud-based artificial intelligence, big data, and an analytics engine to maximize Cisco Partner financial benefits. It accelerates profits by providing actionable business insights in a single pane of glass, correlated, and collected from numerous sources. By automatically analyzing the most up-to-date data from those sources, partners can easily leverage, manage, and maximize VIP, CSPP/SPP, and more. On a single dashboard, ChannelXpert provides rebate and LCI reward program adherence, eligibility, milestones, due dates, bookings, targets, alerts to potential risks, and actions to increase rebates.

*Netformx LifecycleXpert™* is a significant feature included in ChannelXpert that simplifies the management of Cisco Lifecycle Incentive Program

opportunities and activities. LCI opportunities for both Annuity & Architecture bookings can be identified with a single click for prioritization to maximize payouts. LifecycleXpert provides automated, actionable insights and tracks LCI milestones and due dates, and correlates Deal IDs with POs to ensure eligibility. LCI-eligible orders are shared with the Customer Experience teams to ensure the lifecycle services are delivered and rewards are claimed. This in turn reduces churn and increases renewal rates.

### **Transform customer success with simplified IT asset, contract, and subscription management**

**Netformx AssetXpert™** enables asset management and identifies upsell opportunities. It provides a unified customer-centric view of assets, SmartNet contracts, and software subscriptions, as well as business intelligence on coverage, expiration, and renewal dates that inform and empower customer discussions. AssetXpert summarizes in real time the end customer's asset service contracts and Last Day of Support (LDoS) notifications as well as asset-to-service levels. It provides interactive search capabilities and drill-down of asset details and reflects the asset selections on a geographic heat map. An inventory upload from Netformx Discovery or other sources quickly enables contract coverage views including what is uncovered or covered by another partner. AssetXpert also helps partners automate the relationship with their end customers by offering self-service end-customer portals. End customers can view their contract and subscription data, open cases, and communicate with the partners leveraging AssetXpert.

### **The Power of 3 manages LCI**

Netformx "Power of 3" applications include the Pipeline Insight Tool (PIT), LifecycleXpert, and AssetXpert. Together, they enable Sales, Customer Experience, and Renewals teams to increase profitability by simplifying and automating the management of the LCI program throughout the customer journey to win more deals and better ensure reward payout and subscription renewals.

### **Automate customer success management**

**Netformx SuccessXpert™** is a Cisco Partner-ready Customer Success Management platform that

enables Customer Success and Customer Experience teams to continuously manage their Customer Experience (CX) motions. It automatically calculates customer success health scores and delivers customized alerts and notifications to ensure that LCI rewards are earned and paid and that the customer's desired business outcomes are realized. SuccessXpert has access to automated Cisco data feeds for subscription, utilization, incentives, LCI activity, and order data, thereby eliminating manual uploads. As a Partner-Ready solution it eliminates the build-out requirements of generic CSM platforms enabling partners to quickly pass the Cisco CX Advanced Specialization audit tool requirements.

### **Increase profitability by automating the sales lifecycle**

Netformx applications simplify how Cisco Partners and IT Solution Providers can enhance their customer experience efforts and increase profitability from Lifecycle Incentives, VIP rebates, CSPP/SPP, and more throughout the sales cycle. We merge our deep expertise of Cisco programs with complete, consolidated, and digestible data from distributors and numerous Cisco platforms to deliver actionable and intelligent data to the right people at the right time. Business outcomes are further enhanced with timely insights to manage renewals and discover replacement and expansion opportunities.

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### **About Netformx**

From presales to renewal, Netformx applications help Cisco Partners deliver a better customer experience and increase profitability. Consolidated and digestible distributor and vendor data is combined with applied logic and automation to ensure users have the right data at the right time to deliver value to customers throughout their digital transformation journey.

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