

# Netformx Pipeline Insight Tool

## Gain critical business insights with a 360-degree view of your Cisco pipeline



### *Making presales decisions in a vacuum impacts your competitiveness and profitability*

Cisco programs and incentives are frequently not considered during the presales process even though decisions made then can impact final program rewards and payouts. Value Incentive Program (VIP) and Lifecycle Incentive (LCI) program payouts depend on decisions made during presales. Yet those programs can be complex and useful data is not readily available to quickly identify actions that will improve profitability and competitiveness.

To make the most of your Cisco business during presales you need:

- Data at your fingertips that will increase your competitiveness
- Thorough analysis of estimates to maximize profitability
- Replacement VIP and LCI SKUs that provide larger payouts
- Quick VIP and LCI analysis results and insights before the deal closes
- Aggregated estimate, deal, and program data from Cisco platforms and distributors (via BOM upload)
- At-a-glance insights into your sales pipeline

With ready access to this kind of information during the estimate stage you can be confident that the registered deals will incorporate the margin you need to be profitable and win the deal.

### Netformx Pipeline Insight Tool unlocks program incentives early in the sales cycle

Unique in the industry, the innovative Netformx Pipeline Insight Tool (PIT) exposes Cisco Partners to all relevant program benefits and incentives hidden inside Cisco CCW estimates and BOMs, including those through Distribution.

In addition to automated pipeline financial and what-if analyses on estimates, PIT provides in-depth analysis and insights into Cisco's VIP and LCI programs.

With Netformx Pipeline Insight Tool you can:

- **Increase profitability** by automatically analyzing estimate costs and potential ROI
- **See aggregated estimate, deal, and program data** from Cisco platforms and distributors
- **Gain financial insights** into your estimate and deal pipeline
- **Increase VIP rebate potential** with powerful analysis
- **Identify LCI-eligible SKUs** in your LCI reward pipeline
- **Analyze and stack potential discounts** and promotions for an estimate or BOM
- **Determine business benefits** through contract value and annuity analysis
- **Be more competitive** with “what-if” scenarios at the SKU level

Through automation and a single-pane-of-glass user interface, you can quickly see the data you need to manage Cisco programs. Since PIT is easy to use and adds so much value, incentive optimization can be performed on every engagement as part of a standard presales workflow.

**Netformx PIT increases profitability and competitiveness**

*“Right from the start, Netformx Pipeline Insight Tool (PIT) has shown itself to be extremely useful across the sales organization and beneficial to our bottom line. By automating the process of analyzing Cisco programs, PIT enables us to choose the most beneficial SKUs and then complete the quote with lightning speed. This allows us to be more profitable and more competitive as a partner.”*

– Ranae Johnson,  
Responsible for National Cisco Alliance, Logicalis

## Get ahead of your competition

By incorporating incentives up front you can decide whether to pass the benefits on to help close the deal or retain the benefits to increase your overall margin.

With PIT you can analyze what your competition is probably going to do by creating a trial estimate that mirrors their likely play. If you know their VIP you can anticipate their cost structure and know what you need to do to counter their proposal and win the business.

## Automatically analyze your VIP rebates and gain insights on potential payouts

The Netformx VIP Calculator section of PIT analyzes presales deals and SKU costs and shows:

- What the VIP rebate will be on a deal
- Annuity monthly and total contract value (MCV & TCV) bonus rebates for the VIP period, by subtrack
- Architecture rebates by subtrack
- Total analyzed rebate for the VIP period
- Partner status and its uplift value
- Total deal cost after discount, adjusted by close date and VIP period

**Summary Metrics:**

- TOTAL COST:** AUD 154,457.32
- EXPECTED ORDER DATE:** 09/15/22
- VIP:** 40
- ANALYZED REBATE:** AUD 4,170.11
- TRANSITION PERIOD:** 07/31/22 - 09/29/22
- VIP 40 - TRANSITION PERIOD:** Ends in 9 days

**Architecture Summary:**

Architecture	Analyzed Rebate \$
Enterprise Networks	\$4,170.11
Collaboration	\$0
Security	\$0
Data Center	\$0
Mass-Scale Infrastructure	\$0
Meraki	\$0
IoT	\$0
<b>Total</b>	<b>\$4,170.11</b>

**Annuity - Analyzed Bonus Rebate (TCV) Summary:**

Category	Analyzed Bonus Rebate (TCV)
Enterprise Networks Annuity	\$0
Collaboration Annuity	\$0
Security Annuity	\$0
Data Center Annuity	\$0
Mass-Scale Infrastructure Annuity	\$0
Meraki Annuity	\$0
IoT Annuity	\$0
<b>Total</b>	<b>\$0.00</b>

**Annuity - Analyzed Base Rebate (MCV) Summary:**

Category	Analyzed Base Rebate (MCV)
Enterprise Networks Annuity	\$0
Collaboration Annuity	\$0
Security Annuity	\$0
Data Center Annuity	\$0
Mass-Scale Infrastructure Annuity	\$0
Meraki Annuity	\$0
IoT Annuity	\$0
<b>Total</b>	<b>\$0.00</b>

**SKU Details Table:**

Line Number	SKUs	Description	Cost	Qty	Extended Cost	Base	GOLD/CMSP	Master Specialization	Total Analyzed Rebate
1.0	C9300-48P-A	Catalyst 9300 48-port PoE...	\$6,534.22	4	\$26,136.88	3% (\$784.11)	0% (\$0.00)	0% (\$0.00)	\$784.11
15.0	C9300-DNA-A-48-3Y	C9300 DNA Advantage, 4...	\$2,571.14	4	\$10,284.56	4% (\$411.38)	1% (\$102.85)	1% (\$102.85)	\$617.07
24.0	C9300-NM-8X	Catalyst 9300 8 x 10GE N...	\$1,739.09	4	\$6,956.36	2% (\$139.13)	0% (\$0.00)	0% (\$0.00)	\$139.13

VIP Calculator makes it easy to see where you stand with VIP deals and what your rebates will be for the VIP period, including multi-period annuity payments. You can quickly drill down to SKU level to review details of the deal.

## Use the power of VIP Calculator to explore options

VIP Calculator enables you to test various alternatives to see if they improve profitability.

For example, you can:

- Check the impact of different Cisco plans or partner status values on VIP payout
- Compare potential rebates for the current and next VIP period
- Drill down to the line-by-line SKUs that apply to your VIP payouts
- Upload your BOMs to get insights for your upcoming deals through distribution

## Presales actions that result in a successful LCI program

Cisco's LCI program is intended to build a relationship between you and your customer throughout the lifecycle, from presales to installation and then renewals. Partners must meet strict LCI program requirements and orchestrate the customer journey across multiple internal organizations. One of the requirements for LCI payouts is the creation and timely submission of Customer Success Plans (CSPs). The CSP is effectively your strategic plan for the customer.

Best LCI practices are to:

- Share your preliminary CSP with the customer while they are evaluating your proposal, to ensure it meets their expectations and goals
- Identify LCI opportunities as early as possible during the sales workflow
- Coordinate with Customer Experience teams on deals with LCI opportunities and their CSPs
- Align the deal, installation Statement of Work, and the CSP to set customer expectations and prevent surprises

If you follow those practices the customer will have agreed to the CSP. They will appreciate that you will be teaming with them to achieve their goals throughout the process, not just when it's time for renewal. In addition, when the deal is signed, the CSP is already prepared and ready to meet Cisco's submission deadline.

## Identify your Cisco LCI opportunities during presales

Netformx provides an aggregated LCI view in PIT before the deal closes and in Netformx ChannelXpert™ after the deal closes.

It is a game changer to have early identification of any LCI-eligible SKUs and to know whether the deal is big enough to capture LCI rewards. Early visibility into the potential LCI rewards pipeline means you can prioritize your actions to increase profitability. Automated analysis and reporting provide relevant data and insights at your fingertips, eliminating many manual processes.



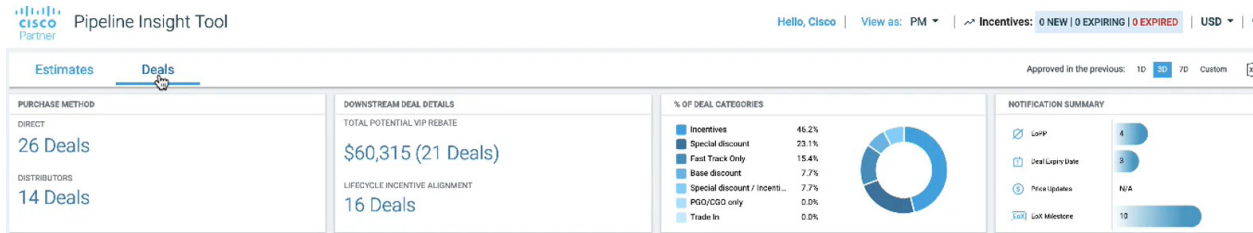
### Netformx tools simplify Cisco LCI program details

*"The Netformx tools have helped me make sense of the intricacies of Cisco and their LCI program. All the Netformx staff have been incredibly responsive. The first PIT tutorial not only showed me how to use the tool but included deal booking benchmarks based on other customers and recommended what we should look at to stay competitive. Their knowledge and insights were fantastic."*

— Ryan Webb, Director of Customer Success,  
SyCom Technology

PIT supports your LCI program by providing:

- LCI-eligible SKUs in deals and estimates
- The number of deals with LCI SKUs
- Deal size, to see if it meets the LCI cutoff
- Normal and bonus LCI payouts
- Pipeline reports to identify potential LCI opportunities

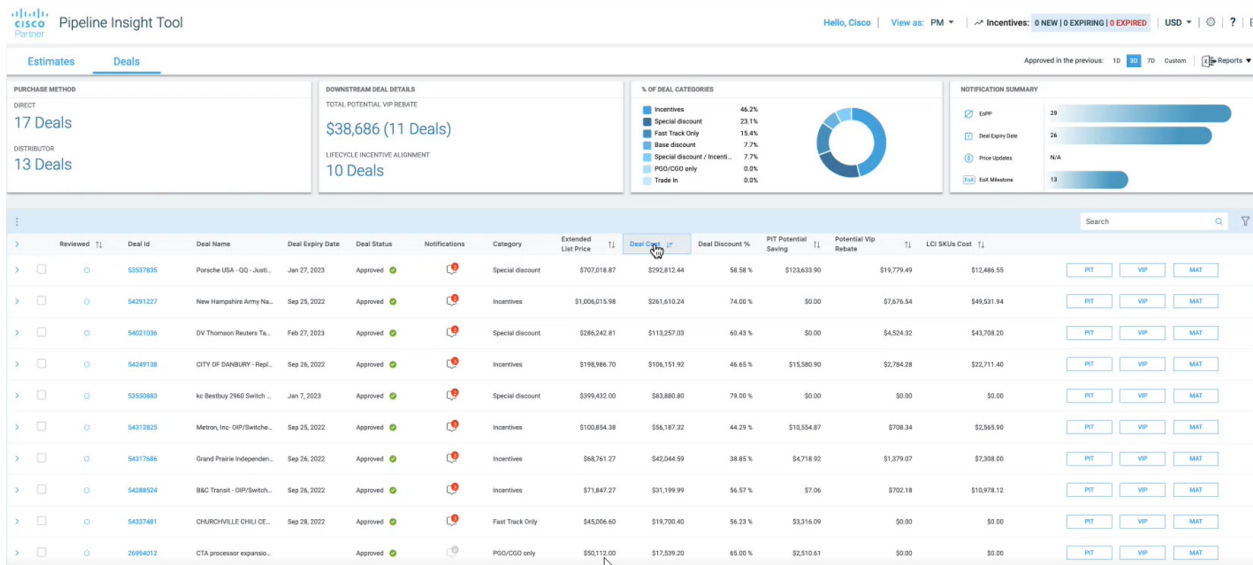


## Everything you need to know about your approved deals

PIT aggregates all your approved deals that are available from Cisco portals and distributor data.

You can:

- Sort by deal size
- See expiration date
- See deal cost and discount
- Automatically get the total VIP rebate for the deal
- Get the VIP rebate for Tier 2 distributor sales based on cost if the BOM has been uploaded, based on list price otherwise



## Increase gross margins with a 360-degree view of your Cisco pipeline

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PIT enables managers to maintain a 360-degree consolidated overview of seller and deal desk activity. Analytics provide real-time feedback to ensure the sales team works together to attain the best possible cost structures at the start of the sales cycle.

Sales managers can:

- Review sales team activity on a per-estimate and aggregated partner basis
- Influence the account team with steps to maximize deal registration profit potential
- Control access to VIP rebate amounts, with VIP Calculation administration rights (AMV)
- Access VIP deal data, with VIP Calculation AMV rights
- See deals and estimates modified in the last 30 days, with Program Manager (PM) rights
- See BOMs and all approved deals and estimates, with PM-AMV rights

## Pipeline Insight Tool optimizes deal profitability

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The Netformx Pipeline Insight Tool helps unlock cost and sell structures in CCW estimates to maximize program participation and increase profitability in the presales process. It identifies opportunities to take action and drives better Partner alignment to Cisco's strategic direction.

PIT not only helps the business but enables all the players involved in the various Cisco programs to be more productive. Through automation, PIT enhances collaboration, streamlines processes, and eliminates complexity. Easy report generation and aggregated deal and program data in one place facilitate:

- Communication within and across sales teams
- Early engagement and coordination with Customer Success Managers
- Easily accessible data for Finance to manage VIP payouts

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

## About Netformx, an Orchestra Group Company

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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.

