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

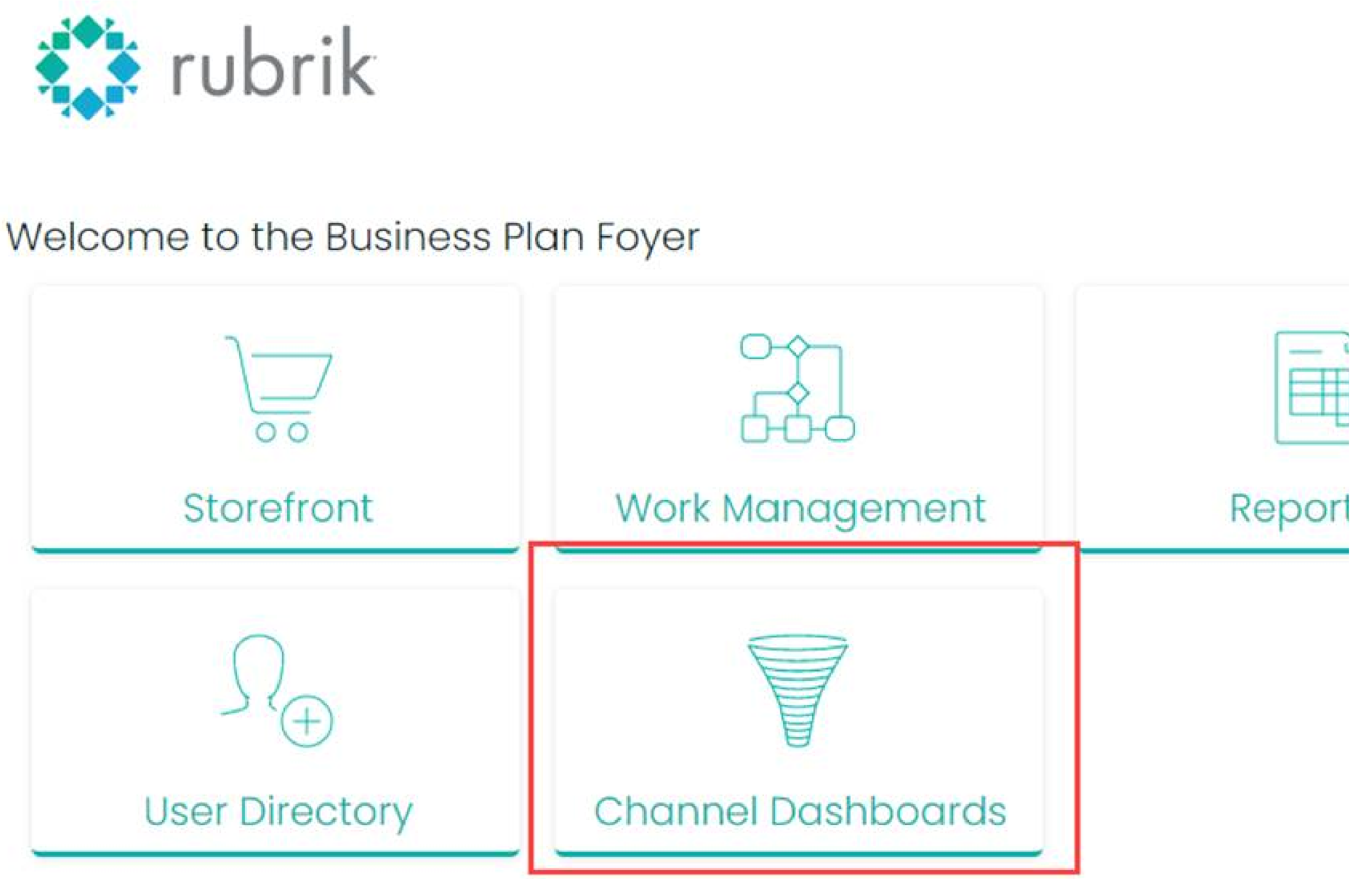
The following criteria need to be met ......:

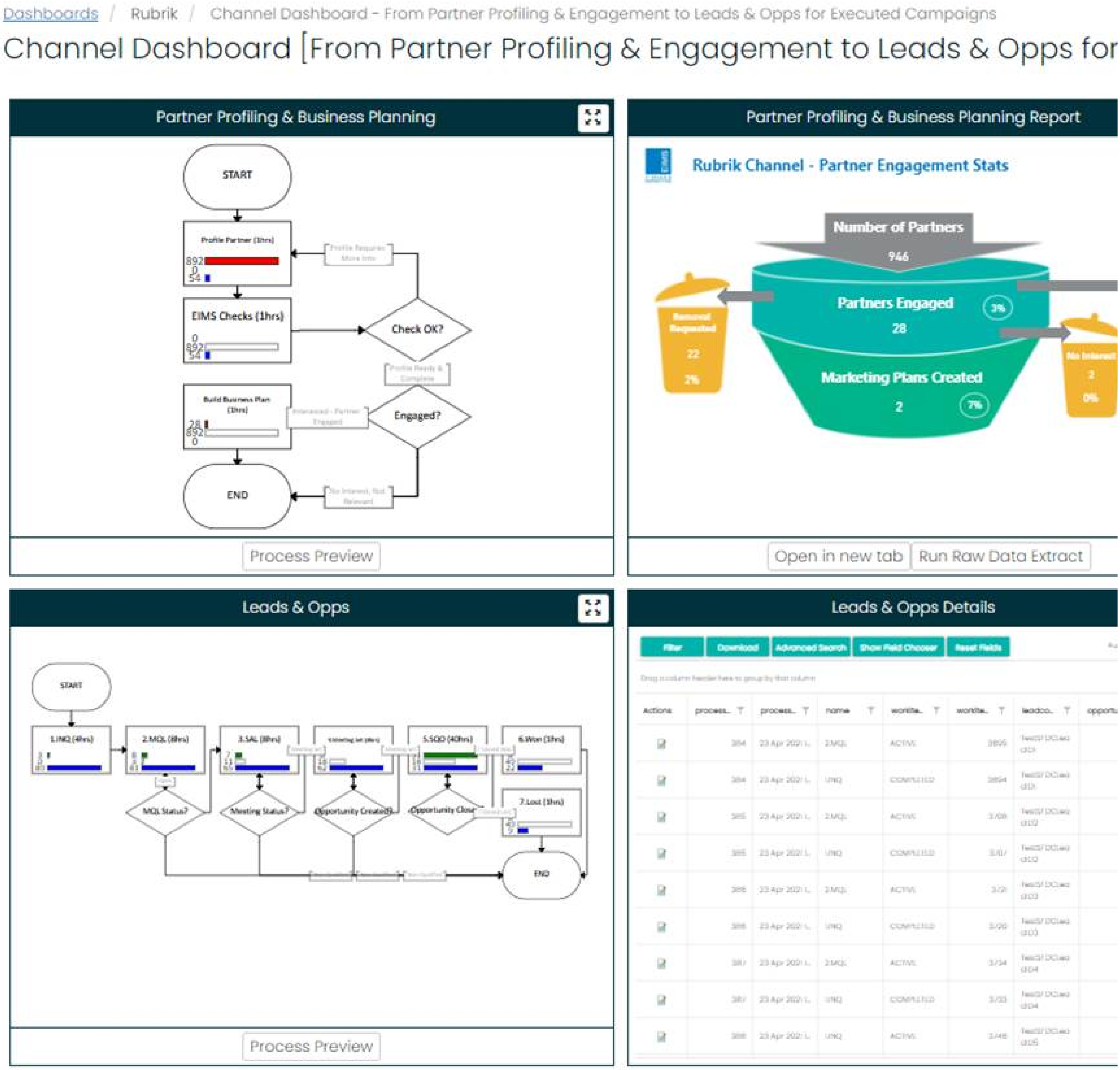
1. Processes to copy and customise
    1. Quarterly Mktg Activity Progress
    2. Telemarketing
    3. Email
    4. Enablement
    5. Web or Social Content
    6. Event
2. Datasource set up for data fields: Partners, Distributors, Business Objectives, Channel Pr
3. Process to create: Partner Profiling (mirroring calling system)
4. Bulk Import and update all partner profiling activity from the EIMS calling system for RU
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, pa
    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 **Marketir 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


rubrik
Welcome to the Business Plan Foyer
Storefront
Work Management
Report
User Directory
Channel Dashboards



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:

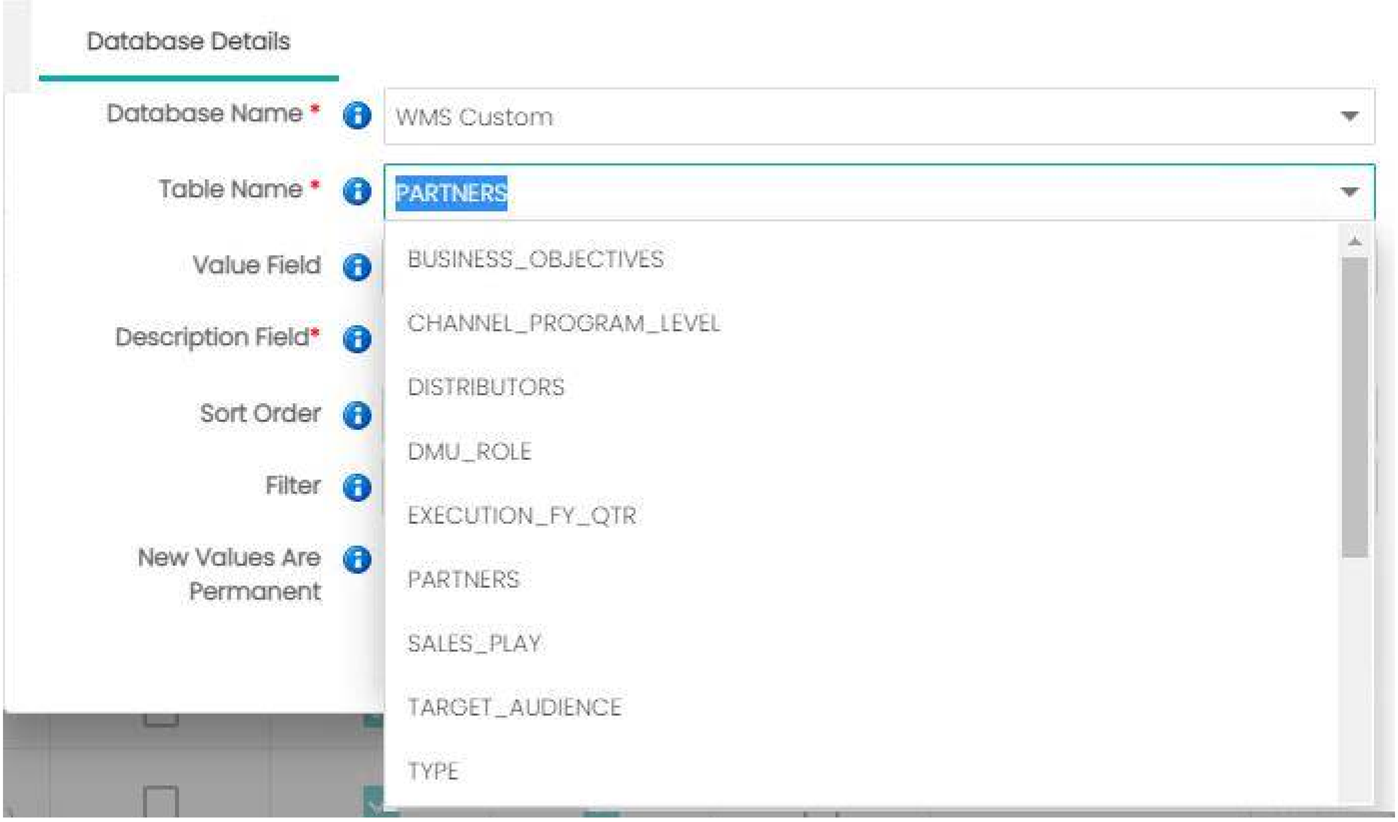
- **Quarterly Marketing Activities** (in tile 3 which has the parent process: Quarterly Mktg Activity Progress and the 5 sub processes:
  - Telemarketing
  - Email
  - Enablement
  - Web or Social Content
  - Event

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:

- **Leads & Opps** (in tile 5)

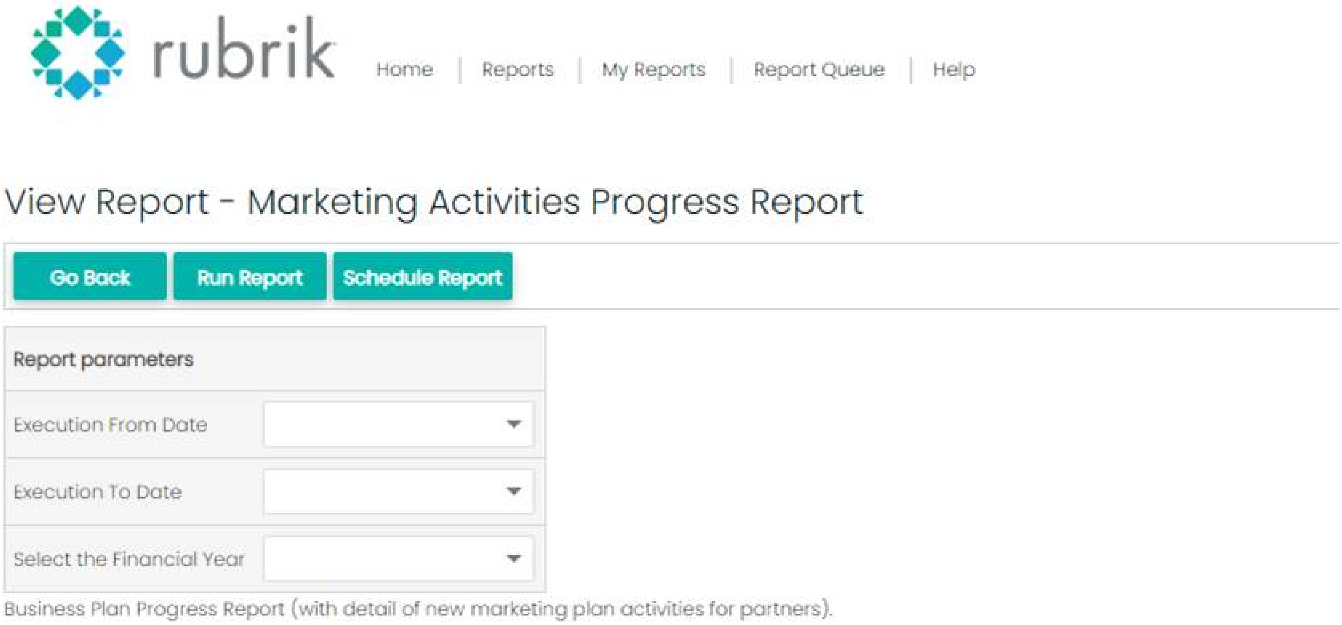
The Leads & Opps process can only be kicked off in bulk by all users in the team (emailed using the provided template to leadsopps@rubrik.campaigntracking.com)

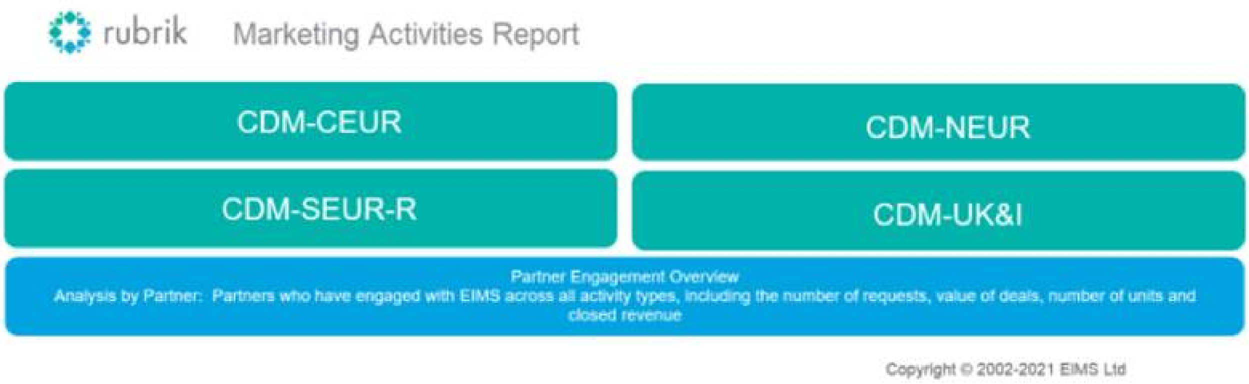
Datasources set up so that they can be easily managed in the future (If you need a new value for anyone, then a simple support request will suffice for the datasource to be updated)



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

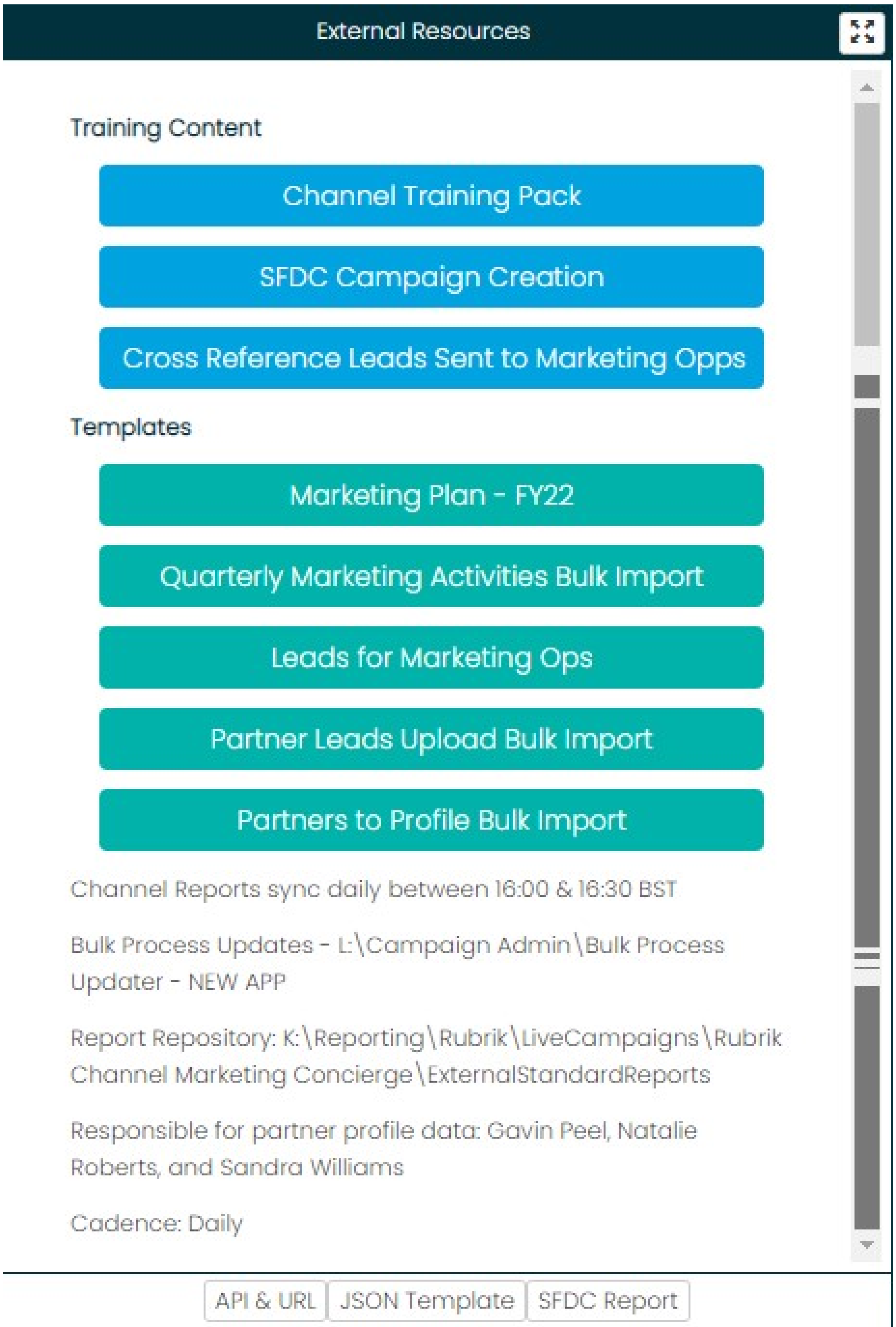
- Button under tile to run by **Partner** too





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)



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