

Noemia Calor

From: Noemia Calor
Sent: 10 May 2021 08:11
To: Natalie Roberts; Gavin Peel; Sandra Williams
Cc: Shahibur Rahman; Alija Gurung
Subject: LMS/EIMS - Rubrik Channel Dashboard, Processes and Reports setup - User story ready for sign-off - 10/05/2021

Hello Natalie, Gavin, Sandra,

We have completed the work for PSO Request user story 6939: Rubrik Channel Dashboard, Processes and Reports setup on time. You have a sign-off invite in your calendars for today, Monday 10th May.

Here's the acceptance criteria we have worked towards:

Acceptance Criteria

The following criteria need to be met

1. Processes to copy and customise
 1. Quarterly Mktg Activity Progress
 2. Telemarketing
 3. Email
 4. Enablement
 5. Web or Social Content
 6. Event
2. Datasource set up for data fields: Partners, Distributors, Business Objectives, Channel Pr
3. Process to create: Partner Profiling (mirroring calling system)
4. Bulk Import and update all partner profiling activity from the EIMS calling system for RL
5. Activity Report for Partner Profiling process
6. Service to copy and customise: **Quarterly Marketing Activity Progress**
7. Reports to copy and customise (Filters on region, country, timing, business objective, pæ
 1. Business Plan Activity Progress Report
 2. Business Plan Activity Progress Report by Partner
 3. Create/update stored procedures
 4. Currency is **USD (\$)**
8. Dashboard set up & external Resources includes (downloadable templates for **Marketi**
How to documentation supplied by Client
9. SFDC report to extract Partner Leads & Opps
 1. Link to this report in External Resources tile
10. Bulk Updater set up (train Sandra & Natalie) – (lead/opp follow up from SFDC)


What we have done:

Set up a channel dashboard (one stop shop) for all needs on this campaign and also a very comprehensive training pack for all the team

- Accessible via the foyer



Welcome to the Business Plan Foyer




Storefront



Work Management



Report

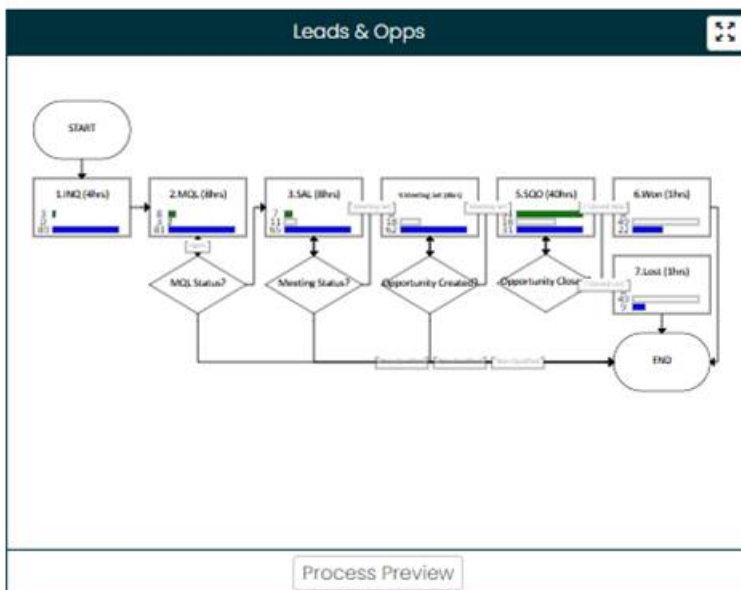
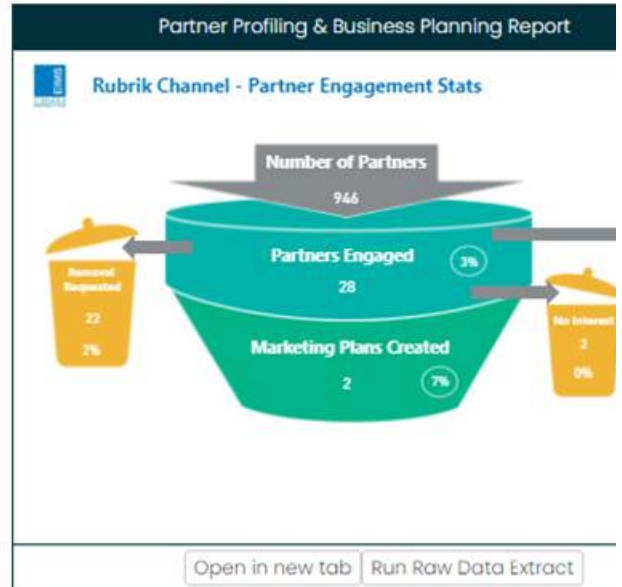
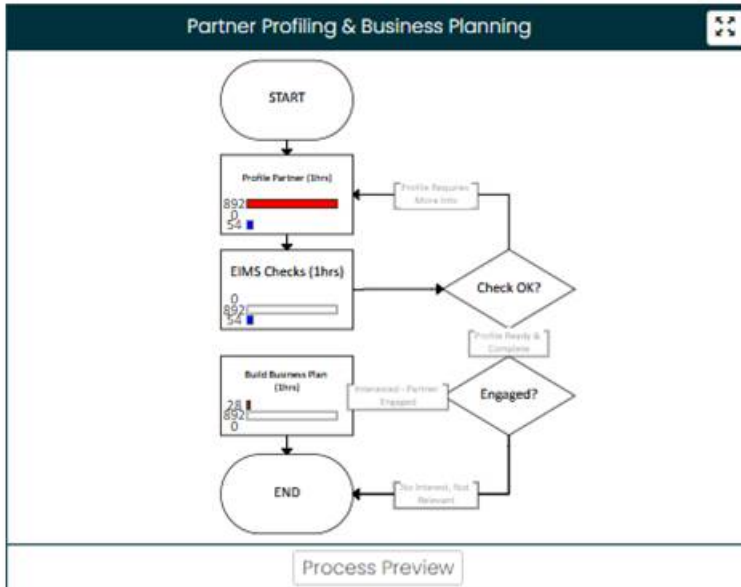
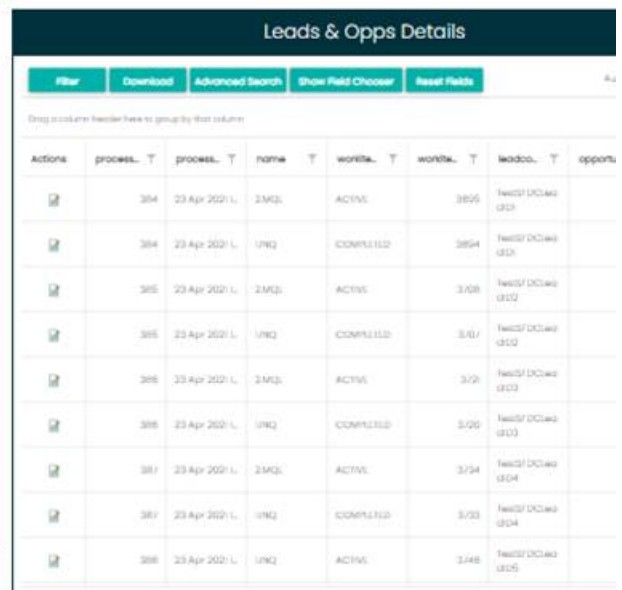


User Directory



Channel Dashboards

Channel Dashboard [From Partner Profiling & Engagement to Leads & Opps for Executed Campaigns]

Leads & Opps Details

Filter	Open/Close	Advanced Search	Show Field Chooser	Reset Fields									
Actions	process...	T	process...	T	name	T	worlta...	T	worlta...	T	leadob...	T	opport...
384	23 Apr 2021	L	2.MQ	ACTIVE	3805	Next/DC/WD/030							
384	23 Apr 2021	L	1.MQ	COMPLETED	3854	Next/DC/WD/030							
385	23 Apr 2021	L	2.MQ	ACTIVE	3708	Next/DC/WD/030							
385	23 Apr 2021	L	1.MQ	COMPLETED	3717	Next/DC/WD/030							
388	23 Apr 2021	L	2.MQ	ACTIVE	3708	Next/DC/WD/030							
388	23 Apr 2021	L	1.MQ	COMPLETED	3700	Next/DC/WD/030							
387	23 Apr 2021	L	2.MQ	ACTIVE	3734	Next/DC/WD/034							
387	23 Apr 2021	L	1.MQ	COMPLETED	3703	Next/DC/WD/034							
388	23 Apr 2021	L	1.MQ	ACTIVE	3748	Next/DC/WD/035							

In the dashboard you will find the 3 WMS processes needed for channel:

- **Partner Profiling & Business Planning** (in tile 1)
 - Mirrors the calling system
 - Processes have been moved to the present state in the calling system (at deployment stage we will again tally with the calling system. Ideally your Concierge team should be using WMS to profile their partners as soon as we complete the deployment)

The Partner Profiling & Business Planning process can be kicked off in bulk by Admin level Users only (emailed using the provided template to PartnerProfiling@rubrik.campaigntracking.com) or can be kicked off manually using the service in Storefront:



Partner Profiling & Business Planning

Process used to gage Partner Engagement and also to build a Business Plan with interested partners

Cost

View

- **Quarterly Marketing Activities** (in tile 3 which has the parent process: Quarterly Mktg Activity Progress and the 5 sub processes:
 - Telemarketing
 - Email
 - Enablement
 - Web or Social Content
 - Event

The Quarterly Marketing Activities process can be kicked off in bulk by all users in the team (emailed using the provided template to QuarterlyMarketingActivities@rubrik.campaigntracking.com) or can be kicked off manually using the service in Storefront:



Quarterly Marketing Activity

Quarterly Marketing Activity Process - This is the overarching process for Rubrik marketing activities in a business plan. Each marketing activity is tracked (execution date confirmed, results & revenue generated). This is to make sure that we can prove ROI for marketing spend.

Cost

View

- **Leads & Opps** (in tile 5)
The Leads & Opps process can only be kicked off in bulk by all users in the team (emailed using the provided template to leadsopps@rubrik.campaigntracking.com)

Datasources set up so that they can be easily managed in the future (If you need a new value for anyone, then a simple support request will suffice for the datasource to be updated)

Database Details

Database Name *	WMS Custom
Table Name *	PARTNERS
Value Field	BUSINESS_OBJECTIVES
Description Field*	CHANNEL_PROGRAM_LEVEL
Sort Order	DISTRIBUTORS
Filter	DMU_ROLE
New Values Are Permanent	EXECUTION_FY_QTR
	PARTNERS
	SALES_PLAY
	TARGET_AUDIENCE
	TYPE

Marketing Activities Report in USD\$ (in tile 4 customised to Rubrik)

- Button under tile to run by **Partner** too



rubrik

View Report - Marketing Activities Progress Report

Go Back
Run Report
Schedule Report

Report parameters

Execution From Date

Execution To Date

Select the Financial Year

Business Plan Progress Report (with detail of new marketing plan activities for partners).



rubrik

Marketing Activities Report

CDM-CEUR

CDM-NEUR

CDM-SEUR-R

CDM-UK&I

Partner Engagement Overview
 Analysis by Partner: Partners who have engaged with EIMS across all activity types, including the number of requests, value of deals, number of units and closed revenue

External Resources includes all training content & downloadable templates (in tile 8)

- The comprehensive training pack is downloadable from here for all users
- At the bottom of the tile there is a link to the SFDC report used by the EIMS team: [EIMS Campaigns with Members report](#) (they will only need to sign-in)
- The API & URL for use of Bulk Updater app (Admin resource only) along with JSON are also accessible at the bottom of the tile (we will train on how to use and it is also extensively covered in the training pack)



Training Content

[Channel Training Pack](#)[SFDC Campaign Creation](#)[Cross Reference Leads Sent to Marketing Opps](#)

Templates

[Marketing Plan - FY22](#)[Quarterly Marketing Activities Bulk Import](#)[Leads for Marketing Ops](#)[Partner Leads Upload Bulk Import](#)[Partners to Profile Bulk Import](#)

Channel Reports sync daily between 16:00 & 16:30 BST

Bulk Process Updates - L:\Campaign Admin\Bulk Process Updater - NEW APP

Report Repository: K:\Reporting\Rubrik\LiveCampaigns\Rubrik Channel Marketing Concierge\ExternalStandardReports

Responsible for partner profile data: Gavin Peel, Natalie Roberts, and Sandra Williams

Cadence: Daily

[API & URL](#)[JSON Template](#)[SFDC Report](#)

I hope you're happy with the above 😊

Once you complete the sign-off WorkItem, we can deploy (do all cleanup of dummy data and progress the profiling process to match the very latest report from the calling system) 😊 This means your team can then start pursuing the partners via WMS instead of the calling system.

Kind regards,

Noemia