Partner Incentive Tool Guide

Lifecycle Incentive (LCI) Pipeline Reports

February 2021

Introducing (LCI) Pipeline Reports

Netformx establishes an industry first by providing Cisco Lifecycle Incentive Reward opportunity insight for pre-sales and pending-sales funnel activities. Using the Partner Incentive Tool (PIT) repository of collected Cisco Estimates & Approved Deals, the LCI Pipeline Report allows Partner PMs detailed analysis for Use (Activate) and Adopt & Expand LCI-based opportunities. The new interface enables the PM to set defined schedules for automatic publishing to applicable Customer Experience (CX) and Customer Success team members for advanced planning and engagement purposes.
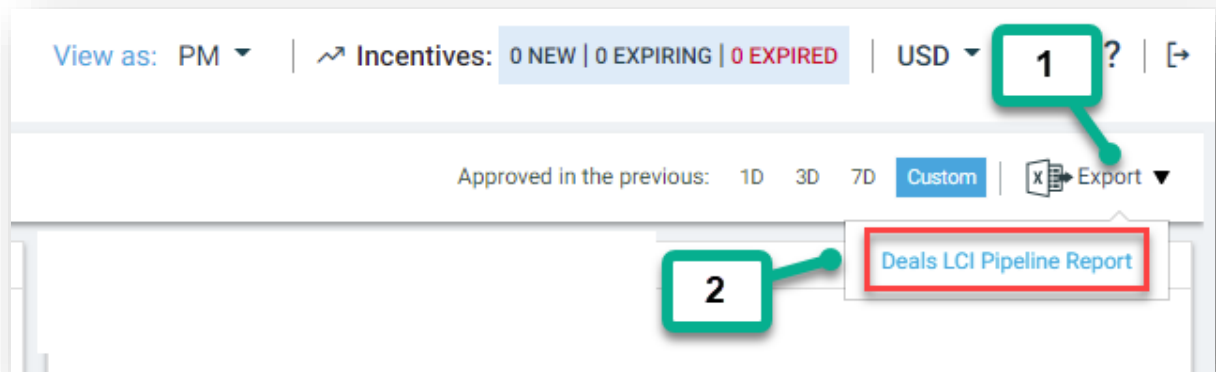
From the PM Estimate Landing Page

1. Trigger the Export UI
2. Select the Estimates LCI Pipeline Report.
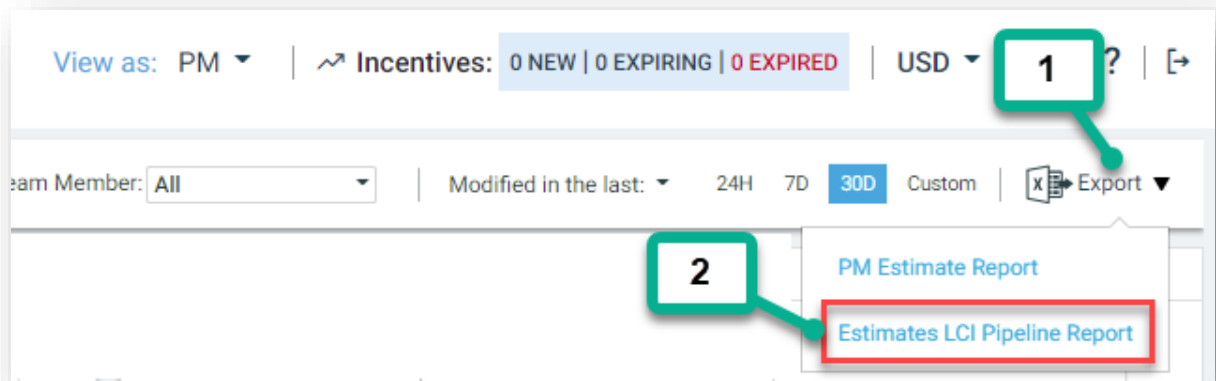
From the PM Deals Landing Page

1.   Trigger the Export UI
2.   Select the Deals LCI Pipeline Report

The LCI Pipeline Report UI opens

To generate an immediate report

1.	Define the Estimate or Approved Deals source date range
2.	Select the desired LCI Program to track
3.	Generate the Report

To create and email reports with automatic delivery

1.   Enable Report Recurrence
2.   Define the email schedule
3.   Set the report scope and LCI Programs
4.   Define your list of recipients
5.   Apply the desired settings

LCI Program	No. of SKUs	Quantity	No. of Deals	Deal Cost
LCI - Adopt & Expand				
⊞ Collaboration	596	820,466	150	$ 155,972,121.88
⊞ Data Center	245	23,024	37	$ 23,608,097.61
⊞ Enterprise Networking (EN)	132	11,213	23	$ 16,729,699.81
⊞ Meraki (EN)	133	137,321	36	$ 13,890,858.12
⊞ Security	347	2,916,025	67	$ 36,669,001.20
LCI - Use (Activate)				
⊟ Enterprise Networks	2	4	2	$ 60,151.85
⊞ _____ REGIONAL HEALTH	2	4	2	$ 60,151.85
LCI - Use (Activate), LCI - Adopt & Expand				
⊞ Data Center	78	1,416	22	$ 4,612,770.54
⊞ Enterprise Networking (EN)	303	38,212	51	$ 18,115,681.72
⊞ Security	11	27,002	7	$ 8,041,212.00
Grand Total	1,847	3,974,683	372	$ 277,699,594.73

The LCI Pipeline Report (immediate or emailed) breaks down the Partner list of Estimates and Approved Deals into an easy-to-read and actionable format via a pre-defined Pivot table for greater control. The default view organizes sales-funnel opportunities into the applicable Adopt & Expand, Use (Activate), and dual-definition classifications. According to Program Architecture, it distributes business with the named customers sorted most significant to smallest by total Net Book Value (Deals) and List or Cost Price (Estimates) upon expansion.