



Trends grows rebates & rewards with Netformx solutions

Information Technology (IT) sales are complex, and it is challenging for solution providers to maximize their profitability as products, price models, and incentive programs constantly change. Even with hours of research, it is challenging to keep up with the latest deals and requirements, and to access the data needed to make presales decisions that will increase competitiveness and maximize profitability. As a result, potential Cisco program discounts and downstream dollars from VIP rebates or the Lifecycle Incentive (LCI) program may not be fully utilized, which could lead to less profitable and competitive proposals.

Additionally, where programs were leveraged, without ongoing visibility to manage the bookings for LCI and VIP requirements, it is easy to miss opportunities to collect on the planned dollars.

Netformx tools drive profitability

Based in the Philippines, [Trends & Technologies, Inc. \(Trends\)](#) provides a wide range of Information and Communications Technology (ICT) services and solutions including network infrastructure, security, software services, collaboration, and business analytics. Although Trends works with distributors, 65% of their business is as a direct partner with Cisco.

Dennis Cruz, Head of Vendor Alliances - Collaboration and Solutions for Trends, is focused on providing an excellent customer experience and maximizing Cisco programs for increased profitability. His goal is to ensure the company leverages Cisco VIP rebates and LCI rewards by using [Netformx ChannelXpert™](#) to identify needed actions and ensure they are completed. This simplifies the business management of booked deals.

Rogino M. Cabuhat is Solution Sales Specialist for Trends' Infrastructure Business Solutions Group focused on presales. He has been using the [Netformx Pipeline Insight Tool \(PIT\)](#) for almost 2 years to optimize infrastructure, security, and wireless Bill of Materials (BOM) pricing. [Netformx VIP Calculator](#) has been an essential tool for Rogino to forecast, manage, track, and compare VIP program benefits.

Proactive VIP rebate management with ChannelXpert

Prior to using ChannelXpert, Dennis managed their VIP program using Cisco's Total Partner View (TPV) system. He manually manipulated and configured spreadsheets to create VIP program reports, which were then shared with management.

Dennis began using ChannelXpert in 2020 with VIP 36. ChannelXpert has made it easy for him and Trends' executives to closely track their VIP program on a regular basis. The reporting is comprehensive and accurate, and he can customize the report's details, so management has a complete view and full understanding of the company's VIP results and status.

Manage and communicate VIP rebate status with ease



"ChannelXpert has been a big timesaver for us as we manage our VIP rebates. The flexible reporting capability makes it simple to generate business and metric-focused reports to communicate our VIP status with top management."

– Dennis Cruz, Head of Vendor Alliances, Collaboration and Solutions, Trends & Technologies, Inc.

Trends' ChannelXpert VIP Benefits:

- Visibility into booking status to ensure they qualify for rebates and meet their business targets
- Easily monitor activities that need attention, such as shipping before the program deadline
- Ability to collaborate and easily share required actions with team members
- Insight to technology rebate payouts so they could adjust to selling technologies with higher payouts
- Quickly create monthly graphical reports for management to show growth against targets, instead of manually prepared quarterly reports
- As a result of proactive management, while Bookings have also increased, VIP rebates increased by 40% from VIP 35 to VIP 37

ChannelXpert highlights an MSI puzzle

Trends achieved their advanced service provider architecture certification to earn discounts and rebates for Mass Scale Infrastructure (MSI) bookings. However, ChannelXpert showed that the MSI rebates were a lower percentage than those for other architectures. While their large MSI service provider bookings increased their rebates, they dragged down their overall rebate performance percentage. With these easily accessible insights, Trends pivoted the sales business unit to focus on architectures with higher payouts, such as data center, collaboration, and security.

Prioritizing LCI-eligible customers with LifecycleXpert

Previously, Trends managed their Cisco LCI program by downloading raw Cisco reports. However, they had to manually determine which customers were eligible for LCI. It was a time-consuming job, so they only did it quarterly. This was not ideal since LCI filing and other deliverables are needed throughout the calendar year.

By using the [LifecycleXpert](#) features in ChannelXpert, Dennis can see at a glance the customers who are eligible for the program and prioritize those best suited for plan submission based on business size and feasibility of the timeframe.

Identify customers for the LCI program

"LifecycleXpert is an important LCI monitoring tool. It automates matching the customer with eligible programs so that we don't have to manually identify them! We are already seeing the results, like the \$5K payment we just got for an LCI customer filing."
— Dennis Cruz, Trends

Using LifecycleXpert, Dennis interacts with the Customer Experience (CX) team and provides them with the necessary data to manage and track progress along the lifecycle and to ensure all the deliverables are met on time.

Optimize BOMs with the Pipeline Insight Tool

Trends' typical presales workflow consists of getting Cisco CCW estimates, generating a BOM, and having Cisco provide the standard discount to the Account Managers (AM). But the AMs are not generally aware of other incentives and discounts available to them, such as Account Breakaway. These additional discounts, rewards, and rebates benefit the bottom-line, especially for those partners who don't have preferential discounts. Rogino's responsibility is to get the best Cisco BOM pricing for the AM. He uses the Netformx Pipeline Insight Tool (PIT) to fulfill this role.

Before using PIT, the AMs had to ask Cisco what additional discounts could be added to the proposal. Often, the AMs would speed up the process by just choosing the standard discount rather than researching other options.

Before registering deals, Trends is now using PIT to automatically analyze BOMs. With PIT, they can prepare a more competitive proposal, often capturing promotions that are better than Cisco's standard discounts.

Increasing rebates and discounts in proposals



"Although we can find and extract VIP rebate information from Cisco, it is faster and really helpful to visually see it summarized graphically in PIT. Sales appreciates my applying the additional rebates and discounts that PIT identifies. As a team lead or presales manager, that's the best help I can give to them."

— Rogino M. Cabuhat, Solution Sales Specialist, Infrastructure Business Solutions Group, Trends & Technologies, Inc.

Trends benefits especially from PIT when they do designs and proposals with new customers or infrastructure refresh projects, since most Cisco benefits are applied to newer technologies.

Analyze and display program payouts with VIP Calculator

Trends uses Netformx VIP Calculator regularly to obtain high-level views of VIP payouts and to analyze their VIP program. Since SKU cost structures created by PIT are immediately available in VIP Calculator, Rogino can see the potential VIP payout and details by architecture, annuity, and SKUs not eligible for VIP. He can easily summarize the VIP-calculated rebates and provide charts in a PowerPoint slide for management.

He also uses VIP Calculator to perform VIP analyses. For example, by reviewing the VIP 36 and VIP 37 reports he was able to see the impact on profit when a proposal slipped from Q1 to Q3.

Opportunities for additional value

While Trends is already getting excellent value from LifecycleXpert, they recognize that many features have not yet been explored. Many of those features will be of importance to them as they get more involved with LCI, for example automatically identifying which customers are eligible for Expand and using LCI historical data.

As their CX team gets onboarded, they will be able to use LifecycleXpert to manage the downstream aspects of each LCI plan, such as determining actions to take on plans and activities, meeting milestones and due dates, and tracking payments to ensure rewards are collected.

About Netformx

From presales to renewal, Netformx applications help [Cisco partners](#) deliver a better customer experience. 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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