

Cisco Sales Collaboration Platform



PARTNER USER GUIDE - MARCH 2013
NORTH AMERICA, LATIN AMERICA, CANADA

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Helping Partners Take the Lead

Cisco Sales Collaboration Platform



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Accelerating Opportunities Through Collaboration

“Collaboration is in our DNA at Cisco. With the Sales Collaboration Platform, we have a great way to collaborate with our partners to accelerate growth.”

Andrew Sage
Vice President, Worldwide Partner Led Sales

The Cisco Sales Collaboration Platform is a new way for Cisco to work closely with our partners to accelerate growth by sharing leads, prospects, and *customer intelligence with partner sales teams.

Continuing its global roll-out during 2013, the Platform integrates with [Cisco Commerce Workspace \(CCW\)](#) and is designed to accelerate the focus on key sales opportunities through early account engagement with Cisco sales and use of *customer intelligence.

A key enabler of our Partner Led go-to-market strategy, the Platform will become foundational in support of our profitable partnership. Please use it to collaborate with us on sales opportunities.

*Where available

Benefitting Your Business

Collaborate with Cisco early in the sales process to drive incremental revenue through your pipeline.

A consolidated view of Cisco opportunities, with Customer Intelligence (CI), where available, can enable more effective sales planning and execution, and may help reduce time-wasting channel conflicts on deals.

Target Prospect Engagement

- Focus on high-potential accounts

Early Visibility of Opportunities

- Engage with accounts earlier

Customer Intelligence (Where Available)

- Increase win rate, expand deal size, reduce cost of sale

Lead and Prospect Management

- Improve business visibility

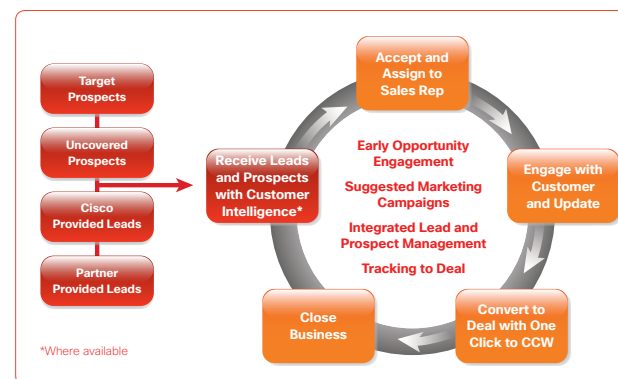
Joint Progress Tracking

- Improve sales planning and resource management

Integration with Cisco Commerce Workspace (CCW)

- Use one click to CCW, and more easily enter a deal and register for incentive programs.

Figure 1. Cisco and Partner Collaboration in the Sales Process



Sales Collaboration Platform: SCP Mobile

And now the Platform has gone mobile. **SCP Mobile** is an extension of your desktop, enabling you to get closer to prospects and leads with powerful mobile features such as GPS maps, automatic updates, and favorites. [See page 22.](#)

Learn More and Access Training

Visit [Sales Collaboration Platform](#) or speak to your Cisco sales contact.

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Onboarding

The [Cisco Sales Collaboration Platform](#) is designed to support your working relationship with Cisco, so your usual Cisco sales contact will support you through the onboarding process.

Introduction Session

- Find out how the Platform can benefit your business

Identify your Users

- Enroll your company and enroll your salespeople

Training Session

- View training modules with your Cisco sales contact

Start Collaborating Session

- Review Target Prospects and Leads (when available)

Ongoing Collaboration

- Continue to work closely with your Cisco sales contact for support with Prospects and Leads
- Add Notes, Attachments, and Tasks to the Platform, for ongoing tracking

The screenshot displays the Cisco Sales Collaboration Platform interface. The top navigation bar includes the Cisco logo, links for Products & Services, Support, How to Buy, Training & Events, Partners, Worldwide, Log Out, Account, My Cisco, and Support. Below the navigation bar, the main heading is "Cisco Sales Collaboration". Underneath, it shows "Partner Admin: Nate Johnson" and "Partner Account : TEST - Intel_Test_DF_CCW". A horizontal tab bar contains four tabs: "Target Prospects", "Leads", "My Cisco", and "Cisco Commerce". The "Target Prospects" tab is selected and highlighted with an orange oval. Below the tabs, the "Target Prospect Detail" section is visible, featuring buttons for "Extend", "New Deal", "View All Deals", and "Target Prospect List". The "Assignment Information" section displays details for a customer named "WALL STREET SYSTEMS" (with a red dot icon), including "TBM/TAM: PAUL SORGE", "Target Architecture: Video-TelePresence & Conferencing", "Cisco Recommended PSR: Brad Madison", "Expiration Date: 26-Apr-2013", "Prospect Age (Days): 0", and "Target Description: Test Description". The "Additional Customer Information" section shows "Propensity to Buy, Top Data Center Propensity to Buy". The "Partner Information" section at the bottom shows "Partner Status: Partner Assigned" and "Assigned Partner Sales Rep: Assigned Partner Sales Rep 3".

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Enrollment Overview

To obtain access to the Sales Collaboration Platform partner companies must be enrolled and identify the sales individuals who will require access to the system.

Partners Have Two User Types

The Sales Collaboration Partner Admin (PA) is the person identified to enroll the partner company in the Sales Collaboration Platform and grants access to other employees/contacts. They could be a Sales Manager, Sales Rep, or Sales Administrator and are responsible for accepting/rejecting, and assigning leads and target prospects to Partner Sales Reps (PSRs). The Partner Admin can also perform the functions of the Partner Sales Rep. A partner can have several PAs.

The Sales Collaboration Partner Sales Reps (PSRs) are salespeople at the partner company. They accept/reject, update and convert leads and target prospects in the Sales Collaboration Platform, collaborate on opportunities with their Cisco Sales contact and enter deals in CCW.

Once enrolled, all users can add the Platform to [My Cisco Workspace](#) for easy access through that tool.

Partner Admins From Partner Plus Partners

If your company has completed enrollment in the Partner Plus program, your company should already be enrolled to the Sales Collaboration Platform.

You will have received an email confirming this. It provides a link and instructions to enable you to assign individuals in your company to the role of Partner Sales Rep (PSR) and/or Partner Admin (PA), for the Platform.

For these instructions, go to [Partner Admin](#) and see under [Assign Your Salespeople to the Platform](#).

Partner Admins From Non Partner Plus Partners

Please go to [Partner Admin](#) and follow the enrollment instructions to first enroll your company and then your company's sales individuals.

Partner Sales Reps (PSRs) From All Partners

As a PSR, you will receive a [welcome email with a link and instructions](#) on how to access the Sales Collaboration Platform. (Note: It can take 14–36 hours after assignment by the Partner Admin (PA), for access to the Platform to be available.)

If you have not received this email, or are having trouble accessing the Platform, please contact your Sales Collaboration Partner Admin (PA) first to ensure they have assigned you to the PSR role. If you are still having problems, please speak to your Cisco sales contact or the [Partner Relationship Team \(PRT\)](#).

Problems enrolling?

Please speak to your Cisco sales contact or go to the [Partner Relationship Team \(PRT\)](#).

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Overview | **Instructions** | Screenshots | My Cisco Workspace

Sales Collaboration Partner Admin Role

Enroll Your Company in the Sales Collaboration Platform

1. You will need your valid Cisco.com ID
2. Go to the [Partner Program Enrollment \(PPE\)](#) tool
3. At the Eligible Programs tab, expand the **Profitability and Practices** section
4. Locate the **Cisco Sales Collaboration Platform** program and click **Select**
5. Validate your information
6. Select **Save and Continue**
7. Review Terms and Conditions and click the check box to approve
8. Click **Continue**
9. Click **Submit Request**

To view the screenshots that accompany these instructions, please go to [Screenshots](#).

Assign Your Salespeople to the Platform

You will receive an email containing a link to enroll sales individuals to the role of Partner Sales Rep (PSR) using the Partner Self-Service (PSS) tool.

1. Go to [Partner Self-Service \(PSS\)](#)
2. Under **Choose a Task** select the drop-down menu for **Update Company Contacts Access**
3. On the **Company Access** tab, at **Search For An Individual**, enter search criteria for an employee (i.e. **Cisco.com ID**, **email address**, **name**) and click **Search**
4. You may also click on the **View All Contact Access** link at the top of the tab to view all employees/contacts
5. Select the desired employee/contact and click **Edit**
6. Check the box to grant the desired level of access to the employee:
 - **Sales individual:** Select **Sales Collaboration Partner Sales Rep**
 - **Partner administrator:** Select **Sales Collaboration Partner Admin** and **Partner Sales Rep**

7. Click **Next**

8. Click **Submit** and repeat the above steps to grant access to additional employees if desired

If an individual is not listed, and if you have permission, enter that person's information into the [Partner Self-Service \(PSS\)](#) system following the standard procedures. You can also contact the administrator for your Cisco partnership to add new contacts.

A welcome email will be sent to each enrolled individual with a link and instructions for accessing the Sales Collaboration Platform. (Note: It can take 14-36 hours after assignment by the Partner Admin (PA), for access to the Platform to be available.)

Problems enrolling?

Please speak to your Cisco sales contact or go to the [Partner Relationship Team \(PRT\)](#).

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Enrolling Your Company in the Platform

1. You will need your valid Cisco.com ID
2. Go to the [Partner Program Enrollment \(PPE\)](#) tool
3. At the Eligible Programs tab, expand the **Profitability and Practices** section
4. Locate the **Cisco Sales Collaboration Platform** program and click **Select**
5. Validate your information
6. Select **Save and Continue**
7. Review Terms and Conditions and click the check box to approve
8. Click **Continue**
9. Click **Submit Request**

PARTNER PROGRAM ENROLLMENT (PPE)

Welcome, pec_hold_test_15 !

You are now ready to enroll and manage multiple Cisco Channel Partner Programs through this integrated platform.

Preferred Language: English [Change Language](#) [My Proxy](#) [FAQs](#)

Disclaimer: This application accepts input in English only

Tool Links
[Select Link](#)

Eligible Programs | Potential Programs | Enrollment Dashboard

Program Name	Program Description
Hunting	
Profitability And Practices	
Select Cisco Sales Collaboration Platform	Global sales collaboration platform for partners focused on mid-sized and SMB customers. Enables targeted account-mapping for improved deal collaboration, demand generation to reach untapped opportun more...

The Partner

*Required Field

Partner Name and Address: PDB TEST PARTNER 4
5th floor
Bangkok,
THAILAND
[View Partner Profile](#)

Use the Contact Details in my User Profile: ☒

Partner Contact: *

First Name: * pec_hold_test_15 Last Name: * pec_hold_test_15

Title: * FE

Phone Number: * 408-409-4567

Email Address: * pdr_qa_3@yahoo.com

Cisco Channel Account Manager (CAM): Other ▼

[Find your CAM with the CAM Locator.](#)

Cisco Channel Account Manager (CAM) Email ID: @Cisco.com

Save and Continue

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Overview | Instructions | **Screenshots** | My Cisco Workspace

Assigning Your Salespeople to the Platform

1. Go to [Partner Self-Service \(PSS\)](#)
2. Under **Choose a Task** select the drop-down menu for **Update Company Contacts Access**
3. On the **Company Access** tab, at **Search For An Individual**, enter search criteria for an employee (i.e. **Cisco.com ID, email address, name**) and click **Search**
4. You may also click on the **View All Contact Access** link at the top of the tab to view all employees/contacts
5. Select the desired employee/contact and click **Edit**

Products & Services | Support | How to Buy | Training & Events | Partners

Partner Central

Partner Self Service ([Home](#))

My Access | **Company Access**

Search for Tool Users in Company [[View all Contact Access](#)]

Access Privilege: All Types of Partner Administrators
Country/Country Group Access: Any Country/Country Group
For Contacts Located In: USA

Search

Search For an Individual

The search will be based on exact matches.
For example: If you enter "Jonson" as the last name, it will not show "Johnson". You must correctly enter the entire word.

Related Tools
[Partner Education Connection](#)
[Steps To Success](#)
[Get Help from the Partner Relationship Team](#)

Related Links
[Channel Partner Program](#)
[Certification Program](#)
[Specialization Program](#)
[Channel Incentive Programs](#)
[Value Incentive Program](#)

Support
[FAQs](#)
[User Guide](#)
[Partner Support Team](#)

Partner Self Service ([Home](#))

My Access | **Company Access**

All Contacts

As a Partner Administrator, you can manage tool access privileges for your employees. Select a user and choose "Edit" to manage their access privileges.

TEST - SALADIN TRADING - BG_OF_CCW (USA)
Currently Viewing as: PEC Test PDB Profile

Name	Tool	Access Level	Country / Country Groups
Flinstone, Wilma (USA)	Channel Partner Tools	Cisco.com Partner Level Access	Automatic access granted from company association.
	Certification and Specialization Application (CSApp)	Administrator	USA
	Partner Program Intelligence	Administrator	USA

Edit | **Search Contacts**

Showing 1-1 of 1 results < Prev Page: 1 Next >

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Assigning Your Salespeople to the Platform

6. Check the box to grant the desired level of access to the employee:

- **Sales individual:** Select **Sales Collaboration Partner Sales Rep**
- **Partner administrator:** Select **Sales Collaboration Partner Admin and Partner Sales Rep**

7. Click **Next**

8. Click **Submit** and repeat the above steps to grant access to additional employees

If an individual is not listed, and if you have permission, enter that person's information into the **Partner Self Service (PSS)** system following the standard procedures. You can also contact the administrator for your Cisco partnership to add new contacts.

A welcome email will be sent to each enrolled individual with a link and instructions for accessing the Sales Collaboration Platform. (Note: It can take 14-36 hours after assignment by the Partner Admin (PA), for access to the Platform to be available.)

Partner Self Service (Home)

My Access **Company Access**

Edit

For checkboxes that appear:
Uncheck any items to remove access or check any items to grant access, and click "Next."

Editing Access For: [Kunal Adhikary \(INDIA SUB-CONTINENT\)](#)

Tool	Access Level	Country / Country Groups
Certification and Specialization Application (CSApp)	Administrator	<input type="checkbox"/> INDIA SUB-CONTINENT
Partner Self Service (PSS)	Administrator	<input type="checkbox"/> INDIA SUB-CONTINENT
Sales Collaboration Platform	Administrator	<input checked="" type="checkbox"/> INDIA SUB-CONTINENT
	Sales Rep	<input checked="" type="checkbox"/> INDIA SUB-CONTINENT
Partner Program Intelligence	Administrator	<input type="checkbox"/> INDIA SUB-CONTINENT

Partner Self Service (Home)

My Access **Company Access**

Edit

Editing Access For: [Kunal Adhikary \(INDIA SUB-CONTINENT\)](#)

You are about to GRANT the following access privileges:

Tool	Access Level	Country / Country Groups
Sales Collaboration Platform	Sales Rep	INDIA SUB-CONTINENT

Please Enter Your Comments for this Update (Max: 300 characters)
(these comments will be included in the email sent to notify this individual of these access changes)

Cancel **Submit**

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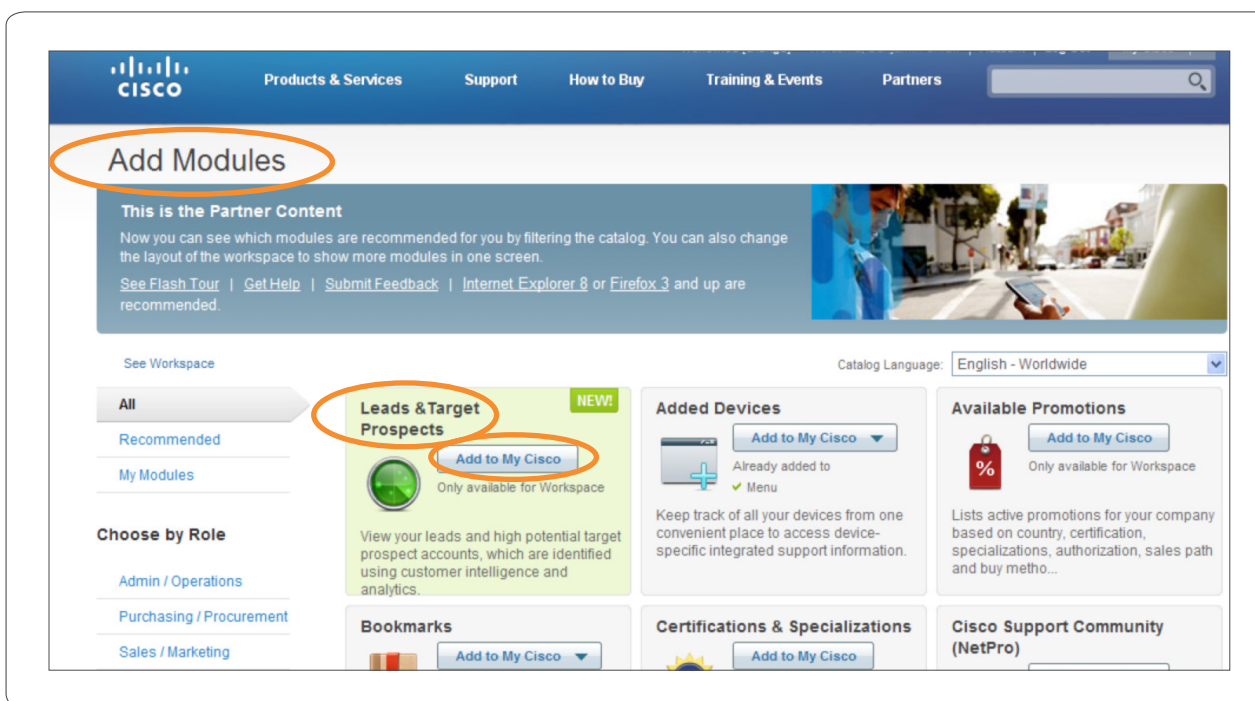
Overview | Instructions | Screenshots | **My Cisco Workspace**

All Users: Add to My Cisco Workspace

Once enrolled, you can add the Platform to your **My Cisco Workspace** for easy access and viewing through that tool.

1. Go to [My Cisco Workspace](#)
2. Go to the **Add Modules** page and select the **Leads & Target Prospects** module
3. Click **Add to My Cisco**
4. Click **See Workspace**

Note: It can take up to 36 hours between completing enrollment and being able to view the Platform through My Cisco Workspace.



Browser Compatibility

The Cisco Sales Collaboration Platform, My Cisco Workspace and Cisco Commerce Workspace (CCW) are best experienced using IE8 or the latest version of Firefox.

For instructions on how to receive, view, assign, and work with Target Prospects, Leads, and Uncovered Prospects through to Deal in [Cisco Commerce Workspace \(CCW\)](#) go to [Using The Platform](#).

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Target Prospects | Leads | Uncovered Prospects | Customer Intelligence

Target Prospects

A Target Prospect is a company/account that, based on intelligence and analytics, has a high potential to generate sales opportunities for one or more technologies or solutions.

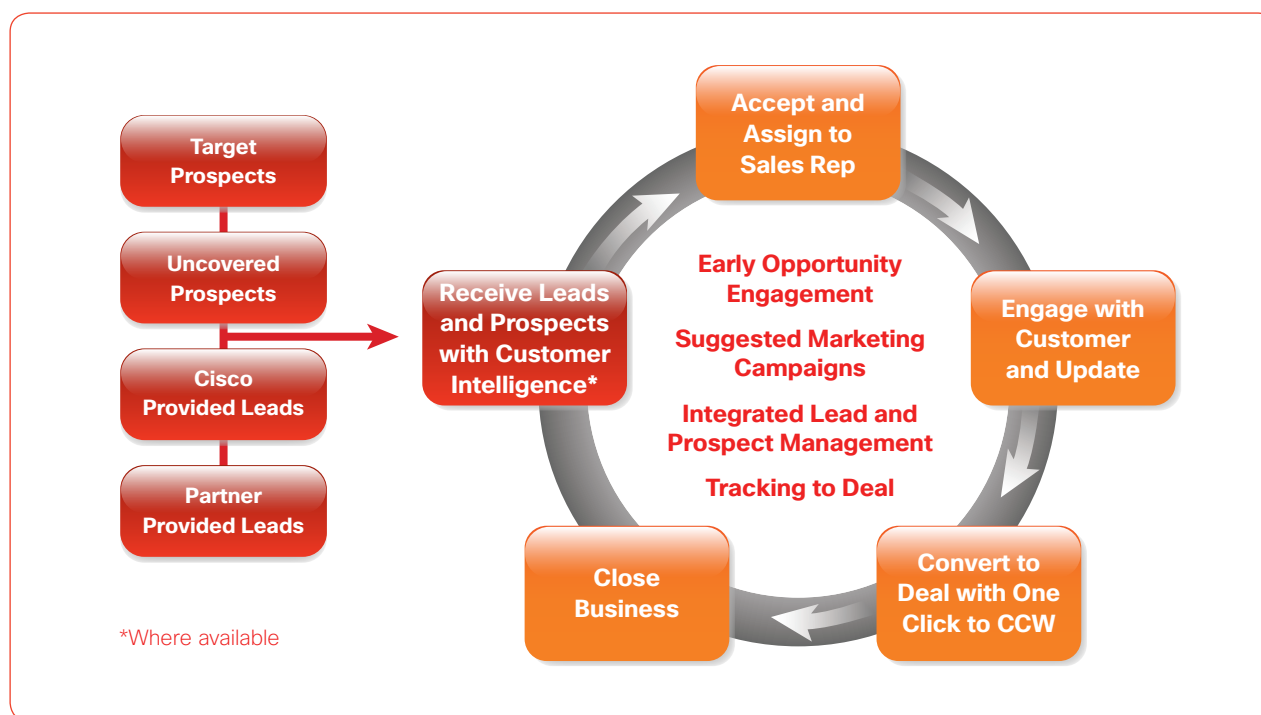
Cisco will upload to the Platform details on high-potential accounts, with Customer Intelligence (CI) where available. Potential primary customer opportunities are identified based on an analysis of installed base data and intelligent predictive models.

Customer Intelligence availability varies by region. Please contact your Cisco sales representative for details.

After viewing the Target Prospect and CI, your Sales Collaboration Partner Admin (PA) accepts and assigns the Prospect to a Partner Sales Rep (PSR). The PSR engages with the customer, identifying potential sales opportunities, with the support of the Cisco sales team. By updating the Platform with information about the sales engagement, we have joint tracking and visibility during the sales cycle.

The process to create a deal is simplified, with one click to [Cisco Commerce Workspace \(CCW\)](#) that pre-populates the new Deal with the data captured so far. The PSR then proceeds to booking in CCW in the usual way,

including registering for [incentives programs](#) such as the Opportunity Incentive Program (OIP), Solution Incentive Program (SIP), and Teaming Incentive Program (TIP).



For instructions on how to receive, view, assign, and work with Target Prospects, Leads, and Uncovered Prospects through to Deal in [Cisco Commerce Workspace \(CCW\)](#) go to [Using The Platform](#).

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Target Prospects | **Leads** | Uncovered Prospects | Customer Intelligence

Leads

A (BANT) Lead is a company/account that has expressed an interest in a Cisco solution, and that is qualified by Cisco, a vendor, or a partner to have budget, need, and timeline.

Where available in your region, Cisco will upload Leads to the Platform for you to accept and assign to a Partner Sales Rep (PSR) in the same way as for Target Prospects.

Lead Categories: Definitions

Cisco Leads will be categorized to help with prioritization and to identify what action is needed.

BANT Criteria

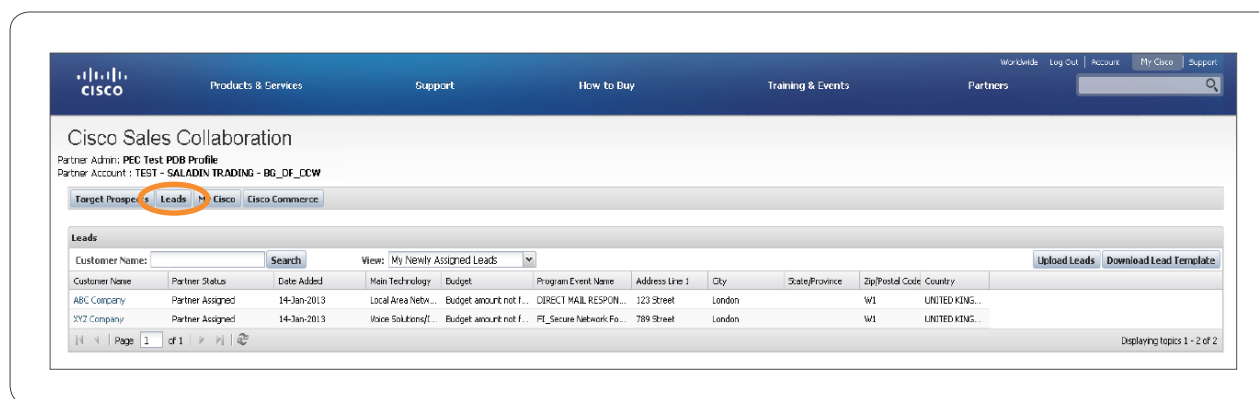
- **BANT** refers to the key lead-qualification criteria: **Budget, Authority, Need, Timeframe.**

Appointments

- Appointment leads are from joint programs between Cisco and a Partner where the call center is arranging an appointment for a partner. These will include all **BANT** and appointment details such as proposed dates and types of appointment.

Quote Request

- Leads in which the customer or contact has requested a quote from Cisco or a partner. The call center will attempt to collect the project technology and timeframe prior to passing a Lead to sales.



Demo or Trial

- These Leads will include any demo or trial requests received through the call center. The call center will attempt to collect the project technology and timeframe prior to passing the Lead to sales.

Attendees

- Contacts who have attended an event where the partner or sales person has agreed to follow up. These may or may not include the **BANT** questions depending on the data collected at the event.

Cisco Leads may also have Customer Intelligence, where available, attached to them. This varies by region so please check with your Cisco sales contact.

The process for managing Leads on the Platform is similar to that for Target Prospects.

You (or your vendor) can also upload leads to the Platform, to better collaborate with your Cisco sales contact. For co-marketing demand generation campaigns, this will facilitate reporting and tracking the ROI.

For instructions on how to receive, view, assign, and work with Target Prospects, Leads, and Uncovered Prospects through to Deal in [Cisco Commerce Workspace \(CCW\)](#) go to [Using The Platform](#).

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Target Prospects | Leads | **Uncovered Prospects** | Customer Intelligence

Uncovered Prospects

An Uncovered Prospect is a company/account that, based on intelligence and analytics, has little or no Cisco purchase history but has potential for a specific technology or solution.

Uncovered Prospects will be shared with our channel partners through the [Sales Collaboration Platform](#), providing incremental new business opportunities.

The process varies by region, so please check with your Cisco sales contact.

Cisco will also suggest marketing campaigns that would be suitable for addressing these Uncovered Prospects, including links to the marketing materials for you to use.

The process is then similar to that for Target Prospects and Leads.

Cisco Sales Collaboration

Partner Admin: PEC Test PDB Profile
Partner Account : TEST - SALADIN TRADING - BG_DF_CCW

Target Prospects Leads My Cisco Cisco Commerce

Target Prospect List

Customer Name: Search View: Uncovered Prospects Work Prospect

	Customer Name	Expiring On	Prospect Age (Days)	Industry	Partner Status	Date Added
●	TRAVEL CLICK	18-Apr-2013	9		Partner Assigned	18-Mar-2013
●	TACONIC CAPITAL ...	19-Apr-2013	9	FIN_SRV- B...	Partner Assigned	18-Mar-2013
●	WALL STREET SYST...	20-Apr-2013	9		Partner Assigned	18-Mar-2013
●	WALL STREET SYST...	26-Apr-2013	0		Partner Assigned	27-Mar-2013

Page 1 of 1 Displaying Accounts 1 - 18 of 18

For instructions on how to receive, view, assign, and work with Target Prospects, Leads, and Uncovered Prospects through to Deal in [Cisco Commerce Workspace \(CCW\)](#) go to [Using The Platform](#).

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Target Prospects | Leads | Uncovered Prospects | **Customer Intelligence**

Customer Intelligence (CI) (Where Available)

Customer information based on an analysis of installed base data and intelligent predictive models. It includes for each Cisco technology, the company/account's: (1) estimated wallet size – potential technology spend, (2) the prospect's propensity to buy technologies or solutions, and (3) sales alerts with related marketing campaigns.

1. Estimated wallet size – potential technology spend

Uses the Cisco analytical model to predict the wallet size of an account in a given timeframe. Use this CI to gain an overall understanding of the size of the account, and to help plan and prioritize how best to engage with an account.

Companies/accounts are categorized as follows:

- **Wallet Type** – value as estimated by Cisco: Small/Medium/Large or Low/Med/High (terminology varies by Region)
- **RAD Strategy** – sales approach based on Cisco's wallet-share*: **Retain, Acquire, Develop**
 - **Retain** = greater than 50% wallet share.
 - **Acquire** = less than 10% wallet share.
 - **Develop** = 10–50% wallet share.
 - **Prospect** = 0% wallet-share.

Current/Previous FY Wallet and RAD	
Current Fiscal	Previous Fiscal
Current FY Wallet-Total (\$'000): 1500	Previous FY Wallet-Total (\$'000) 1200
Current FY Wallet Type: High	Previous FY Wallet Type: Medium
Current FY RAD Strategy: Acquire	Previous FY RAD Strategy: Prospec
Current FY RAD Segment: High Acquire	Previous FY RAD Segment: Medium Prospec
	Previous 4 FY Wallet-Total (\$'000) 1000
	Previous 4 FY Wallet Type: Low
	Previous 4 FY RAD Strategy: Retain
	Previous 4 FY RAD Segment: Low Retain

- **RAD Segment** is the result based on the **Wallet type** and **RAD Strategy**, e.g. **High Prospect, Medium Retain**

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Target Prospects | Leads | Uncovered Prospects | **Customer Intelligence**

2. Propensity to buy

Based on the Cisco award-winning propensity to buy model, the probability that the prospect will purchase a given technology in the next six months.

Use wallet size and propensity to buy in combination to prioritize engagements within an account.

- E.g. Is a \$500,000 wallet size with a 10% probability of purchase more or less interesting than a \$100,000 wallet size with a 90% probability of purchase?

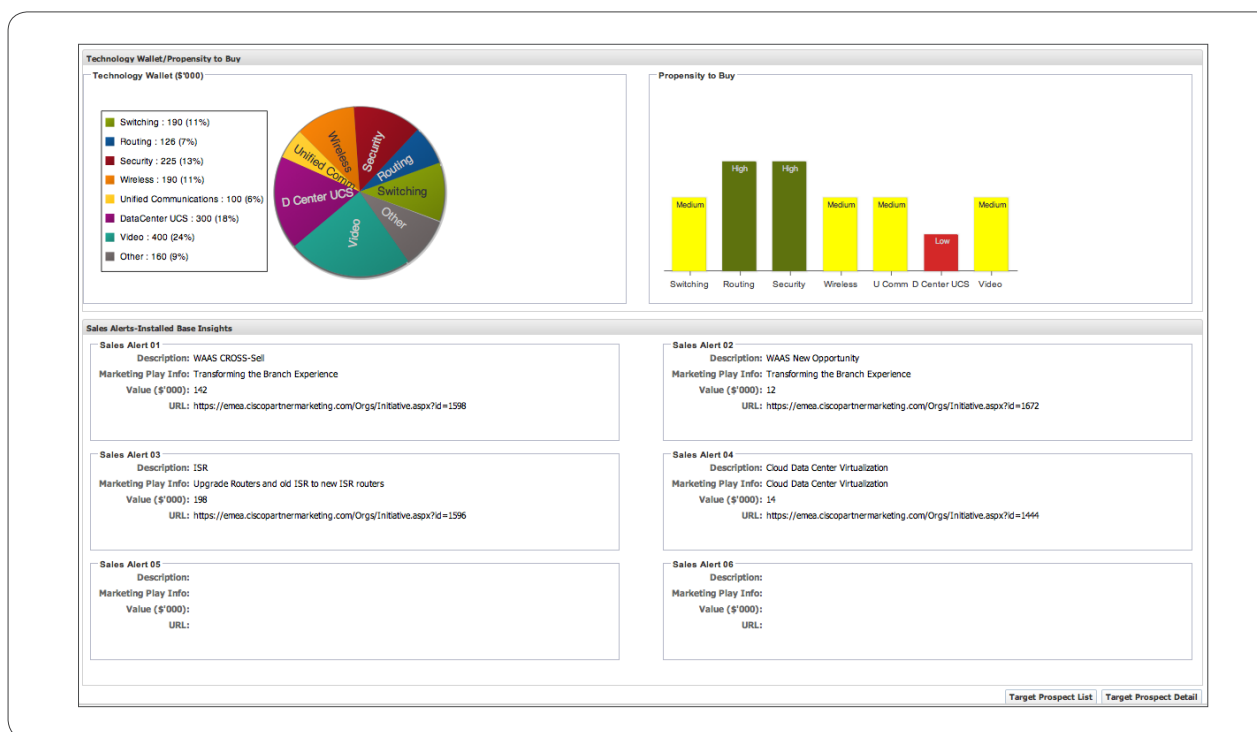
3. Sales alerts with related marketing campaigns

These are business-logic rules analyzed over bookings data to identify potential opportunities within an account for end-of-life, end-of-support, cross-sell, upsell, and migration opportunities.

Use in conjunction with the assigned marketing plays to increase your relevance to the market and partners.

The alerts comprise:

- Description (e.g., Cisco PIX® to Adaptive Security Appliance [ASA] migration)
- Value of opportunity
- Marketing play name (suggested Cisco co-marketing campaign)
- Links to access campaign descriptions and materials



Where available, Customer Intelligence will be attached to Target Prospects, Uncovered Prospects, and Leads supplied to you through the [Platform](#). Availability varies by region. Please ask your Cisco sales contact.

For instructions on how to receive, view, assign, and work with Target Prospects, Leads, and Uncovered Prospects through to Deal in [Cisco Commerce Workspace \(CCW\)](#) go to [Using The Platform](#).

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Partner Admin | Partner Sales Rep | Tracking

Partner Admin Responsibilities

Receive Leads and Target Prospects

Cisco will assign Leads and Target Prospects to your business. Keep in touch with your Cisco sales contact about what is being assigned to your company.

The Partner Admin (PA) either accepts and assigns the account to a Partner Sales Rep (PSR) or rejects it.

For best practice, this is done within 48 hours.

- Go to the Sales Collaboration Platform either from [My Cisco Workspace](#)* or from [Cisco Commerce Workspace \(CCW\)](#).
- A list of Leads and Target Prospects assigned to your company can be seen under the corresponding **Leads** or **Target Prospects** tab.
- To view or update a specific Lead or Target Prospect (including rating the quality of a Lead) select it from the list.
- * If using My Cisco Workspace, you must first have added the Leads & Target Prospects module.
[See page 9.](#)
- **Target Prospects** contain a deadline date by which you will need to take action.
- You will see the expiry date and “age” of the prospect clearly noted, and those expiring within the next 7 days will be highlighted in red.
- You can invoke an automatic extension of 30 days (once only).
- The expiry date is extended by 60 days when the prospect is converted to a new deal.

Leads & Target Prospects

TEST - HP_Test_DF_CCW, ABERDEEN, ABERDEENSH, GB

Sales Collaboration Platform ⓘ

Leads | Target Prospects

Customer Name	Partner Status	Date Added ▼	Main Technology	Budget	ProgramEvent Name	Address Line	City	
XYZ WORLDWIDE LTD	Partner Assigned	29-Mar-2013				test	test	
XYZ WORLDWIDE LTD	Assigned To PSR	13-Mar-2013	Routers	\$1000 - \$4999	Marketing Event 001	Automation pvw	Albania	
XYZ WORLDWIDE LTD	Partner Assigned	13-Mar-2013	Collaboration	\$0 - \$999	Campaign Q1FY13	MG	AFG	
LL & FLING USA	Partner Assigned	15-Feb-2013	Test Technology	\$15,000 - \$2	Marketing FY13	KIT	RESEARCH	

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Partner Admin | Partner Sales Rep | Tracking

Partner Admin Responsibilities

Accept and Assign, or Reject Leads and Target Prospects

1. Click on the Lead or Prospect to open and review the details provided by Cisco.
2. To change, accept and assign, or reject the Lead or Prospect, select **Edit**.
3. To proceed, go to **Assigned Partner Sales Rep** and assign a Partner Sales Rep's name. (If you do not see the PSR listed, see [Enrollment Instructions to Assign Your Salespeople to the Platform](#).)
4. You should now see the Sales Rep's name assigned to that Prospect or Lead.
5. Or, if you will be acting as the Partner Sales Rep yourself, simply change the status from **Partner Assigned** to **Actively Working**. The Prospect or Lead is now assigned to you.
6. To reject a Lead or Prospect, change the **Partner Status** to **reject** with one of the **rejection reasons** given.
7. For Prospects, provide additional details on the rejection reason. For Leads, please leave a **Lead Quality Rating** and **Comment**.
8. The details of the Prospect or Lead will no longer be visible to you.

The screenshot displays the Cisco Sales Collaboration Partner Admin interface. The top section shows the user's role as 'Partner Admin: Nate Johnson' and the account as 'TEST - Intel_Test_DF_CCW'. Below this are tabs for 'Target Prospects', 'Leads', 'My Cisco', and 'Cisco Commerce'. The 'Leads' tab is selected, showing 'Lead Details: Peter Smith'. The details include 'Partner Lead Status: Partner Assigned', 'Lead Owner: PAUL SORGE', 'Total Value (USD): 100000', 'Deal Id', 'Created By: Abhishek Dubey, 15-Mar-2013 10:03 PM', 'Cisco Recommended PSR: Brad Madison', 'Assigned Partner Sales Rep', 'Assigned Partner Sales Rep 2', 'Assigned Partner Sales Rep 3', and 'Last Modified By: PAUL SORGE, 27-Mar-2013 01:17 AM'. An 'Edit' button is visible at the bottom right of the details section.

The bottom section shows the 'Edit Lead' form. It includes a dropdown for 'Partner Lead Status' (currently 'Partner Assigned') and a list of rejection reasons: 'Actively Working', 'Rejected-Invalid Contact', 'Rejected-Already Deal', 'Rejected-Project Cancelled', 'Rejected-Lost to Competition', 'Rejected-Not My Territory/Account', 'Rejected-No Customer Response', 'Rejected-Duplicate', and 'Rejected-No Valid Project'. There are also fields for 'Lead Quality Rating', 'Lead Quality Comments', 'Appointment Date/Time', 'Appointment Type', and 'Contact Department'. The 'Assigned Partner Sales Rep' field is highlighted with a red circle, and the 'Assigned Partner Sales Rep 2' and 'Assigned Partner Sales Rep 3' fields are also highlighted with red circles.

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Partner Admin | **Partner Sales Rep** | Tracking

Partner Sales Rep Responsibilities

View, track, and work assigned Leads and Prospects through the sales cycle, adding notes and attachments throughout the process. Update the status as the Lead or Prospect progresses through the sales cycle from **Actively Working** to **Closed**.

View Leads and Target Prospects

- Go to the Sales Collaboration Platform either from [My Cisco Workspace*](#) or from [Cisco Commerce Workspace \(CCW\)](#).
- Go to the **Leads & Target Prospects** module and view new and existing Leads and Target Prospects under the corresponding tab
- Keep in touch with your Cisco relationship contact about what is being assigned to your company
- Your Leads and Prospects will be immediately visible when your administrator has assigned them to you
- Click on the Prospect or Lead to open and review the information provided by Cisco
- To begin working the Lead or Prospect, select **Edit** and set the status to **Actively Working**
- Add notes and attachments and update the status as soon as it changes through the sales cycle

* If using My Cisco Workspace, you must first have added the Leads & Target Prospects module.
[See page 9.](#)

Partner Lead Status: Assigned To PSR
Total Value (USD): Assigned To PSR
Appointment Date Time:
Lead Quality Rating: --N
Lead Quality Comments:
Assigned Partner Sales Rep: Brad Ma
Assigned Partner Sales Rep 2:
Assigned Partner Sales Rep 3:
Appointment Type: --N
Contact Department:
EDIT

Prospect Expiration

Target Prospects contain a deadline date by which you will need to take action.

- This date will be 15, 30, 60 or 90 days from when the **Target Prospect** was assigned to your company.
- The expiry date and “age” of the prospect is clearly noted and those expiring within the next 7 days are highlighted in red.

- You can invoke an automatic extension of 30 days (once only).
- The expiry date is extended by 60 days when the prospect is converted to a new deal.
- If the **Expiring On** field is blank, there is no expiry date associated with that record.

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Partner Admin | **Partner Sales Rep** | Tracking

Partner Sales Rep Responsibilities

Complete the Sales Process

- If proceeding to deal, enter the **Total Value**, and then click the **Proceed To Deal** button.
- You will be taken to **Cisco Commerce Workspace (CCW)** where you can add additional details as prompted to complete the deal registration process.
- Key information from the original Prospect or Lead record will be pre-populated into CCW to reduce your data entry.
- Follow the existing CCW sales process through to order.
- If there is no opportunity, change the status to **Closed** and provide details of why the Deal did not materialize for the Prospect or Lead.
- To reject the Prospect or Lead, click **Reject** and select a reason.
- For Prospects, provide additional details on the rejection reason. For Leads, please leave a **Lead Quality Rating** and **Comment**.
- The details of the Prospect or Lead will no longer be visible to you.

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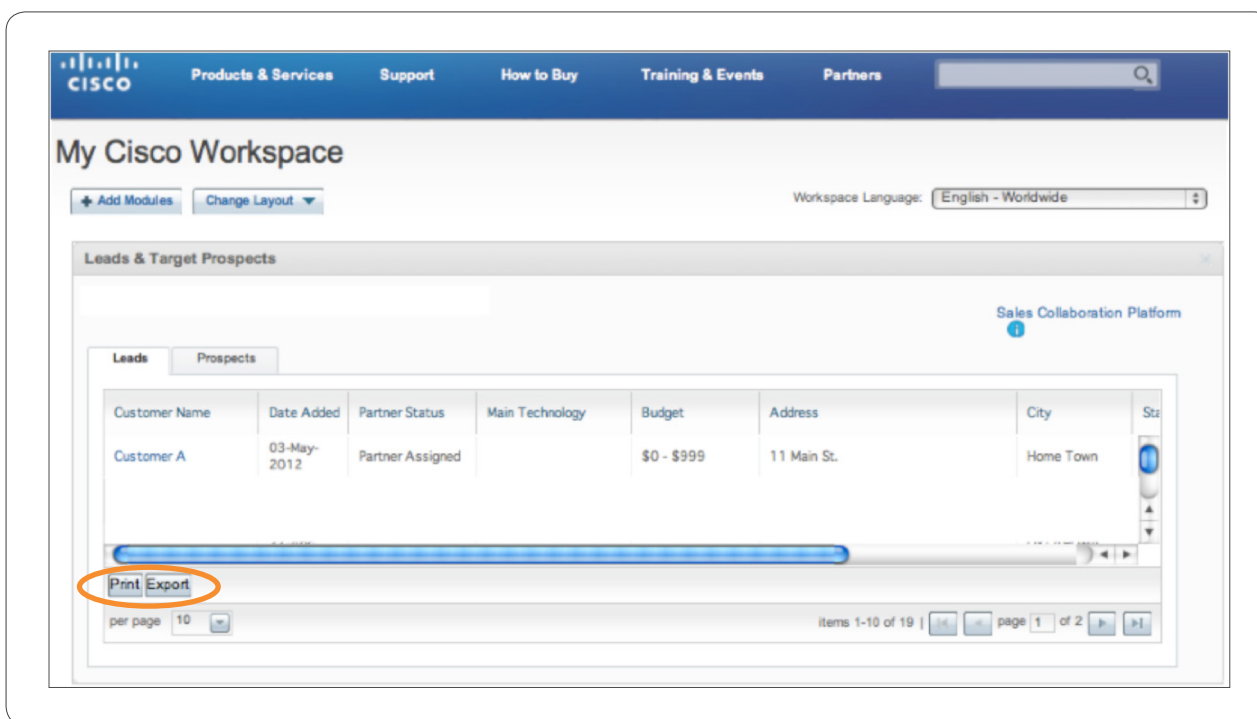
Partner Admin | Partner Sales Rep | **Tracking**

Tracking

Go to the **My Leads & Target Prospects** module in **My Cisco Workspace** and view new and existing Leads and Target Prospects under the corresponding tab.

To download the data, click **Export** or **Print**.

Your Cisco sales contact has access to reporting so please ask if you are interested in receiving reports.



Need Help?

For technical support with this process, please contact the [Partner Relationship Team \(PRT\)](#).

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Cisco Sales Collaboration Mobile: SCP Mobile



Now, you can take this powerful tool with you wherever you go, using the innovative, new Cisco Sales Collaboration Mobile app for mobile devices.

SCP Mobile is an extension of your desktop, enabling you to get closer to prospects and leads with powerful mobile features such as GPS maps, automatic updates, and favorites.

SCP Mobile will work on iPhones, iPads, Android smartphones and Android tablets; first in English, with 16 other languages being added during 2013.

Registered users of the Sales Collaboration Platform can go to the [Apple App Store](#) or [Google Play Store](#) and search for SCP Mobile. Install the app using your iTunes or Google Play credentials.

For your security, your Cisco.com authentication is required to log in. You'll find a familiar, easy-to-navigate experience, starting with the **Recent** screen. Toggle between **Leads**, **Prospects**, and **All** views and see the status of each record.

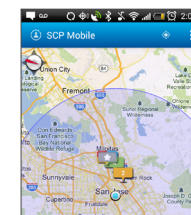
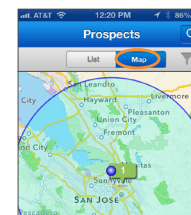
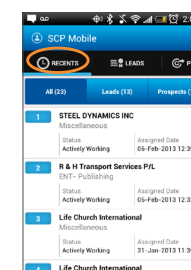
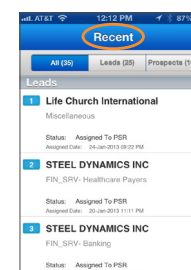
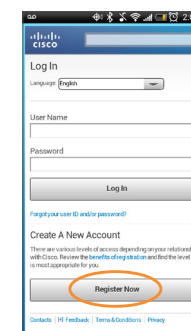
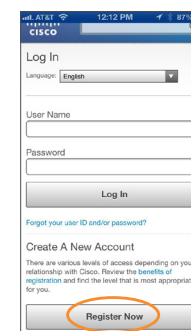
Select **Leads** or **Prospects** in the bottom navigation, toggle to the **Map** view, and you'll see all the leads and prospects on a clear, easy-to-follow GPS map. If you're using a tablet, you can also see **List** and **Map** views side-by-side for added convenience.

Whichever view you choose, you'll find all the information at your fingertips. Just tap on the record to get a complete overview. You can also search and filter prospects and mark **Favorites** by tapping the star.

Continued on next page

iOS

Android



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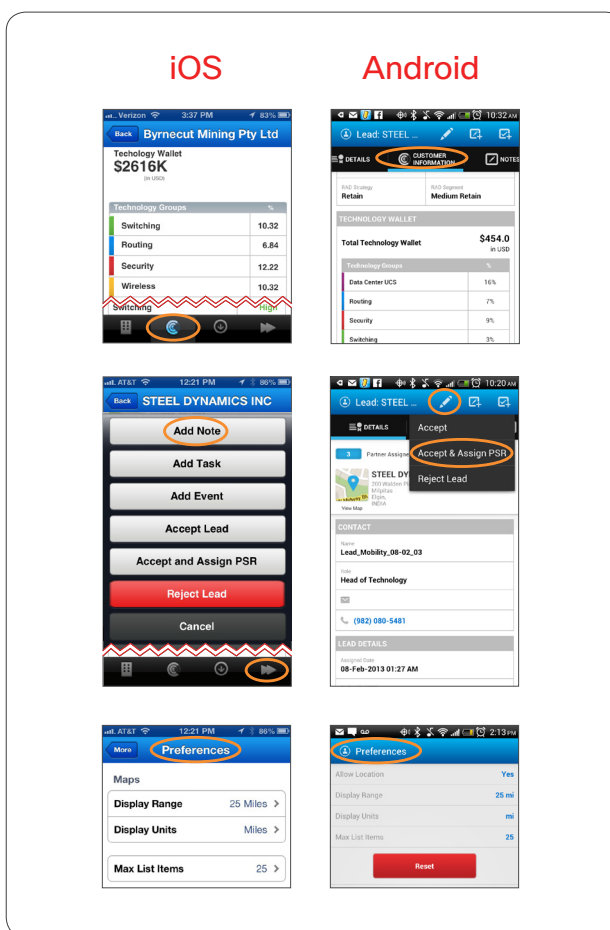
You want every advantage you can get when it comes to generating new business. Tap the **Target** icon to view **Customer Intelligence** data about your customers and prospects (when available) to give you a competitive edge when engaging a new prospect.

It's easy to add **Notes**, **Tasks**, and **Events** on the go, so you can keep all communication about a record in one place, instead of in multiple emails. Just tap a record, then tap the **Action** button. You can also **Accept** or **Reject** Leads and Prospects, and Partner Administrators can **Assign** them to a sales representative in the usual way. All updates are available in real time back at your desk.

SCP Mobile is customizable to match the way you do business. Set your **Preferences** for **Display Range** and **Units**, and the list of items you want to see on each screen you access.

Then from your desk, you'll enter the deal and close the business in [Cisco Commerce Workspace \(CCW\)](#). With one click to CCW, it's fast and easy.

Just because you're away from the office, doesn't mean you need to be away from the Cisco Sales Collaboration Platform. Download SCP Mobile today and see how far it can take your business.



Need Help?

See the **Help** section in SCP Mobile. Contact SCP Mobile email support: scp-mobility-support@cisco.com

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Glossary

Cisco Commerce Workspace (CCW)

An integrated quoting platform that enables partners to: register deals; configure and price products, software, and related services; submit orders.

Customer Intelligence (CI)

Customer information based on an analysis of installed base data and intelligent predictive models. It includes for each Cisco technology, the company/account's: (1) estimated wallet size – potential technology spend, (2) the prospect's propensity to buy technologies or solutions, and (3) sales alerts with related marketing campaigns.

Deal

A partner sales opportunity, registered in **CCW**, for which the partner has confirmed the dollar amount, technology, timeframe, and pricing.

Lead (BANT criteria)

A company/account that has expressed interest in a Cisco product or service and is qualified as to budget, need, and timeline. (See the [Leads](#) page for details of sub-categories also used.)

Leads & Target Prospects Module

Enables partners to access the Sales Collaboration Platform from My Cisco Workspace or Cisco Commerce Workspace (CCW).

My Cisco Workspace

A customizable workspace designed to improve partner productivity. Add modules from a catalog and get immediate access to the business applications and information you use most frequently.

Partner Led

Cisco's go-to-market model that empowers and rewards Cisco Partners to lead customer engagements in mid-sized and small businesses.

Partner Program Enrollment (PPE)

Partner Administrators use this tool to enroll the partner company in the Sales Collaboration Platform.

Partner Self-Service (PSS)

Partner Administrators use this tool to grant access to Partner Sales Reps (PSRs) and other employees.

Sales Collaboration Mobile: SCP Mobile

The mobile app for the Platform, available on Apple iPhones and iPads and Android smartphones and tablets.

Sales Collaboration Platform

A global platform integrated with Cisco Commerce Workspace (CCW), and designed to accelerate collaboration efforts between partner sales teams and Cisco sales teams.

Target Prospects

A company/account that, based on intelligence and analytics, that has a high potential to generate an opportunity for one or more technologies or solutions.

The Sales Collaboration Partner Admin (PA)

The person identified to enroll the partner company in the Sales Collaboration Platform and grants access to other employees/contacts. They could be a Sales Manager, Sales Rep, or Sales Administrator and are responsible for accepting/rejecting, and assigning leads and target prospects to Partner Sales Reps (PSRs). The Partner Admin can also perform the functions of the Partner Sales Rep. A partner can have several PAs.

The Sales Collaboration Partner Sales Reps (PSRs)

Salespeople at the partner company. They accept/reject, update and convert leads and target prospects in the Sales Collaboration Platform, collaborate on opportunities with their Cisco Sales contact and enter deals in CCW.

Uncovered Prospects

A company/account that, based on intelligence and analytics, has little or no Cisco purchase history but has potential for a specific technology or solution.

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Support

Please talk to your Cisco relationship contact; the Platform is designed for you to work together.

For Technical Support Using the Platform

- Please contact the [Partner Relationship Team \(PRT\)](#)

For Technical Support Using SCP Mobile

- See the [Help](#) section in SCP Mobile.
- Contact SCP Mobile email support: scp-mobility-support@cisco.com

Information, Training, and Videos

- View and/or download resources at [Cisco Sales Collaboration Platform](#) (on [Partner Central](#)).