

# Automating Processes Throughout the Sales Lifecycle

InterComms talks to Ittai Bareket, CEO of Netformx

**U**nder Mr. Bareket's strategic leadership Netformx has become a leader in automating and optimizing the pre-sales, post-sales, and asset management processes for IT solution providers, vendors, and distributors. Netformx helps Cisco-focused IT solution providers and distributors to increase revenues and create a streamlined buying experience for their customers. We do this by offering sales workflow products which provide an easier way to configure, design, and sell Cisco solutions with greater accuracy and speed, all aimed at improving Partner profitability. The result is better business outcomes.

## Case studies demonstrate the benefits of sales process automation

As we discussed in the previous issue of *InterComms*, excellent customer experience plus sales process automation is a winning recipe for IT solution providers. We highlighted specific areas where sales operations automation can be beneficial.

Automation streamlines sales operations, from pre-sales to renewals, by gathering and analyzing data from a variety of sources and providing the resulting insights in dashboards. Automated processes reduce costs and errors, and solution providers can spend their time focusing on their customers and their business outcomes instead

of manipulating data manually. Closed-loop, automated solutions maximize margins and increase productivity by eliminating complexity and efficiently incorporating discounts and incentive programs throughout the sales cycle. It's a win-win for both solution provider and customer.

In this article we highlight some actual case studies that demonstrate the benefits of sales process automation. For the automation of incentives and programs that increase profitability we'll focus on Cisco since they have one of the largest channel programs in the world. Their programs can be complex, and dynamic to fit market demand and strategy and thus provide a good opportunity for automation.

## Automated incentive and discount analysis

Cisco's promotions, discounts, and incentive programs are numerous, constantly changing, and can be complex. Even with hours of research "you don't know what you don't know." And Cisco Partner Account Managers may not be aware of the latest promotional opportunities applicable to a specific opportunity. Manual processes to analyze deal estimates for incentives have been the norm, with sales support teams either defaulting to their standard discount or spending hours or even days to plow through emails and documentation to analyze estimates manually—if they did it at all.

Now, with an automated incentive analysis tool—and no manual research—it takes just minutes to analyze a customer estimate and see what Cisco programs are currently available, as well as their terms and conditions. The sales team can then evaluate available options, do "what-if" calculations against the competitor's pricing and immediately see the impact on margin, to quickly pick the promotions that maximize the discount.

An incentive analysis tool gives them the insights they need to decide whether to use upfront discounts or backend discounts to get the best pricing. Automation reduces the risk of making a big financial mistake and gives confidence that the submitted deal is optimized. As a result, solution providers are getting more margin and are more competitive.

"Before we had the Netformx Partner Incentive Tool our sales team just applied standard DSA discounts to deals. Now, in under a minute, the PIT analysis shows all available promotion and incentive options, along with their cost discounts. Identifying qualifying Fast Track, OIP, and other discount opportunities is already paying off. So now our team can focus on business decisions and their customers instead of grinding through spreadsheets."

— Tom Cricchi  
CEO  
SyCom Technologies

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### Manage the business and optimize Cisco VIP and other rebates

Staying on top of Cisco's frequent Value Incentive Program (VIP) program changes is an ongoing challenge. Multiple Cisco databases need to be accessed and SKU price lists created for each program. To determine the VIP impact on a quote the sales representative would need to manually research the program specifics and enter hundreds of lines from the quotes. This process is very time consuming and, as usual with any manual process, can be prone to errors.

An analysis tool can manage Cisco VIP rebates and streamline sales operations by automating VIP data-gathering from multiple Cisco databases and analyzing the results. This eliminates home-grown templates and manual data entry.



Having an analysis tool with a business dashboard can provide a quick view of the solution provider's Cisco business and where they stand against their Cisco targets and can simplify their entire Cisco operation management. Instead of logging into several separate Cisco portals or manipulating spreadsheets, they get the up-to-date, accurate business results they need in minutes.

For example, it used to take 40-50 minutes to analyze a Bill of Materials for rebates, but with an analysis tool it typically takes just a few mouse clicks. They see the actual potential earnings on a deal, so no longer make educated



guesses using fudge factors to cover any errors. With the tool they know with a high level of confidence what the numbers are for the entire quote and can decide whether or not to take a lower margin to win a deal.

An analysis tool's dashboard can also provide VIP booking numbers and reports. These numbers are especially important to review near the end of the VIP period so the sales team can see what actions need to be taken to achieve outstanding rebates. Prior to using the analysis tool those booking numbers were basically not being looked at.

By providing 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.

### Streamline the IT sales process and optimize profitability

To win deals it's important to understand complex customer requirements, quickly and accurately create a proposal that meets their business needs and is priced competitively, and then successfully implement it on-time, on-budget, and without problems. And to optimize profitability, maximum advantage needs to be taken of vendor promotions and discounts.

Additionally, with the subscription economy, to keep annuity revenues flowing, solution providers must build and maintain strong relationships throughout the customer experience lifecycle, not just sell a product and move on. That means efficiently managing customer assets, contracts, and subscriptions.

Tools that incorporate automation, optimization, and analytics can simplify this complexity across the IT sales lifecycle while increasing profitability. They can bring significant efficiencies to pre-sales, post-sales, and asset management.

An integrated suite of tools provides end-to-end, seamlessly integrated insights and visibility into the business and enables the business to scale economically. Thanks to integration, projects and data can be shared across teams. Automation and financial analysis highlight ways to increase competitiveness and margins. Through actionable insights and business intelligence, their impact on the business can be provided in real time.

An integrated suite provides business value to end-customers and increases competitiveness. Benefits include proactive management of the business for better business outcomes; business-focused management of deals, vendor incentives and promotions, as well as service-attached rates for subscription and contract renewals. So, solutions can be delivered faster and more efficiently while simultaneously improving profitability and customer success.

### Automating the sales lifecycle

Automated sales enablement tools give IT solution providers an opportunity to streamline their business processes, so they are prepared to grow and spend more time on their customers. By automating manual tasks, the tools result in accurate, competitive quotes and are a critical foundation for profitability and customer success.

For more information please visit: [www.netformx.com](http://www.netformx.com)