



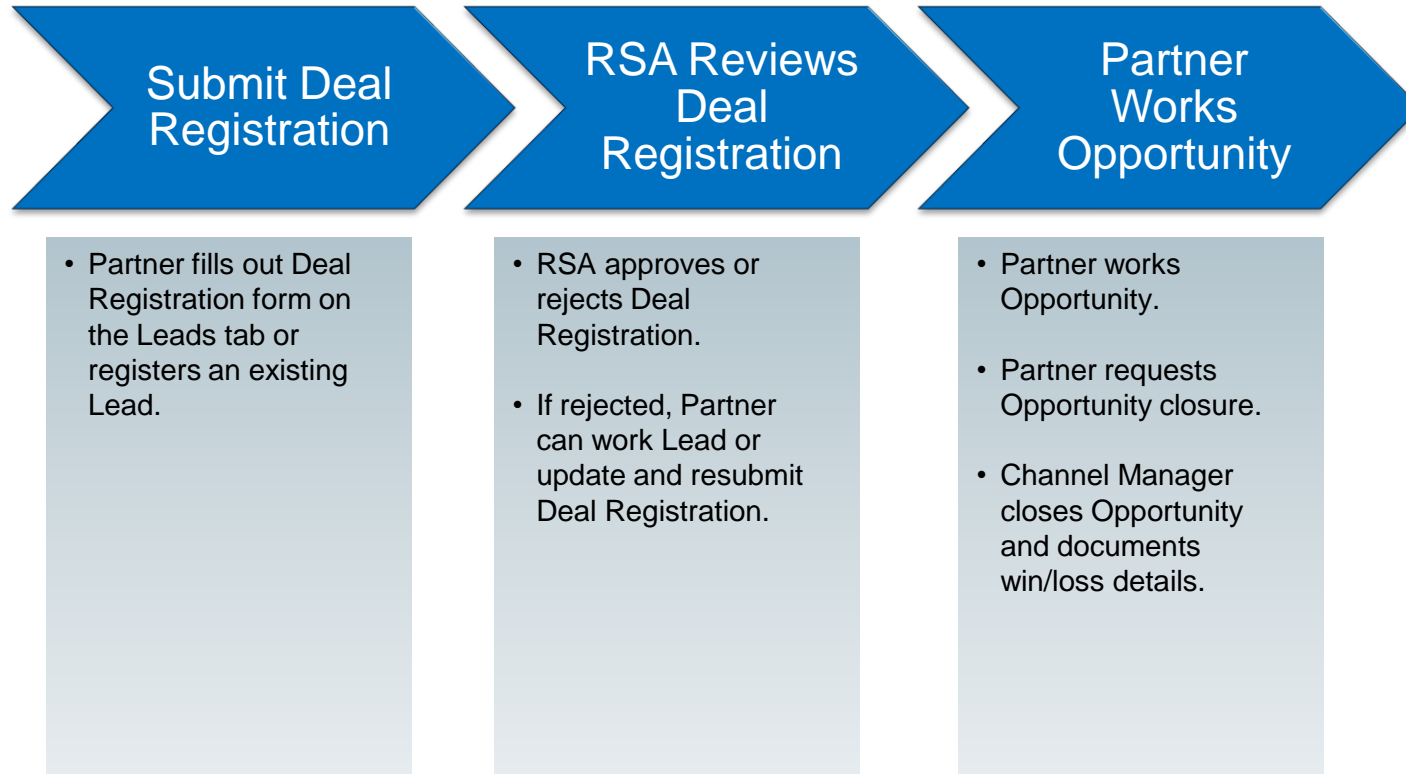
The Security Division of EMC

Deal Registration

Agenda

- ▶ Deal Registration Lifecycle
- ▶ Deal Registration Overview
- ▶ Deal Registration Origination
- ▶ How to Submit a Deal Registration
- ▶ Review Process
- ▶ Working an Opportunity
- ▶ Close Opportunity

Deal Registration Lifecycle



Deal Registration Overview

- ▶ Deal Registrations originate as Leads
 - Deal Registrations are a type of Lead in the PRM Connect Tool
 - Approved Deal Registrations are converted to Opportunities upon approval. Channel Managers will own Partner Opportunities
 - If the Deal Registration is not approved, Partners can continue working it as a Lead or update and resubmit for approval

- ▶ Improvements to Deal Registration
 - Ability to register existing Leads
 - Quickly clone a Deal Registration Lead
 - Easy navigation to Deal Registrations
 - Emails notify Partners when RSA has reviewed a Deal Registration
 - Streamlined Deal Registration Form with improved validation

Deal Registration List Views

- ▶ Deal Registration list views are available on the Leads and Opportunities tabs. They provide a quick and easy way to view Deal Registrations. Possible views are:

Leads Tab:

- All Deal Registrations: displays all open, pending and rejected Deal Registrations for the Partner Account (based on visibility setup)
- My Deal Registrations – Partners: displays all your open, pending and rejected Deal Registrations
- My Pending Deal Registrations: displays all pending Deal Registrations
- My Rejected Deal Registrations: displays all rejected Deal Registrations

Opportunities Tab:

- My Deal Registrations – Partners: displays all approved Deal Registrations

Searching for Deal Registrations

- ▶ Quickly search for your Deal Registrations using the *Advanced Search* on the Sidebar



System Actions to Search for a Deal Registration:

1. Click on the **Advanced Search...** link on the *Search* section of the Sidebar
2. Check the checkbox next to:
 - *Leads* - to search for Deal Registrations that have not yet been approved
 - *Opportunities* - to search for approved Deal Registrations
3. Enter search criteria into the *Search* field
4. Click on the **Search** button

The screenshot illustrates the search process in four steps:

- Step 1:** A red box highlights the "Advanced Search..." link in the sidebar search section.
- Step 2:** A red box highlights the "Opportunities" checkbox in the "Advanced Options" section, which is checked. The "Leads" checkbox is also highlighted with a red box.
- Step 3:** A red box highlights the search input field in the "Advanced Options" section.
- Step 4:** A red box highlights the "Search" button in the "Advanced Options" section.

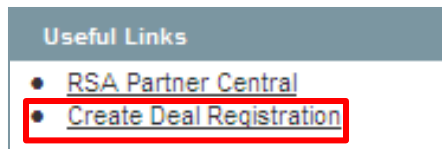
The "Advanced Options" section includes the following settings:

- Use enhanced search capabilities *i*
- Exact phrase
- Scope:
 - Accounts
 - Opportunities
 - Campaigns
 - Attachments
 - Contacts
 - Cases
 - Tasks
 - Reports
 - Leads
 - Case Comments
 - Notes

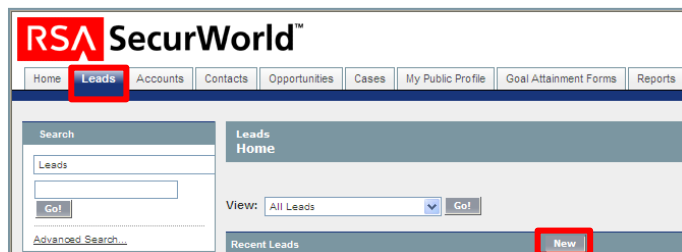
Deal Registration Origination

► There are 3 ways to create a Deal Registration:

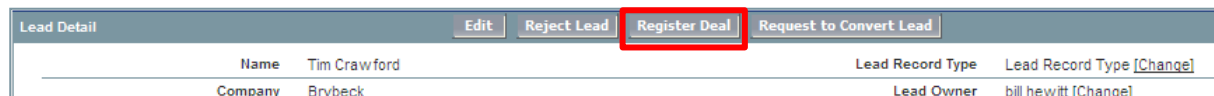
1. Create a Deal Registration Lead from the **Create Deal Registration** link on the Sidebar



2. Create a Deal Registration using the **New** button on the Leads tab



3. Register an existing Lead



Submit Deal Registration

Create Deal Registration



1. Quickly create a Deal Registration using the link on the Sidebar

RSA SecurWorld™ [Logout](#)

Home Leads Accounts Contacts Opportunities Cases My Public Profile Goal Attainment Forms Reports

Welcome, bill hewitt

bill hewitt
[My Company Profile](#)
[My Profile](#)

Channel Manager
[Mike Michalske](#)

Useful Links

- [RSA Partner Central](#)
- [Create Deal Registration](#)

Search

Leads

Go!

My Tasks [New](#) All Open

Complete	Date	Subject	Name	Related To
X	6/11/2010	Set up meeting with Bob Coyne		
X	6/17/2010	Send additional information		

Calendar

Today 6/21/2010

You have no events scheduled for the next 7 days.

June 2010

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	01	02	03	04	05
06	07	08	09	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	01	02	03

1 7 31



System Actions to Create a Deal Registration from the Sidebar:

1. Click on the **Home** tab
2. In the *Useful Links* section of the Sidebar, click on the **Create Deal Registration** link



Submit Deal Registration

Create Deal Registration Continued



2. Create a Deal Registration from the Leads tab

RSA SecurWorld™ Logout

1 Leads Accounts Contacts Opportunities Cases My Public Profile Goal Attainment Forms Reports

Search
Leads
Go!
Advanced Search...
Create New...

Leads Home
View: All Leads Go!
Recent Leads
2 New
Name Lead Record Type
Crawford, Tim Lead Record Type

New Lead
Select Lead Record Type
Select a record type for the new lead.
3 Record Type of new record Deal Registration
4 Continue Cancel



System Actions to Create a Deal Registration from the Leads Tab:

1. Click on the **Leads** tab
2. Click on the **New** button
3. Select **Deal Registration** from the *Record Type of new record* picklist
4. Click on the **Continue** button

Submit Deal Registration

Create Deal Registration Continued



3. Create a Deal Registration by registering an existing Lead

Note: RSA Generated Opportunities may not be eligible for Incremental Deal Registration benefits

Lead Detail				Edit	Reject Lead	Register Deal	Request to Convert Lead
Name	Tim Crawford	Lead Record Type	Lead Record Type	[Change]			
Company	Brybeck	Lead Owner	bill hewitt	[Change]			
Job Title		Lead Type	Lead				
Email	tim.crawford@brybeck.com	Lead Status	NEW				



System Actions to Register an Existing Lead:

1. Click on the **Leads** tab
2. Click on the Lead name you want to register
3. Click on the **Register Deal** button at the top of the Lead page

Submit Deal Registration

Filling out the Deal Registration Form



- ▶ The Deal Registration form has been streamlined to capture key information

Information captured on the Deal Registration form is carried over to the Opportunity.

Lead Edit [Save] [Save & New] [Cancel]

Customer information - Required information

Company	<input type="text"/>	Lead Record Type	Deal Registration
Street	<input type="text"/>	Lead Owner	bill hewitt
City	<input type="text"/>	Lead Status	NEW
Country	--None--	Deal Reason	--None--
State/Province	--None--	Deal Reason Comments	<input type="text"/>
Postal Code	<input type="text"/>	Alternative Company Names(Variations)	<input type="text"/>
		Website	<input type="text"/>

End User Primary Contact

First Name	--None--	Primary Contact Work Phone	<input type="text"/>
Last Name	<input type="text"/>	Email	<input type="text"/>

End User Contacts

Tech Contact First Name	<input type="text"/>	Budget Contact First Name	<input type="text"/>
Tech Contact Last Name	<input type="text"/>	Budget Contact Last Name	<input type="text"/>
Tech Contact Work Phone	<input type="text"/>	Budget Contact Work Phone	<input type="text"/>
Tech Contact Email	<input type="text"/>	Budget Contact Email	<input type="text"/>

Deal Description

Deal Description	<input type="text"/>
Competitive Product Considered?	--None--
Competitive Vendor	<input type="text"/>

Required Fields are marked with a red bar.



Submit Deal Registration

Filling out the Deal Registration Form



- ▶ Products entered on the Deal Registration will be locked when the Deal Registration is approved

Authentication Products	
Authentication Manager	--None--
Auth Mgr User Count	
Access Manager	--None--
Access Mgr User Count	
Certificate Manager	--None--
Cert Mgr User Count	
HVV Authenticators	
SVV Authenticators	
On Demand Authenticators	

Auth Mgr Add-On	**Not Applicable**	▶	**Not Applicable**	▼	i
Access Mgr Add-On	**Not Applicable**	▶	**Not Applicable**	▼	i
Cert Mgr Add-On	**Not Applicable**	▶	**Not Applicable**	▼	i

The Add – On fields allow you to select relevant Add – Ons to the products you selected on the left.

Use the arrows to select an Add – On.

Submit Deal Registration

Filling out the Deal Registration Form



- ▶ An individual Deal Registration should be submitted for DLP, enVision and PII bundles

Tip: Use the *Clone* button to create Deal Registrations for multiple products

The screenshot shows the following form fields:

- RSA enVision Platform:** enVision (dropdown: --None--), enVision Add-On (text: **Not Applicable**), enVision Add-On (text: **Not Applicable**).
- RSA Data Loss Products (DLP):** DLP (dropdown: --None--), DLP Add-On (text: **Not Applicable**), DLP Add-On (text: **Not Applicable**), DLP User Count (text input).
- Bundles:** Bundles (dropdown: --None--), Bundle User Count (dropdown: --None--).
- Upgrade License Number:** License Number (If Upgrade) (text input).

The Add - On fields allow you to select relevant products to submit with the products selected in the picklist. Any combination of Add - Ons can be submitted.

Submit Deal Registration

Filling out the Deal Registration Form



If the Deal Registration is approved, the Projected Value and Expected Close Date values will carry over to the Opportunity.

Deal Information	
Projected Value	<input type="text"/>
Expected Close Date	<input type="text" value="[8/21/2010]"/>
Sales Stage	--None--
Public Sector (EMEA Only)	<input type="checkbox"/>
RFP for the Deal	<input type="checkbox"/>
Primary Program Name	<input type="text"/>
Promotion Code	<input type="text"/>
Re-Registration Opportunity	<input type="text"/>

Partner Contacts	
Same as Submitter	<input type="checkbox"/>
Opportunity Contact First Name	<input type="text"/>
Opportunity Contact Last Name	<input type="text"/>
Opportunity Contact Email	<input type="text"/>
Certified Engineer First Name	<input type="text"/>
Certified Engineer Last Name	<input type="text"/>
Certified Engineer Email	<input type="text"/>

When you are the Primary Contact, check the *Same as Submitter* checkbox to automatically populate your user information into this section of the form. Your user information will populate when you click on the **Save** button.

If you are not the Primary Contact, enter your name.

If RSA has made programs available to you, the Deal Registration can be associated with a program using the magnifying glass icon. Please note that the program association cannot be changed once selected.

Submit Deal Registration

Save Before Submitting



- Deal Registrations must be saved before they can be submitted. Upon saving, the PRM Connect Tool will perform validations to confirm the Deal Registration meets program rules and guidelines

Lead Edit

Save Save & New Cancel

Customer information

Company
Street
City
Country
State/Province
Postal Code

Lead Record Type: Deal Registration
Lead Owner: bill hewitt
Lead Status: NEW
Dead Reason: --None--
Dead Reason Comments
Alternative Company Names(Variations)
Website

End User Primary Contact

First Name
Last Name
Primary Contact Work
Phone
Email

End User Contacts

Tech Contact First Name
Tech Contact Last Name
Tech Contact Work
Tech Contact Phone
Tech Contact Email

Budget Contact First Name
Budget Contact Last Name
Budget Contact Work
Budget Contact Phone
Budget Contact Email

Submit Deal Registration

Cloning



► After saving, the *Clone* button appears. To quickly copy a Lead, use the clone feature:

- **Why:** When a new Lead is available at the same client
- **When:** When two Deal Registrations are needed to include separate products

Tip: Use the Clone button to create Deal Registrations for multiple products

Customer Information			
Company	Kirwin & Sons	Lead Record Type	Deal Registration
Street	100 East 85th	Lead Owner	bill hewitt [Change]
City	New York	Lead Status	NEW
Country	USA	Lead Reason	



System Actions to Clone a Deal Registration:

1. Create and save a Deal Registration
2. Click on the **Clone** button to copy the entered fields
3. Click on the **Edit** button to edit the products on each Deal Registration
4. Click on the **Save** button

Submit Deal Registration

Add Distributor



- ▶ After saving, you can add a Distributor to your Deal Registration
 - **Why:** To automatically notify the Distributor if your deal is approved
 - **When:** Before you submit the Deal registration. You cannot add a Distributor to the Deal Registration after it is submitted

Lead Detail			
<a>Edit <a>Submit for Approval <a>Clone <a>Add Distributor			
Customer Information			
Company	Kirwin & Sons	Lead Record Type	Deal Registration
Street	100 East 85th	Lead Owner	bill hewitt <a>Change
City	New York	Lead Status	NEW
Country	USA	Dead Reason	<a>?

Upon clicking the **Add Distributor** button, Distributors will display based on the coverage country of the Distributor.

In North America, if a Partner has nominated a Distributor and the Deal Registration contains DLP or enVision products, only the Nominated Distributor will be available to select.

Submit Deal Registration

Submit Deal Registration for Approval



- ▶ When the Deal Registration form is ready for RSA review, click on the **Submit for Approval** button


Lead Detail			
<a>Edit <a>Submit for Approval <a>Clone <a>Add Distributor			
Customer Information			
Company	Kirwin & Sons	Lead Record Type	Deal Registration
street	100 East 85th	Lead Owner	bill hewitt <a>[Change]
City	New York	Lead Status	NEW
Country	USA	Lead Reason	

Submit Deal Registration

View Deal Registration Status



- ▶ After submitting a Deal Registration, view the status of the submitted Deal Registration in the **Approval History** related list at the bottom of the Deal Registration
- ▶ Possible status values:
 - Pending – RSA is reviewing Deal Registration submission
 - Approved – RSA approved the Deal Registration. Deal Registration will be converted to an Opportunity
 - Rejected – RSA rejected Deal Registration. Deal Registration can be worked as Lead or Partner can edit the original submission and resubmit (based on rejection reason)

Action	Date	Status	Assigned To	Overall Status
Step: AMR PSC (Pending for first approval)				 Pending
Approval Request Submitted	8/21/2010 5:31 AM	Pending	AMR PSC	
	8/21/2010 5:31 AM	Submitted	bill hewitt	

RSA Reviews Deal Registration

Approved Deal Registration



- ▶ When a Deal Registration is approved, the Lead is converted to an Opportunity
- ▶ Deal Registration Opportunities can be viewed using the *My Deal Registrations – Partners* list view on the Opportunities tab. A link to the Opportunity will display
- ▶ On the Opportunity, Partners can view the *Deal Reg Type* and *Deal Registration Code*

Note: It is possible to search by Deal Registration Code in the PRM Connect Tool

RSA SecurWorld™ Logout

Home Leads Accounts Contacts **Opportunities** Cases My Public Profile Goal Attainment Forms Reports

Search
Leads
Go!
Advanced Search
Create New...
Recent Items
Kirwin & Sons-Jacob Mahoney
Becky White
Bethany Lopes
Tim Crawford
Jacob Mahoney
Lindsay Bohdan

Opportunity
Kirwin & Sons-Jacob Mahoney
[Back to List: Opportunities](#) [Printable View](#)

Opportunity Detail [Edit](#) [Request to Close Won](#)

Account Name	Kirwin & Sons	Deal Registration	✓
Opportunity Name	Kirwin & Sons-Jacob Mahoney	Opportunity Owner	Mike Michalske [Change]
Partner Projected Amount	USD 1,000.00	Probability (%)	10%
		Stage	Discovery
		Expected Closed Date	8/18/2010

Deal Registration Information

Deal Registration Code	DR-003102	Deal Registration Status	Approved
Submission Date	8/21/2010	Expiration Date	12/18/2010
Approval Date	8/21/2010	Days Left Until Expiration	130
Deal Reg Type	Incremental	Link to Expiration Action	



RSA Reviews Deal Registration

Rejected Deal Registration



- ▶ When a Deal Registration is rejected, the rejection reason is captured on the Deal Registration. Possible rejection reasons are:
 - Already on the RSA Forecast
 - Already registered by another partner
 - Already registered by the same partner
 - Criteria Not Met
 - Ineligible Product
 - Insufficient License Quantity
 - Partner Not Authorized
 - Public Sector Rejection
 - Reject – Other
- ▶ Refer to the *Deal Reg Rejection Comments* field for additional context about the rejection

RSA Reviews Deal Registration

Rejected Deal Registration Continued



Deal Status		
Deal Registration Status	Rejected	Approval Date
Submission Date	6/14/2010	Expiration Date
Deal Reg Rejection Reasons	DR-Already registered by the same partner	Days Left Until Expiration
Deal Reg Rejection Comments	Partner already registered the deal in April, 2010	



System Actions to View Rejection Reason:

1. Click on the **Leads** tab
2. From the *View* drop-down, select the **My Deal Registrations** view
3. Click on the Deal Registration you want to view the status for
4. Scroll down to the *Deal Status* section on the record page

RSA Reviews Deal Registration

Resubmit Rejected Deal Registration



- ▶ When a Deal Registration is rejected, Partners can:
 - Continue to work the deal as a Lead in the PRM Connect Tool
 - Edit and re-submit the original submission for approval
- ▶ Deal Rejections with one of the below rejection reasons can be edited and resubmitted:
 - Criteria Not Met
 - Ineligible Product
 - Partner Not Authorized
 - Public Sector Rejection
 - Insufficient License Quantity
 - Reject – Other

RSA Reviews Deal Registration

Resubmit Rejected Deal Registration Continued



Lead Detail			
Edit Submit for Approval Clone Add Distributor			
Customer Information			
Company	Brybech	Lead Record Type	Deal Registration
Street		Lead Owner	bill hewitt [Change]
City	Naples	Lead Status	NEW
Country	USA	Dead Reason	



System Actions to Resubmit a Rejected Deal Registration:

1. Click on the **Leads** tab
2. From the *View* drop-down, select the **My Deal Registrations** view
3. Click on the Deal Registration you want to view the status for
4. Click on the **Edit** button at the top of the page
5. Make necessary edits. Click on the **Save** button
6. Click on the **Submit for Approval** button

RSA Reviews Deal Registration

Requesting an Extension



- ▶ When an Opportunity is within 45 days of expiration, a **Request Deal Extension** link will appear on the Opportunity
- ▶ Partners will also receive an email notifying them of the upcoming expiration
- ▶ If approved, the expiration date on the Opportunity will automatically update

Deal Registration Information			
Deal Registration Code	DR-003102	Deal Registration status	Approved
Submission Date	6/21/2010	Expiration Date	7/5/2010
Approval Date	6/21/2010	Days Left Until Expiration	14
Deal Reg Type	Incremental	Link to Expiration Action	Request Deal Extension

RSA Reviews Deal Registration

Requesting an Extension Continued



- ▶ Upon clicking the **Request Deal Extension** link, the Partner enters a request justification (required field)
- ▶ When the Partner saves the information entered, the form automatically populates the remaining information from the Opportunity

Deal Registration Extension Request Edit

Save Save & New Cancel

Information

Extension Request Justification I expect Deal to close in the next 30 days

Opportunity Kirwin & Sons-Jacob Mah

status

Requested Expiration Date

Country

Requester

Request Date

Current Expiration Date

Requestor Partner Account

Save Save & New Cancel

Deal Registration Extension Request Detail

Information

Extension Request Justification I expect Deal to close in the next 30 days

Opportunity Kirwin & Sons-Jacob Mahoney

status Submitted

Requested Expiration Date 1/1/2011

Global Region Americas

Country USA

Requestor bill hewitt

Request Date 8/21/2010

Current Expiration Date 7/5/2010

Requestor Partner Account Partner Brazil

Created By bill hewitt, 8/21/2010 6:06 AM

Last Modified By bill hewitt, 8/21/2010 6:06 AM

Highlighted information automatically populates



RSA Reviews Deal Registration

Expired Deal Registration



- ▶ When the expiration date has passed, the Opportunity will be marked as expired
- ▶ The Partner will receive an email notifying them of the expiration

Deal Registration Information			
Deal Registration Code	DR-003102	Deal Registration Status	Approved
Submission Date	6/21/2010	Expiration Date	6/18/2010
Approval Date	6/21/2010	Days Left Until Expiration	-3
Deal Reg Type	Incremental	Link to Expiration Action	Request Deal Re-registration

RSA Reviews Deal Registration

Request Deal Re-Registration



- ▶ When a Deal Registration has passed its expiration date, a **Request Deal Re-Registration** link appears on the Opportunity
 - The original submitter can click on the **Re-Registration** link to create a new registration for the expired deal
 - Clicking the link will take the user back to the Deal Registration page with basic information from the original Deal Registration pre-populated

Deal Registration Information			
Deal Registration Code	DR-003102	Deal Registration Status	Approved
Submission Date	6/21/2010	Expiration Date	6/18/2010
Approval Date	6/21/2010	Days Left Until Expiration	-3
Deal Reg Type	Incremental	Link to Expiration Action	Request Deal Re-registration

Partner Works Opportunity

Editable Fields on Opportunity



- ▶ When the Deal Registration is converted to an Opportunity, a select set of fields are editable:
 - Opportunity Name
 - Partner Projected Amount
 - Expected Close Date

Close Opportunity

Set Opportunity to Closed - Won



- ▶ Click on the **Closed – Won** button to request that the Opportunity be marked as Closed – Won. The Channel Manager will be notified when the *Closed – Won* button is selected.
- ▶ The Channel Manager will close the Opportunity on behalf of the Partner

Opportunity Detail			
		Edit	Request to Close Won
Account Name	Kirwin & Sons	Deal Registration	<input checked="" type="checkbox"/>
Opportunity Name	Kirwin & Sons-Jacob Mahoney	Opportunity Owner	Mike Michalske [Change]
Partner Projected Amount	USD 1,000.00	Probability (%)	10%
		Stage	Discovery
		Expected Closed Date	6/18/2010
Deal Registration Information			
Deal Registration Code	DR-003102	Deal Registration Status	Approved
Submission Date	6/21/2010	Expiration Date	8/23/2010
Approval Date	6/21/2010	Days Left Until Expiration	63
Deal Reg Type	Incremental	Link to Expiration Action	

Close Opportunity

Set Opportunity to Closed - Won



- ▶ If an Opportunity should be set to Closed – Lost, Partners should talk with their Channel Manager and communicate the status or create a Task on the Opportunity and assign it to the Channel Manager
- ▶ The Channel Manager will close the Opportunity on behalf of the Partner

Support Resources

▶ RSA Training Materials

- All training materials will be posted to RSA Partner Central at:
<http://powerlink.emc.com/km/appmanager/km/secureDesktop?internalId=0b0140668049097f>
 - Click on link to your region
 - Click on **PRM Connect Training** in the Channel Operations section

▶ Cases

- Submit a Case in **PRM Connect**
 1. Log into the PRM Connect Tool
 2. Click on the **Cases** tab
 3. Click on the **New Case** button





The Security Division of EMC