

BUILDING BLOCKS

LAYING THE FOUNDATION FOR A SUCCESSFUL
TECHNOLOGY
INFRASTRUCTURE

Sales and **marketing programs** are data driven. So, your data model should deliver a **360-degree** view of customers and partners.

A complete **data model** will provide your account and program managers with the information they need to:

effectively manage assigned accounts

measure customer value

gauge program performance

Follow these tips to better **track, manage** and **maintain** your data.

Customer and **partner profiles** should be the center of your data model. To keep profiles accurate and complete, implement these standard extensions:



The Golden Account

the single source of truth for customer profiles

Control Attribute

includes type of account, record status, and lifecycle stage



Business Profile Attributes

company size, industries served, as well as other factors used by sales and marketing to segment customer accounts

Global Tiering & Segmentation Model (GTSM)

standard attributes consistently used to classify customers and partners for purposes of entitlement, program eligibility, reporting, and access to relevant portal content, tools and other resources



A program framework brings **visibility** of programs into your CRM, allowing sales and marketing teams to **interact** with this information. A basic implementation should include:



Sales and Marketing Program

the master definition for each program including dates, terms, requirements, and benefits

Account Program

the intersection between program and account that tracks enrollment, participation, and performance



Performance Transaction

tracks performance activity of each participant against the program

You need **more** than an account profile. Additional objects such as:



A CRM provides many of these, along with tools to **extend** or **customize** the data model so that you can build a comprehensive view.

See how managing your data better can make it all add up for your organization, **download the eBook, Enabling Your Technology Infrastructure.**

How Vistex Adds Value

With the rising cost of customer acquisition, the rapid pace of innovation and intense competition for market share, high tech companies must monitor program performance, drive demand and protect margins for critical revenue growth. Vistex enables high tech companies through an integrated solution that manages the full breadth of direct and indirect channel management including CDM, contracts, pricing, ship & debit, rebates, Co-op & MDF, incentives and IP royalties. High tech companies can now improve profitability through automation of complex programs, insights into program performance, incentive calculation accuracy, overpayment avoidance, increased compliance, streamlined reimbursements, and better manage the entire revenue management lifecycle.

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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