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 sunsetting.

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

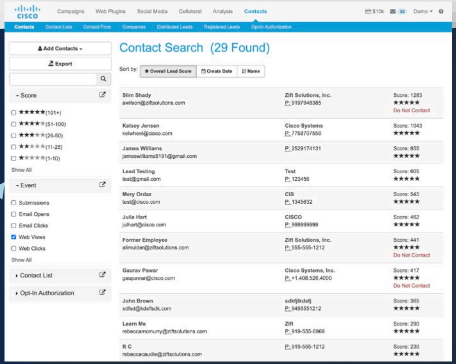
Navigate to marketingvelocitycentral.cisco.com to view your leads that used to be in Leads and Prospects. Don't have an Marketing Velocity Central account? No problem. Your account will be automatically created when you access the URL above.
New Users will need CCO ID to access Marketing Velocity Central.

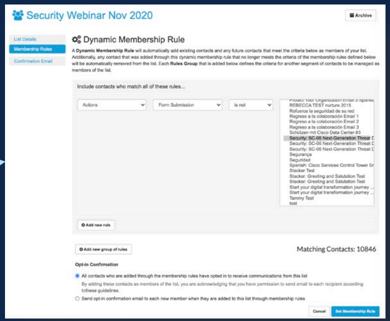
2 View Your Leads

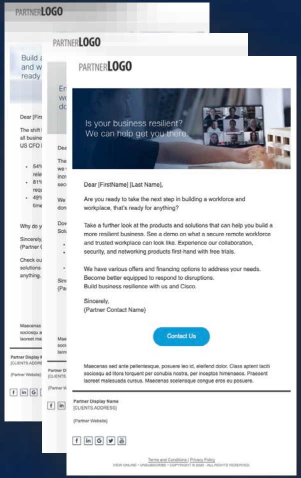
Once in the platform, you can access your co-marketing leads via the main navigation or the homepage shortcut as seen here.

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

Marketing Velocity Central Generated

When platform services are executed like Landing pages, syndicated content, emails on Marketing Velocity Central. Any resulting form fills are captured as marketing leads.

Agency

When agencies in Marketing Velocity Central execute activities on your behalf, they are able to generate, and upload leads on the Marketing Velocity Central campaign for you to review and action.

Marketing Velocity Funds

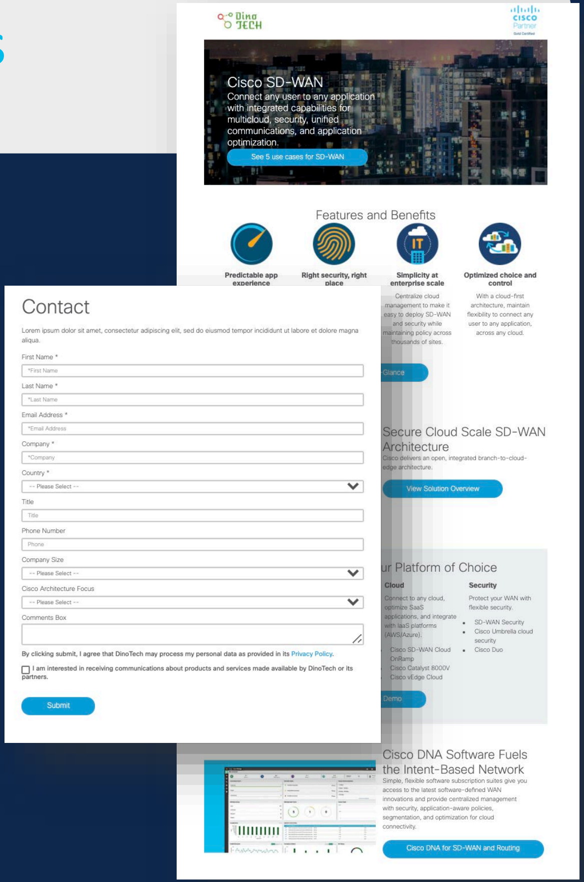
Leads are uploaded in MVF by partners as proof of performance for marketing activities, which will now stay within Marketing Velocity Central and can be viewed in available reports.

Leads Demo

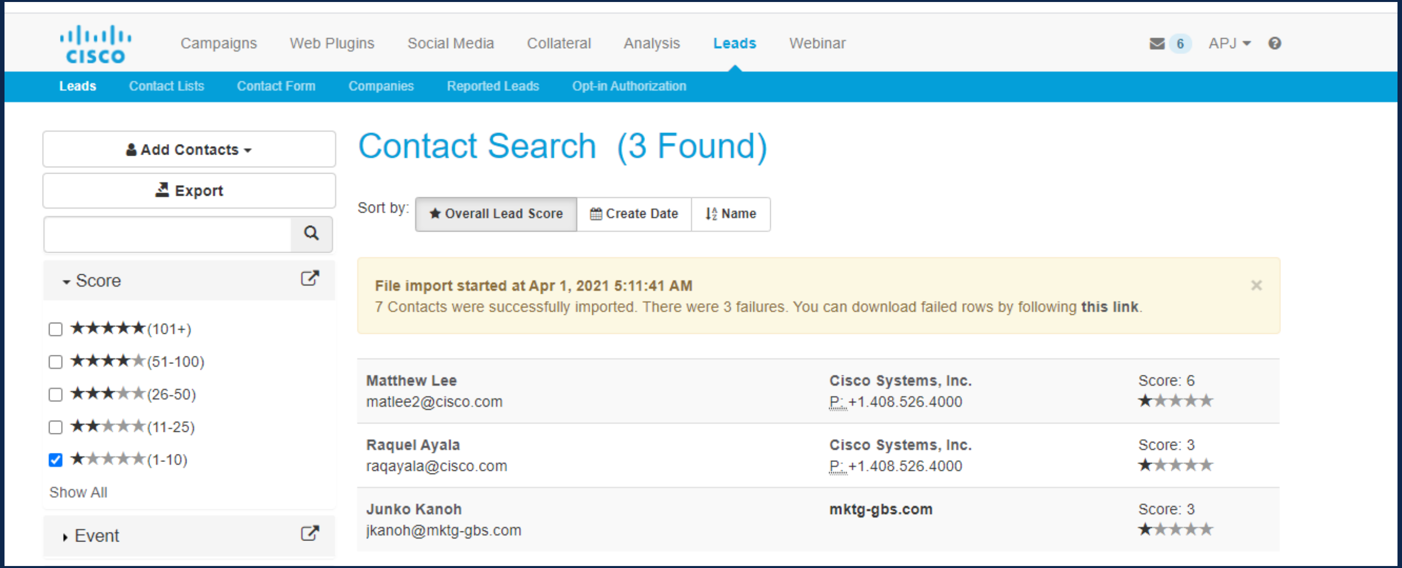
1. Marketing Velocity Central Generated Leads
2. Marketing Velocity Funds Generated Leads

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



Marketing Velocity Central Generated Leads

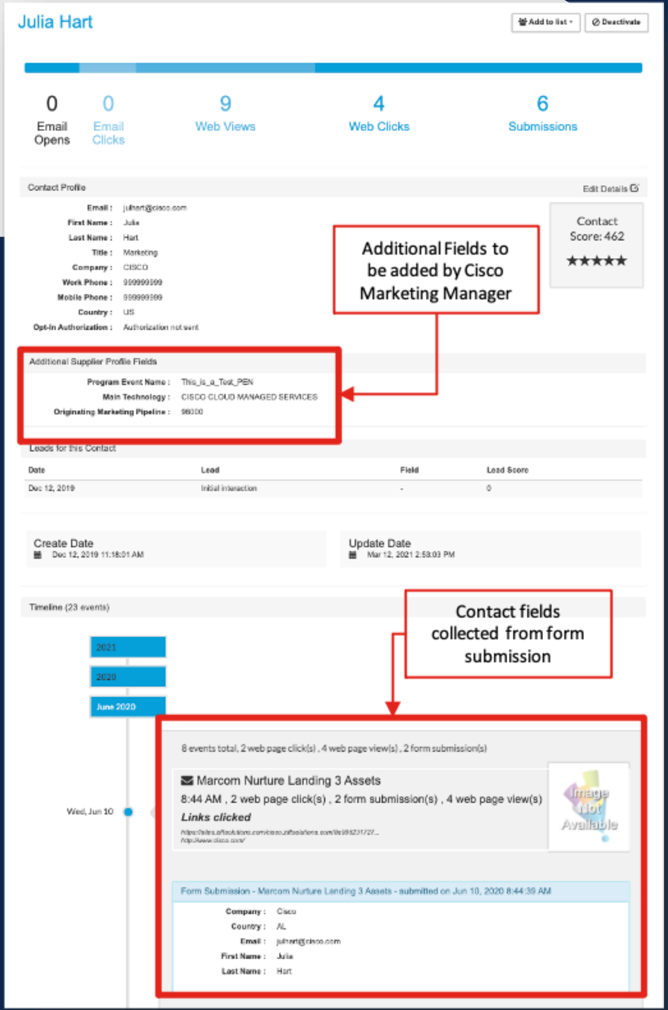


1. Proceed to Leads
2. Select Leads
3. Select the contact for lead conversion

Marketing Velocity Central Generated Leads

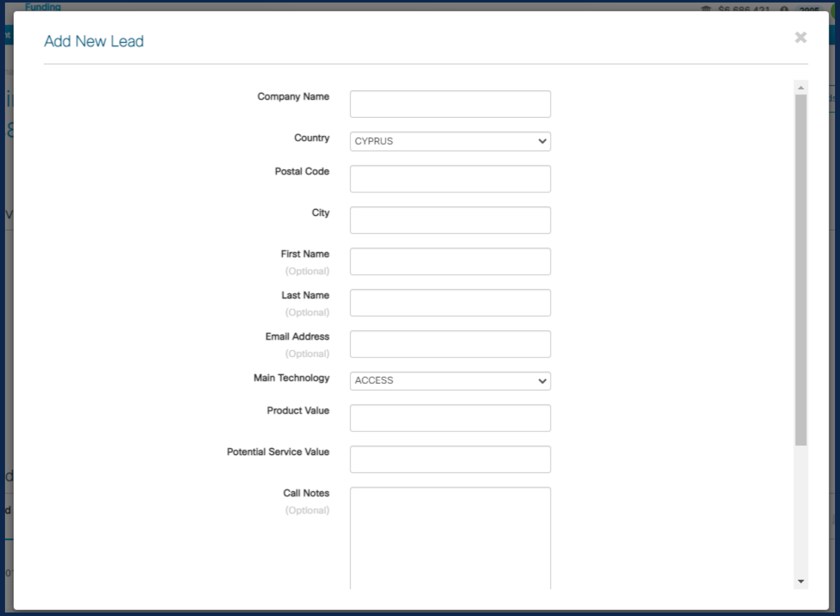
Select Edit Details
Input originating marketing pipeline value and main technology to the lead record as seen here.

Field	Source	Example
First Name	Landing page form required field	Julia
Last Name	Landing page form required field	Hart
Email Address	Landing page form required field	julhart@test.com
Company Name	Landing page form required field	Test Systems, Inc.
Country	Landing page form required field	US
Main Technology	Added by partner or PMM	ROUTERS
Originating Marketing Pipeline	Added by partner or PMM	12500



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

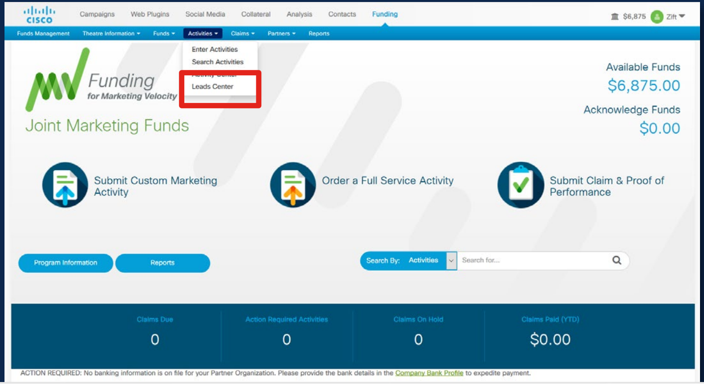


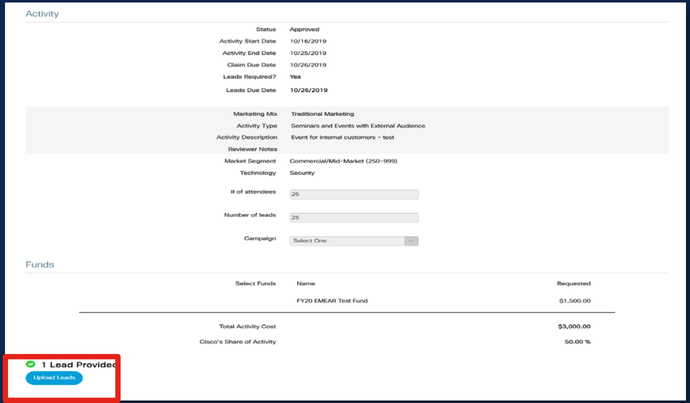
*Leads can be viewed in Marketing Velocity Central within 12 hours.

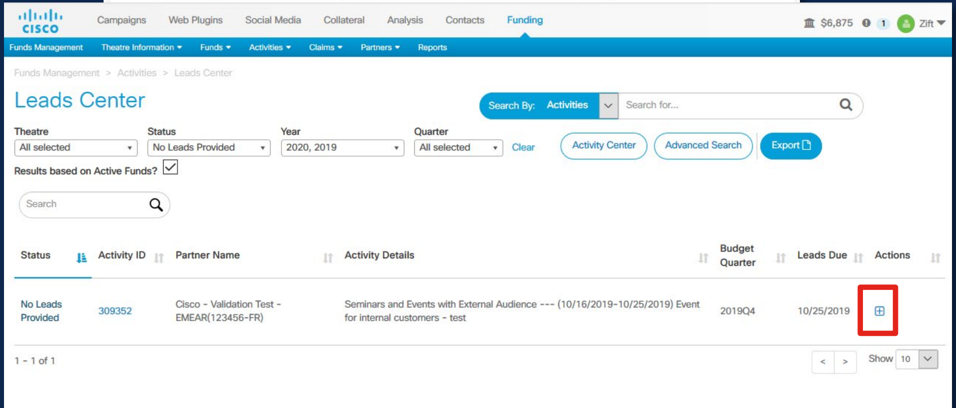
Accessing the Lead Center to Submit Leads

The Lead Center Can be accessed 3 ways:

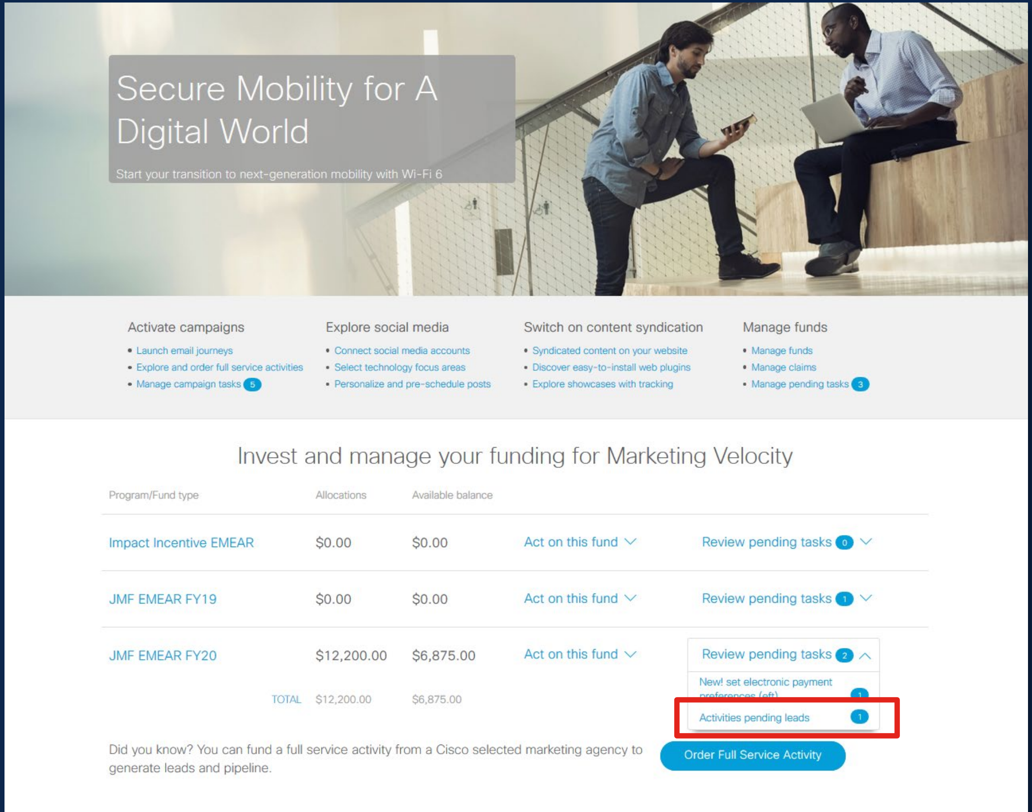
1. From the Marketing Velocity Central Home Page fund manager
2. From the 'Activities' Menu on the Funding Manager Home Page
3. From within the Activity View







Uploading Leads for Activities Requiring Proof of Performance



Marketing Velocity Central

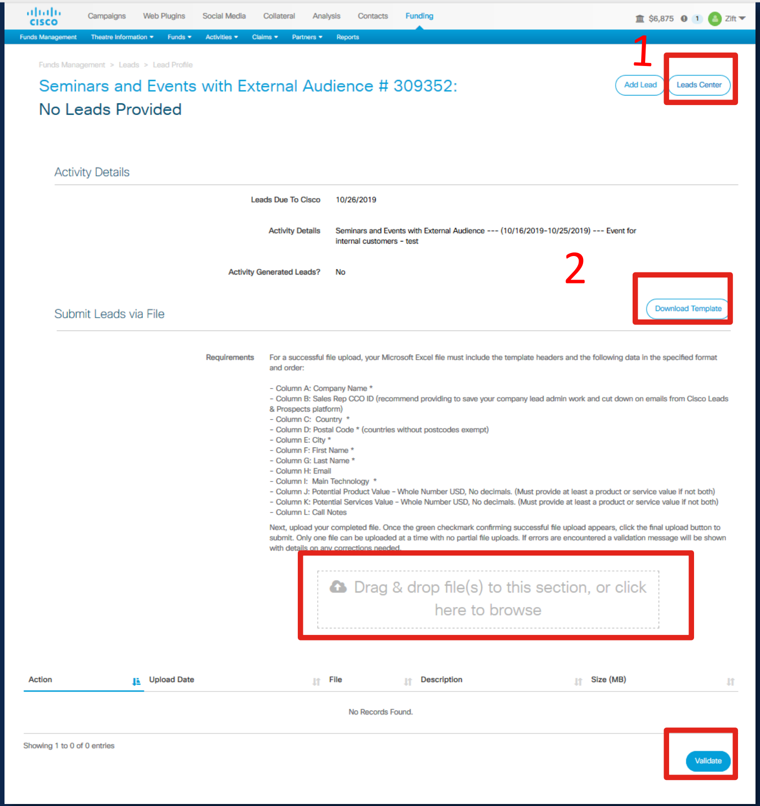
Log into **Marketing Velocity Central**
http://marketingvelocitycentral.cisco.com

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

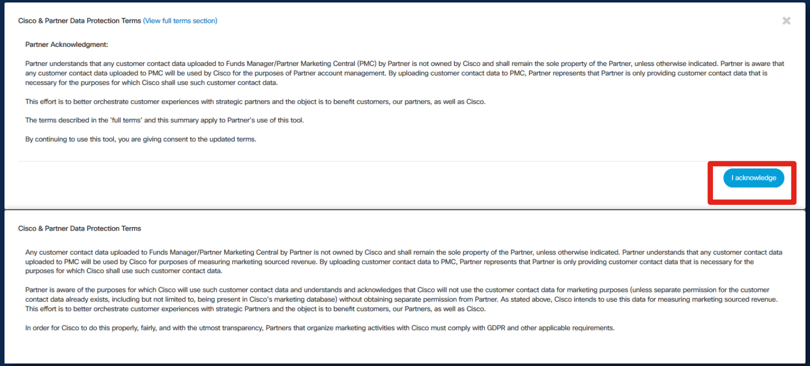
Uploading Leads for Proof of Performance in Demand Generation Activities

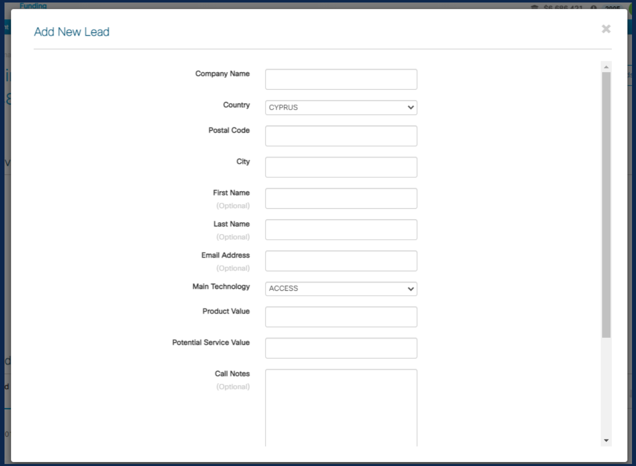


Once you arrive on the Lead Submission Page there are 2 options for loading leads.

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





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

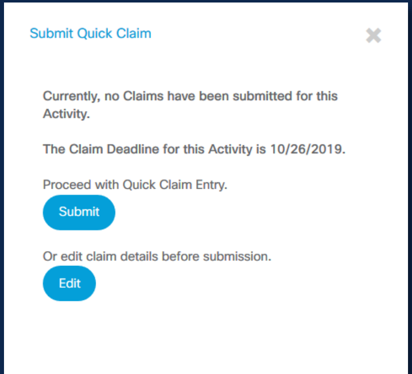
Country and Main Technology must be selected from the available menu

Requirements

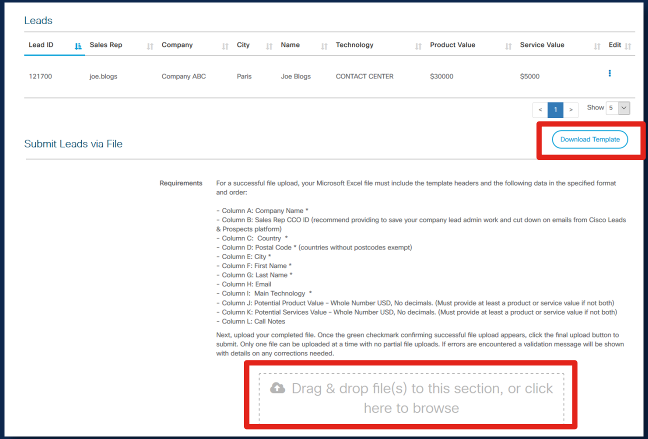
For a successful file upload, your Microsoft Excel file must include the template headers and the following data in the specified format and order:

- 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

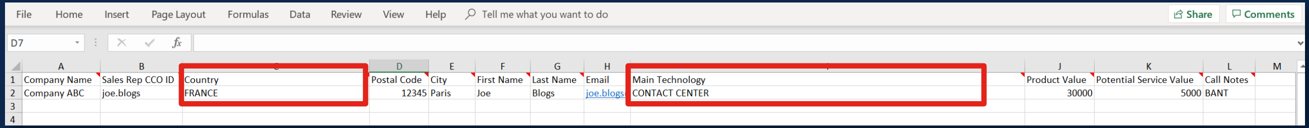
Next, upload your completed file. Once the green checkmark confirming successful file upload appears, click the final upload button to submit. Only one file can be uploaded at a time with no partial file uploads. If errors are encountered a validation message will be shown with details on any corrections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

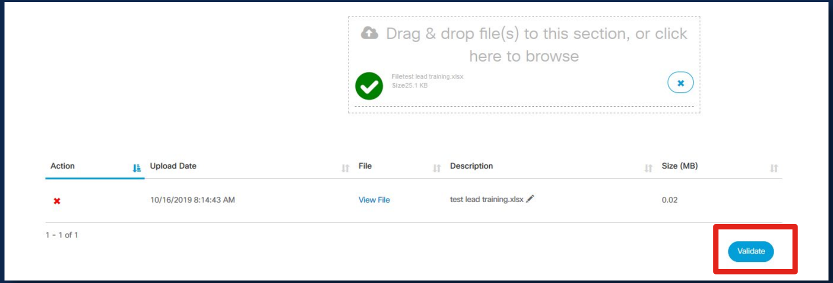


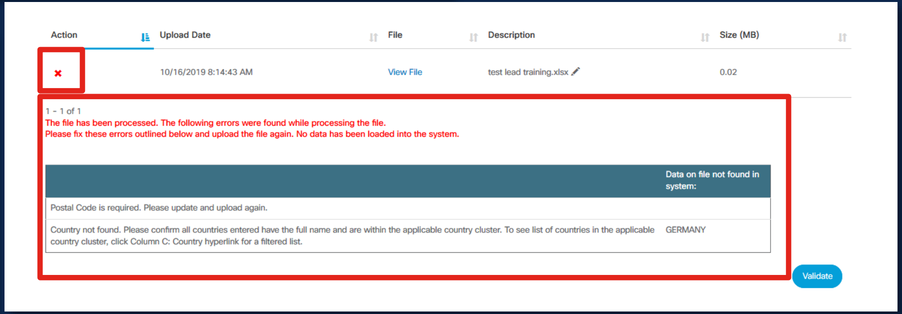
Uploading Leads: Option 2 – Uploading multiple leads via the lead upload template



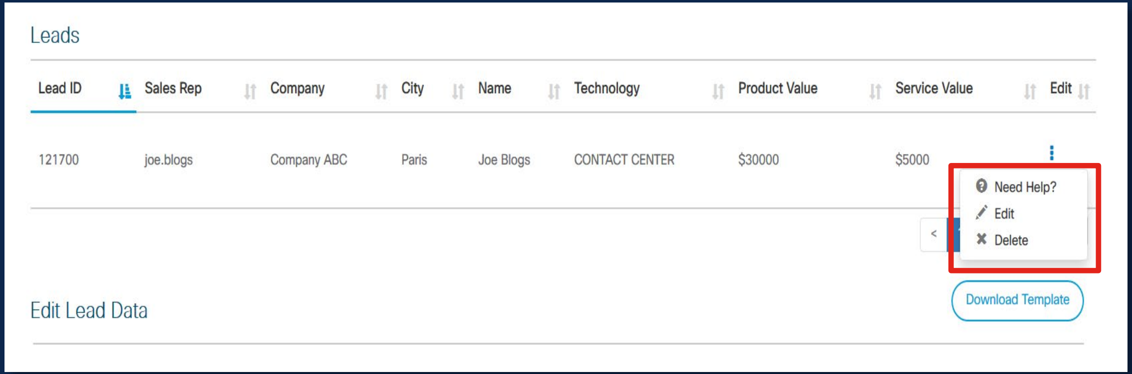
1. First download the template. You must download a new template each time you want to load new leads into and Activity. The template cannot be saved and used for other activities
2. Drag and drop the completed template into the window provided or select browse to upload from a saved folder on your computer.
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







Editing Uploaded Leads and Support in Marketing Velocity Funds



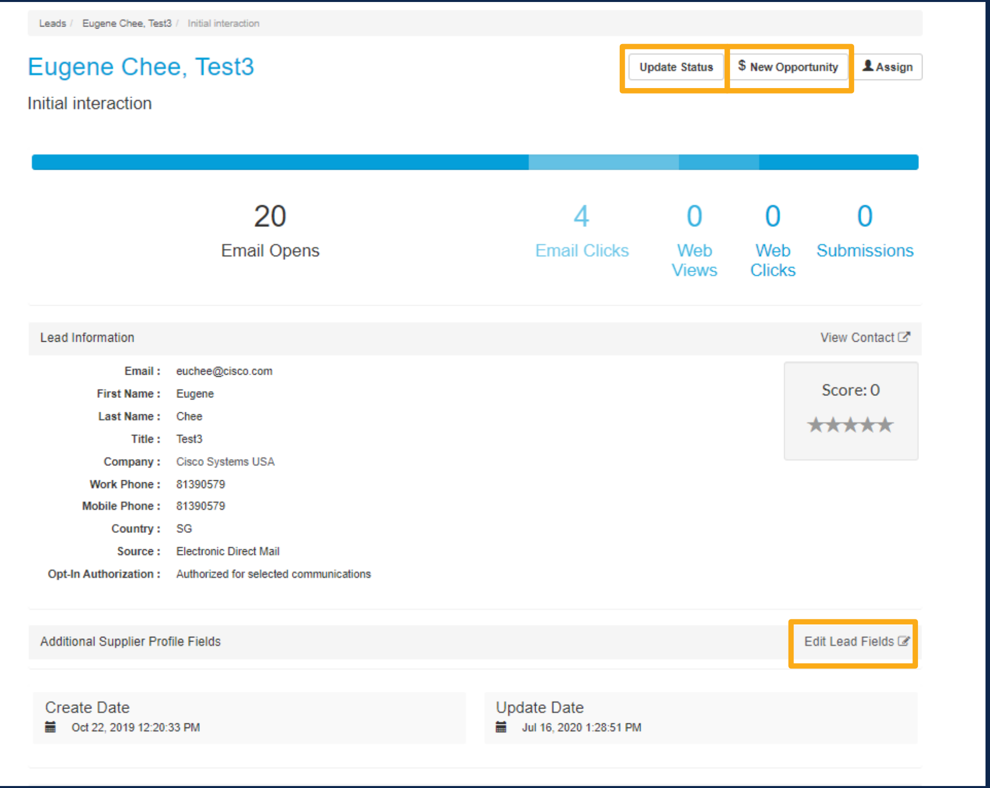
Loaded leads can be deleted or edited if errors are detected after they are submitted.

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

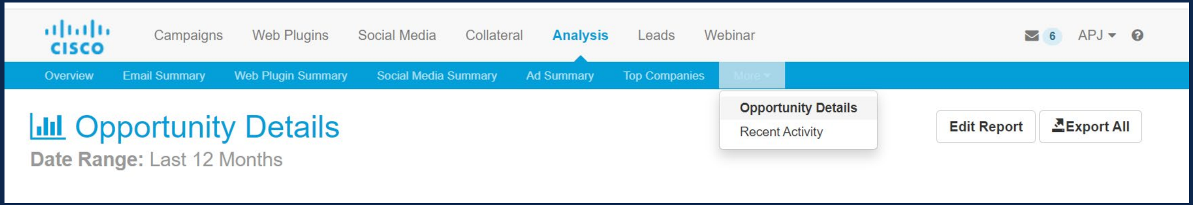
Updating Marketing Velocity Central Generated Leads

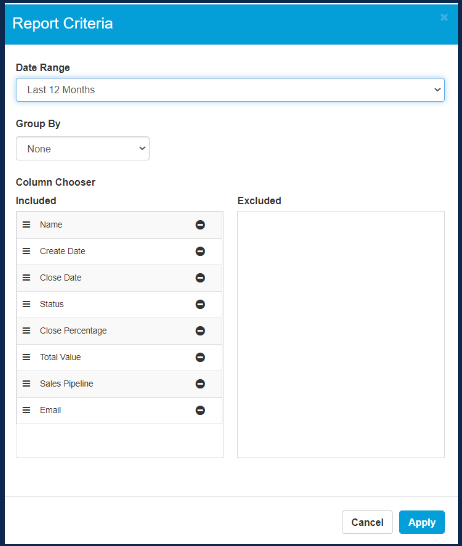
1. Update Lead Status
2. Edit Lead Details
3. New Opportunity



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**





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 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 is it 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.).

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_emear@cisco.com

Marketing
Velocity