Metrics Rules for Incomplete Partner Takeovers

Last updated: January 26, 2016

Note: The information in this guide is subject to change, cancellation, or modification at any time and is for operational guidance only; it does not imply, create, or modify any legal and/or contractual obligation. The metrics rules outlined in this document apply to all partner programs and regions.

Definition of Incomplete Takeovers

An incomplete takeover occurs when a customer selects a new partner (takeover partner) to provide service on their entire installed base, and the new partner does not cover their entire installed base* that is subject to takeover with Cisco, either by the takeover partner’s or the customer’s choice.

*As reflected in the incumbent partner’s Total Program View – Metrics data.

Incomplete Takeover Metrics Adjustment Rules

When an incomplete takeover occurs, the incumbent partner can request a metrics adjustment by providing evidence of the takeover:

• The incumbent partner can open a support case for the incomplete takeover and include the Total Program View - Metrics detailed report highlighting the items in question as well as the informal confirmation, if required. The incumbent partner must:
  o Identify all metrics opportunities subject to takeover, including those that are flagged as “Other Partner,” in the detailed report from the Total Program View tool, Metrics section.
    • If items are flagged as “Other Partner,” no further evidence of the takeover is required.
    • If items are not flagged as “Other Partner,” the incumbent partner must provide written confirmation from the end customer that a takeover has occurred. The end customer and its incumbent partner must both agree, and provide to Cisco written evidence of that the end customer’s services contract with the incumbent reseller will be made inactive, and support of the end customer’s installed base under that contract will be taken over by another Cisco partner or by Cisco directly. The customer confirmation should include:
      • Effective date of the takeover
      • Takeover partner’s name (and/or confirmation these items are subject to takeover)

Cisco will validate the information provided and, if warranted, will remove all items that are subject to the takeover from the incumbent partner’s renewal rate and add those items to the takeover partner’s renewal rate metric.

Any dispute that includes takeover items that are unconfirmed, or are simultaneously covered by two or more partners, Cisco reserves the right to close such dispute without any adjustments. Due to the complexity of the US Federal government procurement process, we cannot process Incomplete Takeover Cases for US Federal customers.
For confirmed takeover items, the incumbent partner will be provided metric relief on their renewal rate for those items subject to the takeover once the items are added to the takeover partner’s metrics data.

The takeover partner will see all items subject to the takeover included in their renewal rate as “renewal opportunities” and will receive a renewal rate benefit for any item with takeover coverage.

When a partner takes over the installed base previously covered by the incumbent partner, and a portion of the installed base remains uncovered with Cisco through the takeover partner, the following applies:

- The installed base items being taken over by, but not covered by, the takeover partner must exceed 10% (ten percent) of the incumbent partner’s total renewal base for the end customer.
- The unrenewed portion must meet the region-specific minimum threshold as indicated in Table 1.

<table>
<thead>
<tr>
<th>Table 1. Region Specific Minimum Thresholds</th>
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<tbody>
<tr>
<td>Region</td>
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<tr>
<td>Americas</td>
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<td></td>
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<tr>
<td>Europe, Middle East, Africa,</td>
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<td>and Russia (EMEAR)</td>
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<td>Asia Pacific, Japan, and</td>
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<td>China (APJC)</td>
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*Note: Cross-region takeovers must meet the lowest threshold of the receiving theater.*

Effects on Metrics in Performance Metrics Central

Upon completion of the metric adjustment steps described above, the following will occur:

- The incumbent partner will see relief for all items assigned to the takeover partner.
- The takeover partner will become responsible for the reassigned takeover coverage opportunity. If the takeover items are software (nonserialized), Total Program View may not automatically recognize transferred opportunities as renewed by the takeover partner. In this case, the takeover partner will need to initiate the standard dispute process and request a separate line-level adjustment in order for the renewal to be granted.
- The impact on the takeover partner’s metrics will depend on actual takeover coverage as per the standard calculation rules.
Reconciliation of Transferred Takeover Coverage Opportunity

The reconciliation of the transferred takeover coverage opportunity should be initiated by the takeover partner, using the standard metrics dispute process. Any removal of only the disputed items will be allowed in line with current metrics rules.

If a discrepancy is found by the takeover partner, a dispute case must be submitted within the next dispute window for the quarter in which the renewal rate item(s) were added to the takeover partner’s metrics as a result of a dispute by the incumbent partner.

Partners can track their performance using Metrics tab in Total Program View (TPV) as of November 16th, 2015. "Launch Total Program View (TPV)."

For metrics and bookings dispute deadlines, please refer to the published calendar on the PMC Support community; under Publication calendar & Metrics review deadlines section:

Any late disputes cannot be considered and will be rejected. To submit a case, use Customer Service Central at https://www.cisco.com/cisco/psn/web/workspace.