



Marketing Velocity Central Lead Management Training

FY21 Program Update

Partner Marketing

May 2021

Agenda

- Marketing Velocity Central Lead Management Overview
- New Lead Model
- Marketing Velocity Central
 - Managing Leads – What’s New
 - Leads Storage
 - Leads Upload Demo

Cisco and Partners Co-marketing Demand



In an effort to simplify the partner marketing lead sharing model, [Leads and Prospects](#) will be sunseting.



Retiring some of the clunky lead upload processes and [centralizing partner lead management](#) within Marketing Velocity Central.



Maintain process to support lead flow for [Proof of Performance and co-marketing generated leads](#).

New partner-generated lead sharing model



Simplified Processes

Eliminating LandP/SFDC and reducing lead up requirements such as assigning partner sales reps and lead status.



Secure Data Sharing

Eliminating the requirement for PII on leads and streamlining data architecture for more secure contact sharing while continuing to measure marketing revenue.



Centralized Tools

Centralizing marketing campaigns, funds manager and co-marketing leads within Marketing Velocity
Central for easier marketing with Cisco

Managing Leads in Marketing Velocity Central

Because most of our partners already have access to Marketing Velocity Central, this change in platforms is a seamless transition.

1

Access Marketing Velocity Central

Navigate to marketingvelocitycentral.cisco.com to view your leads that used to be in Leads and Prospects. Don't have an Marketing Velocity Central account? No problem. Your account will be automatically created when you access the URL above. New Users will need CCO ID to access Marketing Velocity Central.

2

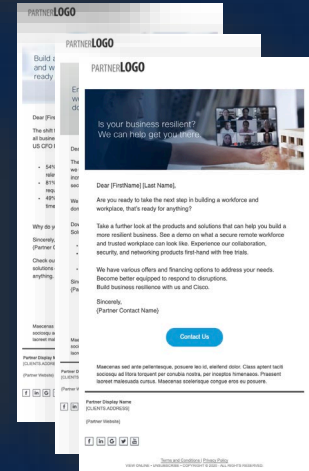
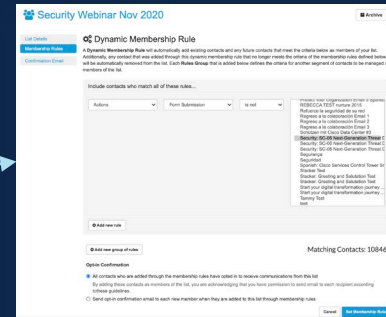
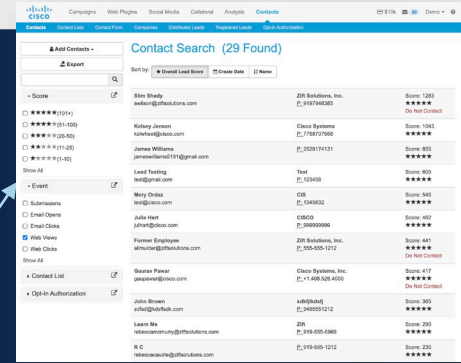
View Your Leads

Once in the platform, you can access your co-marketing leads via the main navigation or the homepage shortcut as seen here.

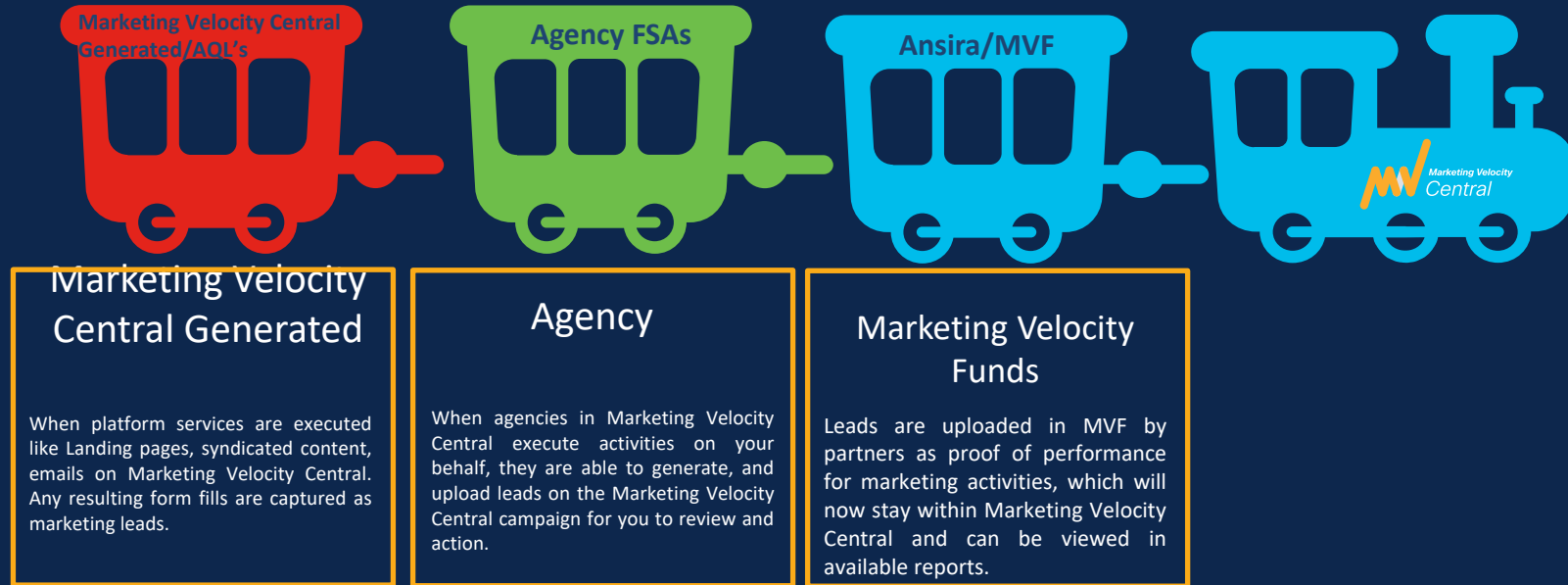
3

Create Contact Lists and activate campaigns

Ready for more? Accelerate your demand by creating contact lists with your leads and activating an email campaign.



Lead Management Use Cases



Leads Demo

1. Marketing Velocity Central Generated Leads
2. Marketing Velocity Funds Generated Leads

Marketing Velocity Central Generated Leads

- Leads generated from the activated content within the Marketing Velocity Central co-branded campaigns
- Leads are captured via form submissions on syndicated content
 - Form Fill: any submission from a standard marketing form from an email, landing page or social media
 - Event Registration: any submission from a webinar offered in Marketing Velocity Central
- All Marketing Velocity Central forms have the following required fields:
 - First Name
 - Last Name
 - Email
 - Company
 - Country

The image shows a landing page for Cisco SD-WAN. At the top, there's a header with logos for Bing, Tech, and Cisco. The main content area features a large image of a city at night with the text: "Cisco SD-WAN Connect any user to any application with integrated capabilities for multcloud, security, unified communications, and application optimization." Below this is a "See 5 use cases for SD-WAN" button. The "Features and Benefits" section includes four icons: "Predictable app experience", "Right security, right place", "Simplify an enterprise scale", and "Optimized choice and control". A "Contact" form is overlaid on the page, containing fields for First Name, Last Name, Email Address, Company, Country, Title, Phone Number, and Company Size. It also includes a "Comments Box" and a "Submit" button. At the bottom of the page, there's a section for "Cisco DNA Software Fuels the Intent-Based Network" with a "Cisco DNA for SD-WAN and Routing" button.

Marketing Velocity Central Generated Leads

1. Proceed to [Leads](#)
2. Select [Leads](#)
3. Select the contact for lead conversion

The screenshot displays the Cisco Marketing Velocity Central interface. The top navigation bar includes the Cisco logo, menu items for Campaigns, Web Plugins, Social Media, Collateral, Analysis, Leads (highlighted), and Webinar, and a notification bell with '6' and 'APJ'.

The main content area is titled 'Contact Search (3 Found)'. On the left, there are buttons for 'Add Contacts', 'Export', and a search input field. Below these is a 'Score' filter dropdown with the following options:

- ★★★★★(101+)
- ★★★★★(51-100)
- ★★★★★(26-50)
- ★★★★★(11-25)
- ★★★★★(1-10)

Below the filter is a 'Show All' link and an 'Event' button. The search results are sorted by 'Overall Lead Score' and show a table of 3 contacts:

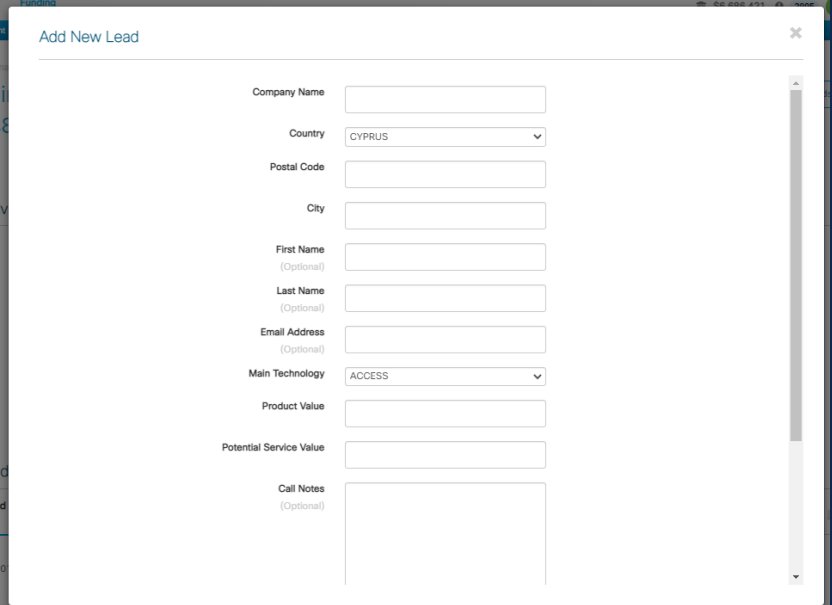
Name	Company	Score
Matthew Lee matlee2@cisco.com	Cisco Systems, Inc. P: +1.408.526.4000	Score: 6 ★★★★★
Raquel Ayala raqayala@cisco.com	Cisco Systems, Inc. P: +1.408.526.4000	Score: 3 ★★★★★
Junko Kanoh jkanoh@mktg-gbs.com	mktg-gbs.com	Score: 3 ★★★★★

A yellow notification banner at the top of the results area states: 'File import started at Apr 1, 2021 5:11:41 AM. 7 Contacts were successfully imported. There were 3 failures. You can download failed rows by following this link.'

Marketing Velocity Funds Generated Leads

1. Activate the “Custom Marketing Activity Upload for Partner Generated Leads”
2. Partner uploads leads against a Marketing Velocity Funds activity
3. Using partner Activity ID to import leads into partner Marketing Velocity Central account
4. Leads appear in partner Marketing Velocity Central account in the “Custom Marketing Activity Upload for Partner Generated Leads” campaign

*Leads can be viewed in Marketing Velocity Central within 12 hours.

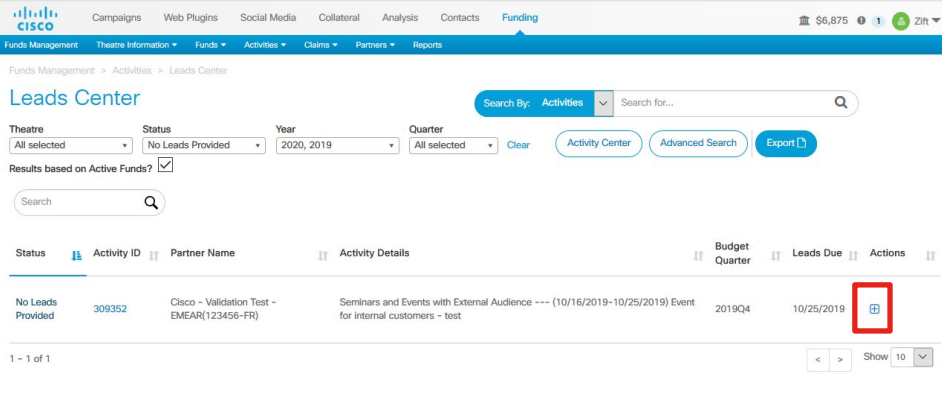
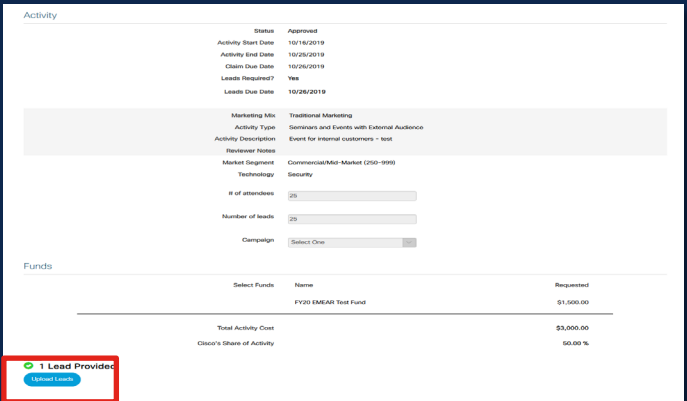
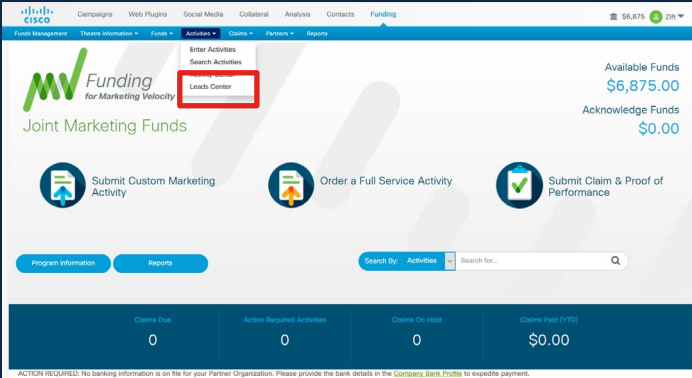


The screenshot shows a web form titled "Add New Lead" with the following fields:

- Company Name: Text input field
- Country: Dropdown menu with "CYPRUS" selected
- Postal Code: Text input field
- City: Text input field
- First Name: Text input field with "(Optional)" below it
- Last Name: Text input field with "(Optional)" below it
- Email Address: Text input field with "(Optional)" below it
- Main Technology: Dropdown menu with "ACCESS" selected
- Product Value: Text input field
- Potential Service Value: Text input field
- Call Notes: Text area with "(Optional)" below it

Accessing the Lead Center to Submit Leads

- The Lead Center Can be accessed 3 ways:
1. From the Marketing Velocity Central Home Page fund manager
 2. From the 'Activities' Menu on the Funding Manager Home Page
 3. From within the Activity View



Uploading Leads for Activities Requiring Proof of Performance

Secure Mobility for A Digital World
Start your transition to next-generation mobility with Wi-Fi 6

Activate campaigns
• Launch email journeys
• Explore and order full service activities
• Manage campaign tasks 1

Explore social media
• Connect social media accounts
• Select technology focus areas
• Personalize and pre-schedule posts

Switch on content syndication
• Syndicated content on your website
• Discover easy-to-install web plugins
• Explore showcases with tracking

Manage funds
• Manage funds
• Manage claims
• Manage pending tasks 1

Invest and manage your funding for Marketing Velocity

Program/Fund type	Allocations	Available balance		
Impact Incentive EMEAR	\$0.00	\$0.00	Act on this fund ▾	Review pending tasks 1 ▾
JMF EMEAR FY19	\$0.00	\$0.00	Act on this fund ▾	Review pending tasks 1 ▾
JMF EMEAR FY20	\$12,200.00	\$6,875.00	Act on this fund ▾	Review pending tasks 1 ▾ New! set electronic payment preferences (opt) 1 Activities pending leads 1
TOTAL	\$12,200.00	\$6,875.00		

Order Full Service Activity

Did you know? You can fund a full service activity from a Cisco selected marketing agency to generate leads and pipeline.



Log into **Marketing Velocity Central**
<http://marketingvelocitycentral.cisco.com>

Use your Cisco.com Username and Password

The fund manager is found on the Marketing Velocity Central homepage

Select 'Activities Pending Leads' from the menu available under 'Review Pending Tasks' to access the **Lead Center** in the fund manager

Uploading Leads for Proof of Performance in Demand Generation Activities

1

2

Drag & drop file(s) to this section, or click here to browse

Validate

Once you arrive on the Lead Submission Page there are 2 options for loading leads.

1. Loading leads individually by completing a form
2. Loading multiple leads by completing and uploading a spreadsheet

Before providing any leads partners must acknowledge Cisco and Partner Data Protection terms

Cisco & Partner Data Protection Terms (View full terms section)

Partner Acknowledgment:

Partner understands that any customer contact data uploaded to Funds Manager/Partner Marketing Central (PMC) by Partner is not owned by Cisco and shall remain the sole property of the Partner, unless otherwise indicated. Partner is aware that any customer contact data uploaded to PMC will be used by Cisco for the purposes of Partner account management. By uploading customer contact data to PMC, Partner represents that Partner is only providing customer contact data that is necessary for the purposes for which Cisco shall use such customer contact data.

This effort is to better orchestrate customer experiences with strategic partners and the object is to benefit customers, our partners, as well as Cisco.

The terms described in the "full terms" and this summary apply to Partner's use of this tool.

By continuing to use this tool, you are giving consent to the updated terms.

I acknowledge

Cisco & Partner Data Protection Terms

Any customer contact data uploaded to Funds Manager/Partner Marketing Central by Partner is not owned by Cisco and shall remain the sole property of the Partner, unless otherwise indicated. Partner understands that any customer contact data uploaded to PMC will be used by Cisco for the purposes of measuring marketing sourced revenue. By uploading customer contact data to PMC, Partner represents that Partner is only providing customer contact data that is necessary for the purposes for which Cisco shall use such customer contact data.

Partner is aware of the purposes for which Cisco will use such customer contact data and understands and acknowledges that Cisco will not use the customer contact data for marketing purposes (unless separate permission for the customer contact data already exists, including but not limited to, being present in Cisco's marketing database) without obtaining separate permission from Partner. As stated above, Cisco intends to use this data for measuring marketing sourced revenue. This effort is to better orchestrate customer experiences with strategic Partners and the object is to benefit customers, our Partners, as well as Cisco.

In order for Cisco to do this properly, fairly, and with the utmost transparency, Partners that organize marketing activities with Cisco must comply with GDPR and other applicable requirements.

Validate

Uploading Leads: Option 1 – Submitting leads individually via a form
Simply select the ‘Add New Lead’ button when the form is complete

Please pay attention to the Lead Requirements listed.

Mandatory information is marked with an asterisk
Email Address is optional but is also a unique identifier for contacts in Marketing Velocity Central to enable Cisco.com shared analytics
Country and Main Technology must be selected from the available menu

Requirements For a successful file upload, your Microsoft Excel file must include the template headers and the following data in the specified format and order:

- Column A: Company Name *
- Column B: Sales Rep CCO ID (recommend providing to save your company lead admin work and cut down on emails from Cisco Leads & Prospects platform)
- Column C: Country *
- Column D: Postal Code * (countries without postcodes exempt)
- Column E: City *
- Column F: First Name *
- Column G: Last Name *
- Column H: Email
- Column I: Main Technology *
- Column J: Potential Product Value – Whole Number USD, No decimals. (Must provide at least a product or service value if not both)
- Column K: Potential Services Value – Whole Number USD, No decimals. (Must provide at least a product or service value if not both)
- Column L: Call Notes

Next, upload your completed file. Once the green checkmark confirming successful file upload appears, click the final upload button to submit. Only one file can be uploaded at a time with no partial file uploads. If errors are encountered a validation message will be shown with details on any corrections needed.

Submit Quick Claim ✕

Currently, no Claims have been submitted for this Activity.

The Claim Deadline for this Activity is 10/26/2019.

Proceed with Quick Claim Entry.

Submit

Or edit claim details before submission.

Edit

Uploading Leads: Option 2 – Uploading multiple leads via the lead upload template

Leads

Lead ID	Sales Rep	Company	City	Name	Technology	Product Value	Service Value	Edit
121700	joe.blogs	Company ABC	Paris	Joe Blogs	CONTACT CENTER	\$30000	\$50000	

Submit Leads via File [Download Template](#)

Requirements For a successful file upload, your Microsoft Excel file must include the template headers and the following data in the specified format and order:

- Column A: Company Name *
- Column B: Sales Rep CCD ID (recommend providing to save your company lead admin work and cut down on emails from Cisco Leads & Prospects platform)
- Column C: Country *
- Column D: Postal Code * (countries without postcodes exempt)
- Column E: City *
- Column F: First Name *
- Column G: Last Name *
- Column H: Email
- Column I: Main Technology *
- Column J: Potential Product Value - Whole Number USD, No decimals. (Must provide at least a product or service value if not both)
- Column K: Potential Services Value - Whole Number USD, No decimals. (Must provide at least a product or service value if not both)
- Column L: Call Notes

Next, upload your completed file. Once the green checkmark confirming successful file upload appears, click the final upload button to submit. Only one file can be uploaded at a time with no partial file uploads. If errors are encountered a validation message will be shown with details on any corrections needed.

[Drag & drop file\(s\) to this section, or click here to browse](#)

1. First download the template. You must download a new template each time you want to load new leads into and Activity. The template cannot be saved and used for other activities
2. Drag and drop the completed template into the window provided or select browse to upload from a saved folder on your computer.
3. Only select data from the menus provided when completing the template
4. Once the lead file is loaded, you must still select the 'Validate' button to confirm that the template has been completed correctly.
5. If there are errors in the template loaded, the upload will fail and an error message will be displayed. Delete the file and follow instructions

A	B	C	D	E	F	G	H	I	J	K	L	M
Company Name	Sales Rep CCD ID	Country	Postal Code	City	First Name	Last Name	Email	Main Technology	Product Value	Potential Service Value	Call Notes	
Company ABC	joe.blogs	FRANCE	12345	Paris	Joe	Blogs	joe.blogs	CONTACT CENTER	30000	50000	BANT	

[Drag & drop file\(s\) to this section, or click here to browse](#)

test lead training.xlsx
554202 (1 KB)

Action	Upload Date	File	Description	Size (MB)
✘	10/16/2019 8:14:43 AM	View File	test lead training.xlsx	0.02

1 - 1 of 1

[Validate](#)

✘ 10/16/2019 8:14:43 AM [View File](#) test lead training.xlsx 0.02

1 - 1 of 1

The file has been processed. The following errors were found while processing the file. Please fix these errors outlined below and upload the file again. No data has been loaded into the system.

Data on file not found in system:

Postal Code is required. Please update and upload again.

Country not found. Please confirm all countries entered have the full name and are within the applicable country cluster. To see list of countries in the applicable country cluster, click Column C: Country hyperlink for a filtered list.

[Validate](#)

Editing Uploaded Leads and Support in Marketing Velocity Funds

Lead ID	Sales Rep	Company	City	Name	Technology	Product Value	Service Value	Edit
121700	joe.blogs	Company ABC	Paris	Joe Blogs	CONTACT CENTER	\$30000	\$5000	<ul style="list-style-type: none">Need Help?EditDelete

Download Template

Edit Lead Data

Loaded leads can be deleted or edited if errors are detected after they are submitted.

However, leads are transferred from the fund manager into a campaign in Marketing Velocity Central every 12 hours. Leads edited after this timeframe will need to be updated in Marketing Velocity Central directly.

Note: If you encounter technical errors when submitting leads, please contact the help desk at: ciscojmf@ansira.com

Updating Marketing Velocity Central Generated Leads

- 1. Update Lead Status
- 2. Edit Lead Details
- 3. New Opportunity

Leads / Eugene Chee, Test3 / Initial interaction

Eugene Chee, Test3

Initial interaction

Update Status \$ New Opportunity Assign

20
Email Opens

4
Email Clicks

0
Web Views

0
Web Clicks

0
Submissions

Lead Information [View Contact](#)

Email : euchee@cisco.com
First Name : Eugene
Last Name : Chee
Title : Test3
Company : Cisco Systems USA
Work Phone : 81390579
Mobile Phone : 81390579
Country : SG
Source : Electronic Direct Mail
Opt-In Authorization : Authorized for selected communications

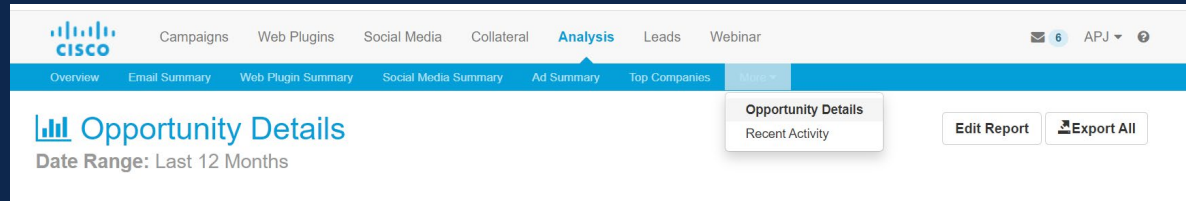
Score: 0
★★★★★

Additional Supplier Profile Fields [Edit Lead Fields](#)

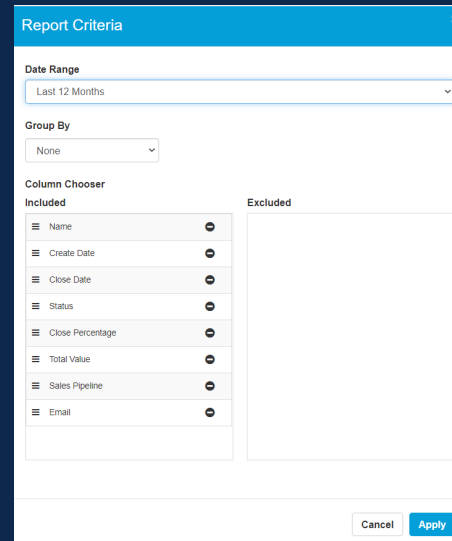
Create Date: Oct 22, 2019 12:20:33 PM Update Date: Jul 16, 2020 1:28:51 PM

Marketing Velocity Central Leads Report – Available next quarter

1. Go under **Analysis**
2. Select **More** and **Opportunity Details**
3. Select on **Edit Report** to filter the report criteria
4. Select **Export All**



The screenshot shows the Cisco Marketing Velocity Central interface. The top navigation bar includes 'Campaigns', 'Web Plugins', 'Social Media', 'Collateral', 'Analysis', 'Leads', and 'Webinar'. The 'Analysis' tab is active, and a dropdown menu is open showing 'Opportunity Details' and 'Recent Activity'. The main content area displays 'Opportunity Details' with a 'Date Range: Last 12 Months' filter. There are 'Edit Report' and 'Export All' buttons on the right side.



The 'Report Criteria' dialog box is shown, allowing users to configure report parameters. It includes a 'Date Range' dropdown set to 'Last 12 Months', a 'Group By' dropdown set to 'None', and a 'Column Chooser' section. The 'Column Chooser' has two columns: 'Included' and 'Excluded'. The 'Included' column contains the following fields: Name, Create Date, Close Date, Status, Close Percentage, Total Value, Sales Pipeline, and Email. The 'Excluded' column is currently empty. 'Cancel' and 'Apply' buttons are located at the bottom right of the dialog.

Why do we ask for your leads? Where are they stored?

- When Cisco co-funds demand generation activities or jointly executes campaigns with partners, we require leads for proof of performance to measure pipeline generated
- Your lead data is stored in 3rd party cloud based platforms which have undergone rigorous security testing and are not connected with Cisco's direct marketing database.
- In this new sharing model, Cisco no longer requires personally identifiable information (PII) on partner leads
- In the instance it is provided, it is the partner's responsibility to manage their customer PII within these platforms in accordance with local data protection regulations (GDPR, CCPA, CASL, etc.).



Your customer data is not being collected by Cisco for direct marketing or communication purposes.

What's next?



There is no action required of you as part of this change other than to understand that your leads are now stored in Marketing Velocity Central instead of Leads and Prospects. If you do not have a Marketing Velocity Central account, simply access the link below to create an account.

You can get started by navigating to marketingvelocitycentral.cisco.com to see your leads.

If you have questions, please contact
APJC: apj_partner_comms_team@cisco.com
AMER: amer_partner_digital@cisco.com
EMEAR: partner_marketing_emea@cisco.com



*Marketing
Velocity*

