



Your Ready•Check and Road•Map to Success

Vistex **Ready•Check** and **Road•Map** solutions provide critical insight into the technology infrastructure required for a company's sales and marketing programs. Today's organizations want a single view of all program data in order to effectively manage their channel programs. If you are faced with implementing or scaling program capabilities with your existing technology environment, but you don't know where to start, that's where we come in! Vistex provides the architecture and guidance to enable your CRM platform to support your marketing, incentive, and channel programs. And how do we do that? We offer **Ready•Check** and, if needed, **Road•Map** services that enable organizations to go from current state to best in class.

READY•CHECK

A high-level review and assessment of a CRM environment's readiness to support all pricing, rebates, trade, and partner programs compared to industry best practice.

ROAD•MAP

An in-depth, actionable plan (inclusive of all **Ready•Check** deliverables) that enables your CRM environment to support your sales and marketing objectives. Defined initiatives bridge the gap between current and future states.

Some Common Signs You Need a **Ready-Check** or **Road-Map**

There are multiple red flags you may encounter that block effective implementation of marketing programs, including inaccurate data, lack of a portal that provides program information to partners and customers, or the inability to integrate with other platforms. Here are just some of the challenges that may seem familiar:

- ✓ Inability to implement the program capabilities you need in your CRM environment
- ✓ Inability to scale programs to support your growth targets using existing technology and processes
- ✓ Launching an indirect channel and needing to understand the systems and processes required for success
- ✓ Being new to CRM and wanting to ensure smart investments in infrastructure
- ✓ Managing multiple systems and tools that agents, partners, and suppliers need to access but none of them seem to “talk together” or have integrated data

How Does it Work?

A **Ready-Check** evaluates your CRM environment’s readiness to support strategic programs and assesses alignment with industry best practices. Our experts work with you to audit current programs and tools and identify opportunities to streamline and consolidate operations, improve capabilities, find efficiencies, and gain flexibility – initiatives that often result in positive budget impacts.

A **Road-Map** delves deeper and defines a plan of action. This program includes everything in the discovery from **Ready-Check** – going beyond a system assessment and effectiveness scorecard to interviewing users of those systems.

1. Analyzing what they do and how they do it
2. Determining the gaps and uncovering the challenges
3. Defining the opportunities to fix what is inherently broken

READY-Check



Discovery

Assess CRM environment through interviews



Define Current State

Document state of current environment



Future State

Define future state wish list based on best practices



Gap Analysis

Analyze gaps, obstacles, opportunities, & technology options



Findings

Report observations and recommend opportunities

ROAD-Map



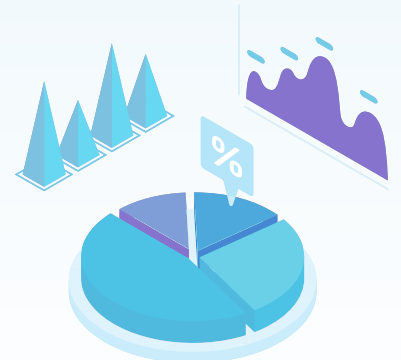
Ready-Check Insights

Full discovery and assessment included from **Ready-Check**



Road-Map


Plan outlined via **Road-Map** typically spanning a 1 - 3 year planning horizon



READY Check

ROAD MAP

All Ready•Check deliverables **PLUS:**

<h3>Discovery</h3>	<ul style="list-style-type: none"> ■ Discovery Guide ■ Discovery Workshop <ul style="list-style-type: none"> • 1-day onsite with key stakeholders ■ Assess Vendor CRM Environment <ul style="list-style-type: none"> • Partner data model (high-level) • Portal technologies • Tools & apps • Data stores • Integrations (key) 	<ul style="list-style-type: none"> ■ Discovery Workshop <ul style="list-style-type: none"> • Follow up with remote interviews as needed ■ Assess Vendor CRM Environment <ul style="list-style-type: none"> • Partner data model (detailed) • Integrations (all) • Partner lifecycle management business processes • Lead to opportunity business processes • Opportunity to order business processes
<h3>Current State</h3>	<p>Current State CRM Systems Diagram</p>	
<h3>Future State</h3>	<ul style="list-style-type: none"> ■ Future State CRM Systems Diagram <ul style="list-style-type: none"> • Based on industry best practice 	<ul style="list-style-type: none"> ■ Future State CRM Systems Diagram <ul style="list-style-type: none"> • Based on industry best practice and vendor goals
<h3>GAP Analysis</h3>	<ul style="list-style-type: none"> ■ Identify Gaps Between Current and Future State Environments ■ Identify Obstacles and Opportunities to Closing Gaps 	<ul style="list-style-type: none"> ■ Identify Technology Options to Close Gaps
<h3>Findings</h3>	<p>Written Report Documenting the Assessment, Gaps, and Recommendations</p> <p>Stakeholder Presentation to Review Findings and Recommendations</p>	
<h3>Roadmap</h3>		<ul style="list-style-type: none"> ■ Identified Gaps are Organized into Project Initiatives ■ High-Level Scope and Effort Defined for Each Project ■ Projects are Prioritized and Consolidated on a 1 - 3 Year Planning Horizon
<h3>Timeline</h3>	<ul style="list-style-type: none"> ■ Ready•Check Discovery Takes Place Over a Period of 4 - 6 Weeks 	<ul style="list-style-type: none"> ■ The Full Road•Map is Inclusive of Ready•Check and Takes Place Over the Course of 8 - 12 Weeks

What are the Benefits for Your Company?

This program zeroes in on the key steps necessary to move from your current state to a simplified and rationalized CRM environment. The benefit: running your marketing programs more effectively, measuring them more accurately, and doing it all at scale. Our services provide the architecture, foundation, and guidance to enable your CRM platform to support the infrastructure and solutions needed. The result is a 360-degree view of your business and exceptional insight into your programs – often with significant simplification of your technology environment. **With Vistex CRM Insights, now it all adds up!**

Solutions Impact These Key Areas:



Data

- Establishes CRM as the system of record for managing partner data
- Streamlines the process for partner recruitment, registration, qualification, onboarding, and activation
- Enables self-service tools by which partners can update their profiles managed in CRM
- Provides a governance model for managing partner data and data quality



Portal

- An enterprise-class portal with a streamlined user experience where partners can access the content and tools necessary to do business with your organization
- Offers administrative tools and approval workflows for publishing/updating portal content and assets (files)
- Delivers portal content, assets, and tools to partners based on partners' CRM profile



Integration

- Supports a standards-based framework into which affiliated tools and applications can be efficiently integrated and includes:
 - Seamless partner experience via brand standards & Single Sign-On (SSO)
 - Core partner profile data sharing across apps
 - Does not create unique system integration points

About Vistex®

Vistex solutions help businesses take control of their mission-critical processes. With a multitude of programs covering pricing, trade, royalties and incentives, it can be complicated to see where all the money is flowing, let alone how much difference it makes to the topline and the bottomline. With Vistex, business stakeholders can see the numbers, see what really works, and see what to do next – so they can make sure every dollar spent or earned is really driving growth, and not just additional costs. The world's leading enterprises across a spectrum of industries rely on Vistex every day to propel their businesses.

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