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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

Submit Deal Registration	RSA Reviews Deal Registration	Partner Works Opportunity
• Partner fills out Deal Registration form on the Leads tab or registers an existing Lead.	• RSA approves or rejects Deal Registration. • If rejected, Partner can work Lead or update and resubmit Deal Registration.	• Partner works Opportunity. • Partner requests Opportunity closure. • Channel Manager closes Opportunity and documents win/loss details.

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

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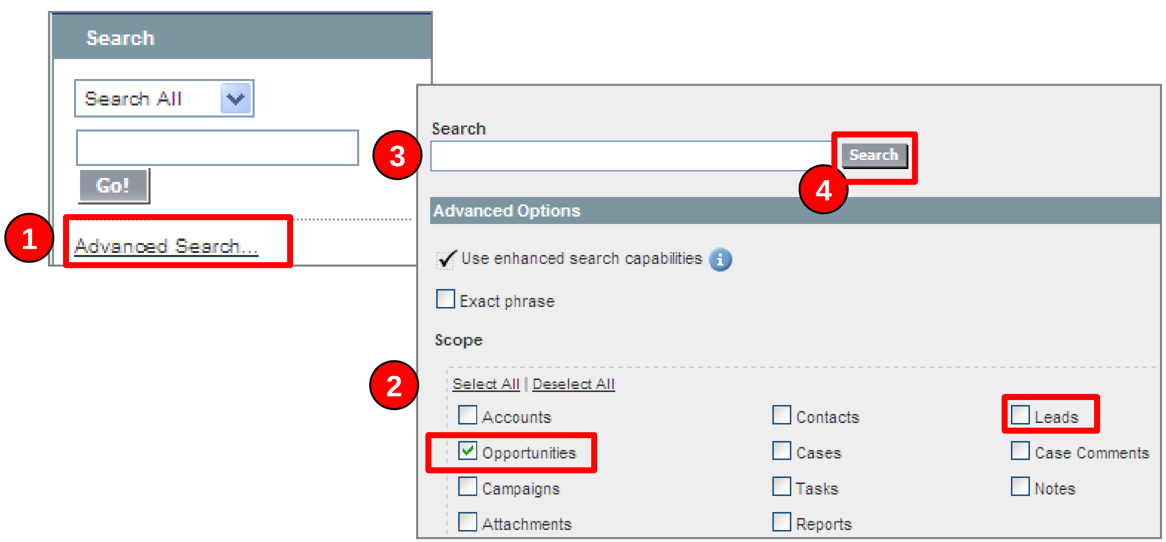
Searching for Deal Registrations

- 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



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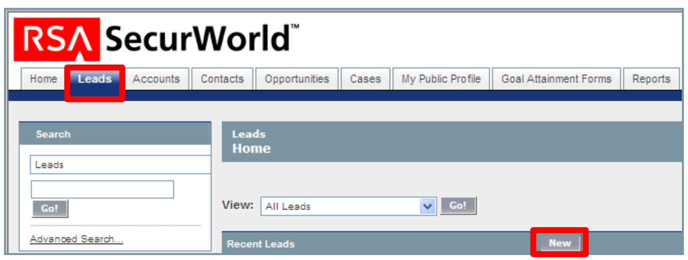
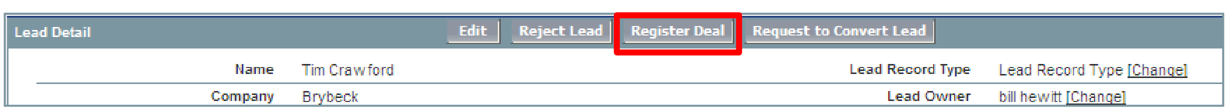
Deal Registration Origination

- 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



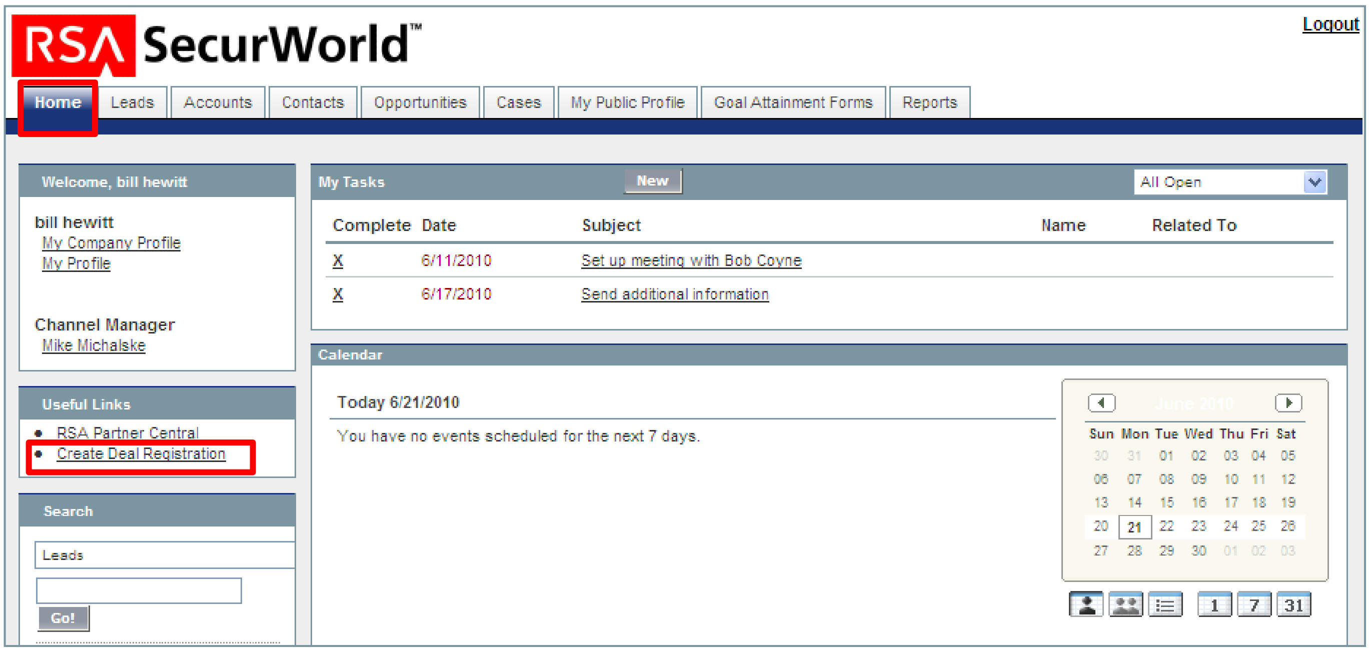
  3. Register an existing Lead



Submit Deal Registration

Create Deal Registration

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

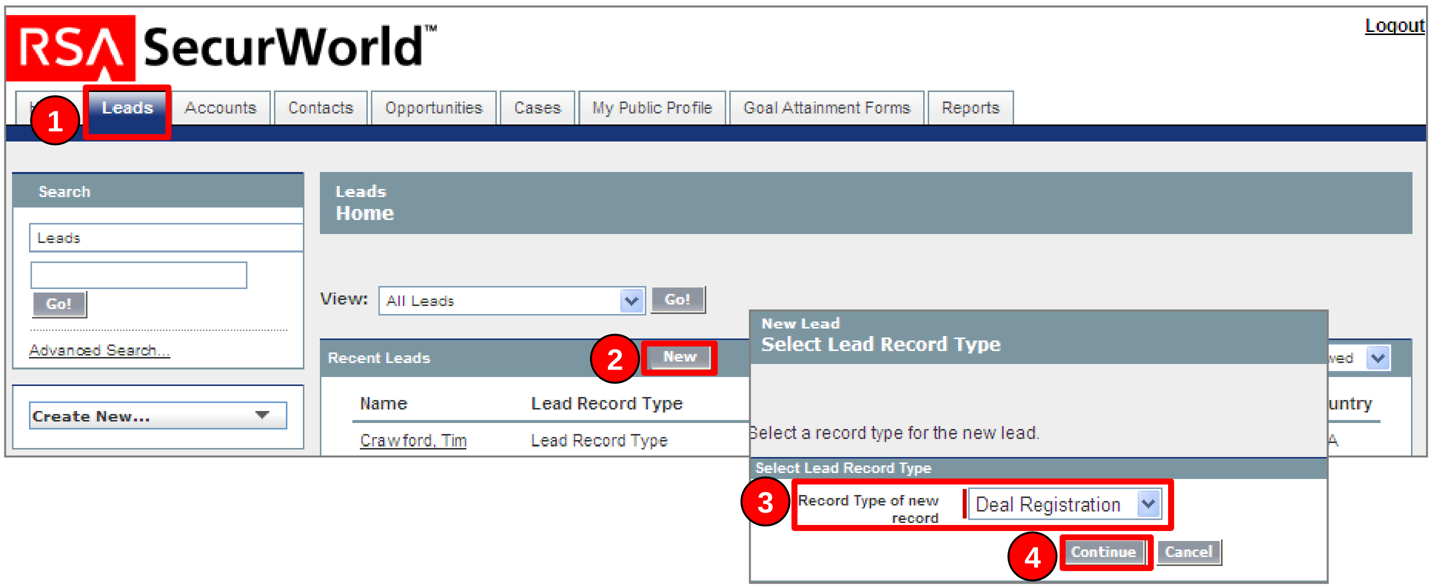


System Actions to Create a Deal Registration from the Sidebar:

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



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

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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

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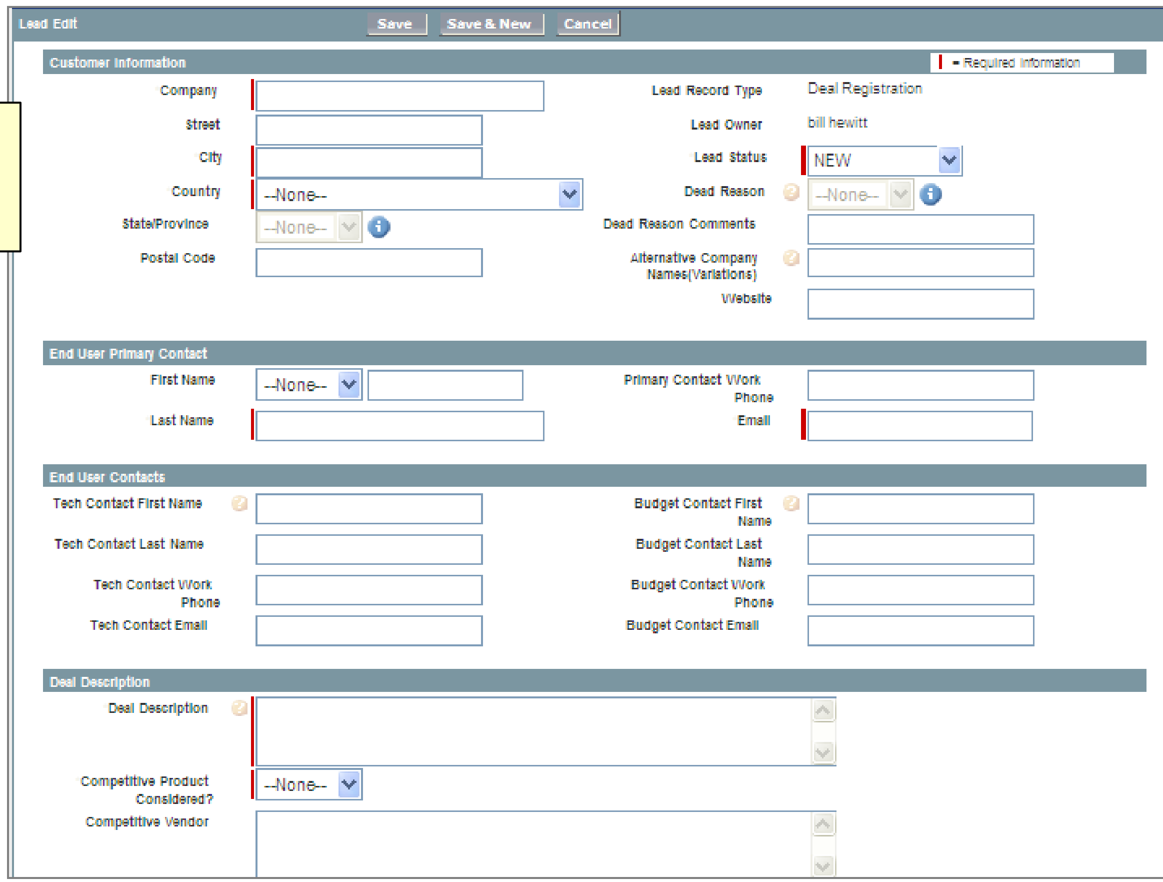
Submit Deal Registration

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		Lead Record Type	Deal Registration
Street		Lead Owner	bill hewitt
City		Lead Status	NEW
Country	--None--	Dead Reason	--None--
State/Province	--None--	Dead Reason Comments	
Postal Code		Alternative Company Names(Variations)	
		Website	

End User Primary Contact

First Name	--None--	Primary Contact Work Phone	
Last Name		Email	

End User Contacts

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

Deal Description

Deal Description	
Competitive Product Considered?	--None--
Competitive Vendor	

Required Fields are marked with a red bar.

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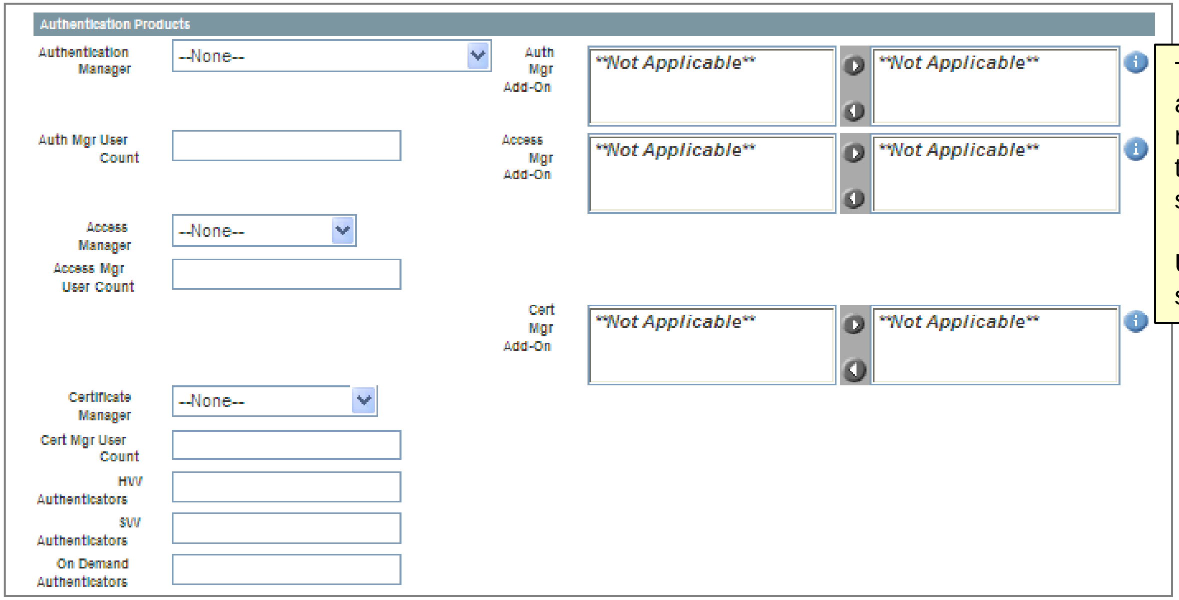
Submit Deal Registration

Filling out the Deal Registration Form

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



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**.**

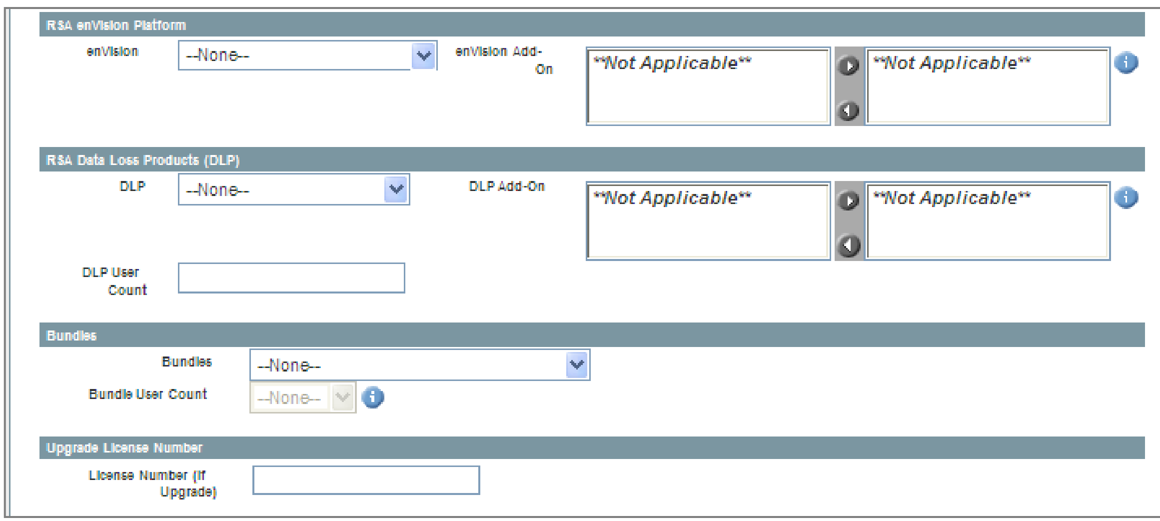
Submit Deal Registration

Filling out the Deal Registration Form

Submit Deal Registration → RSA Reviews Deal Registration → Partner Works Opportunity

- 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



RSA enVision Platform

enVision: --None--

enVision Add-On: **Not Applicable** | **Not Applicable**

RSA Data Loss Products (DLP)

DLP: --None--

DLP Add-On: **Not Applicable** | **Not Applicable**

DLP User Count

Bundles

Bundles: --None--

Bundle User Count: --None--

Upgrade License Number

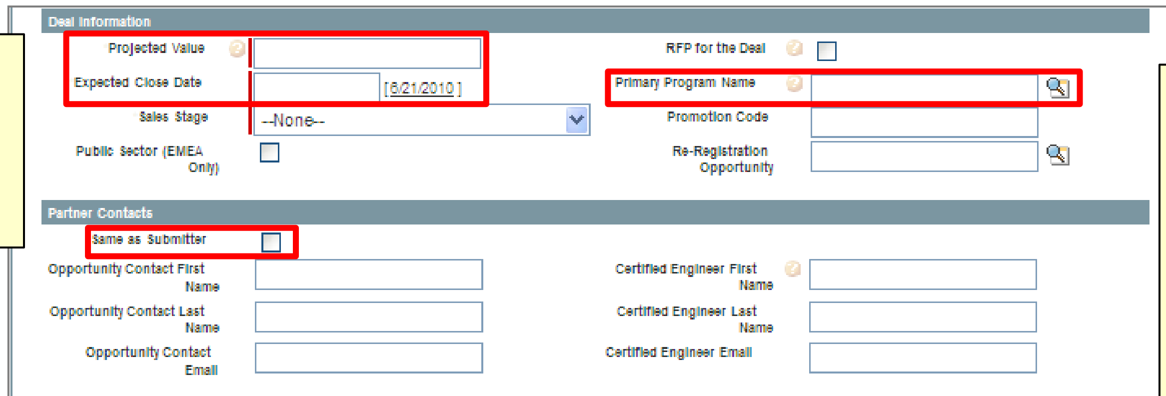
License Number (If Upgrade)

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.



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.

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.

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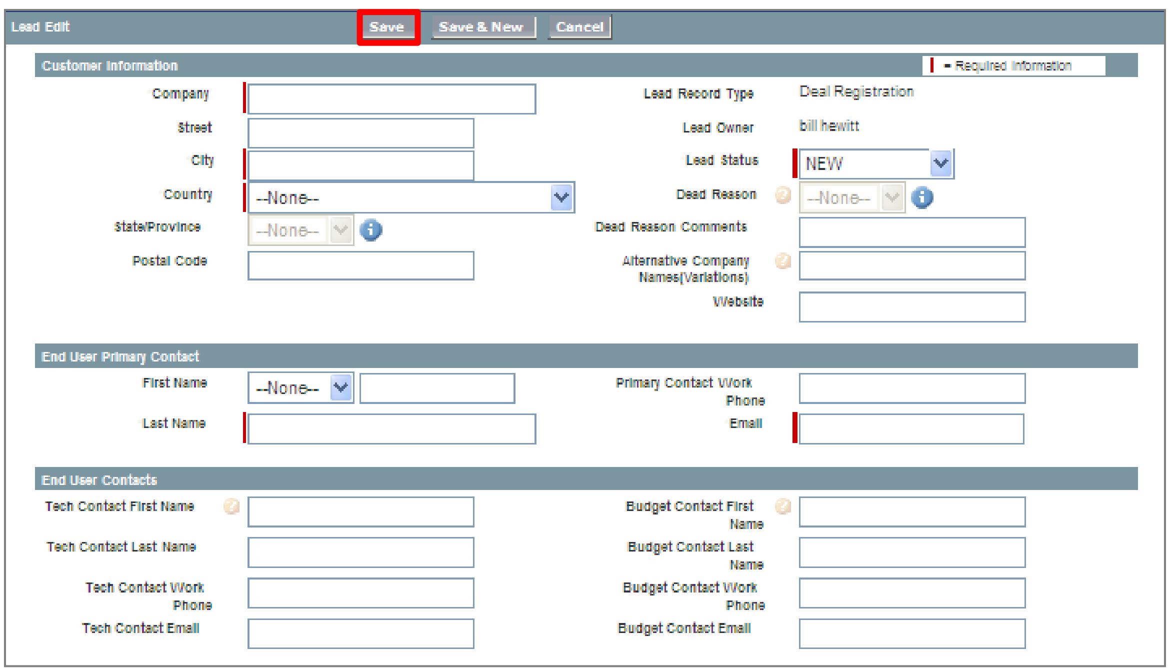
Submit Deal Registration

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



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

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

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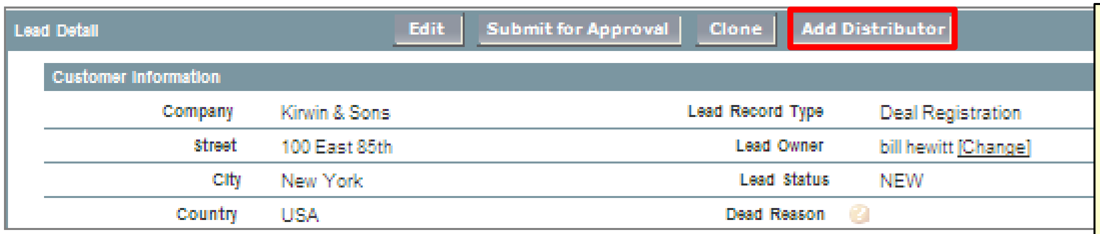
Submit Deal Registration
Add Distributor

- 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



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.

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Submit Deal Registration

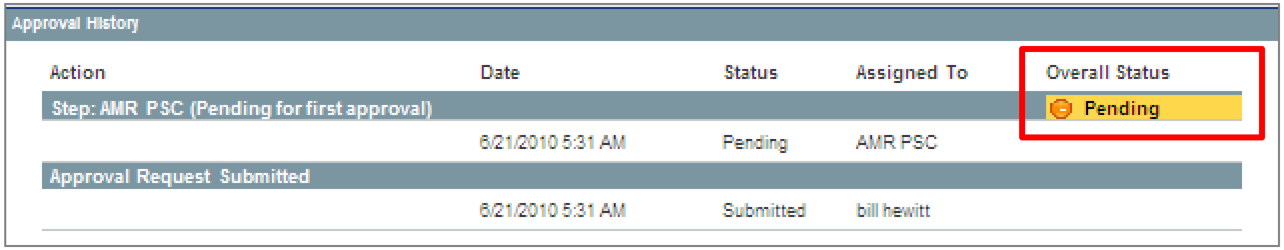
Submit Deal Registration for Approval

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

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)



Approval History

Action	Date	Status	Assigned To	Overall Status
Step: AMR PSC (Pending for first approval)				Pending
	6/21/2010 5:31 AM	Pending	AMR PSC	
Approval Request Submitted				
	6/21/2010 5:31 AM	Submitted	bill hewitt	

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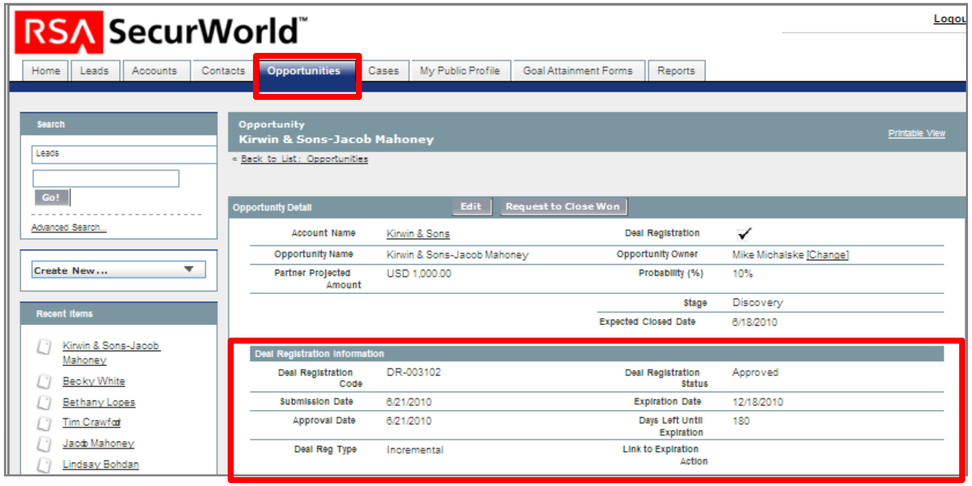
RSA Reviews Deal Registration

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



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RSA Reviews Deal Registration

Rejected Deal Registration

Submit Deal Registration → RSA Reviews Deal Registration → Partner Works Opportunity

- When a Deal Registration is rejected, the rejection reason is captured on the Deal Registration. Possible rejections 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

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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

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RSA Reviews Deal Registration

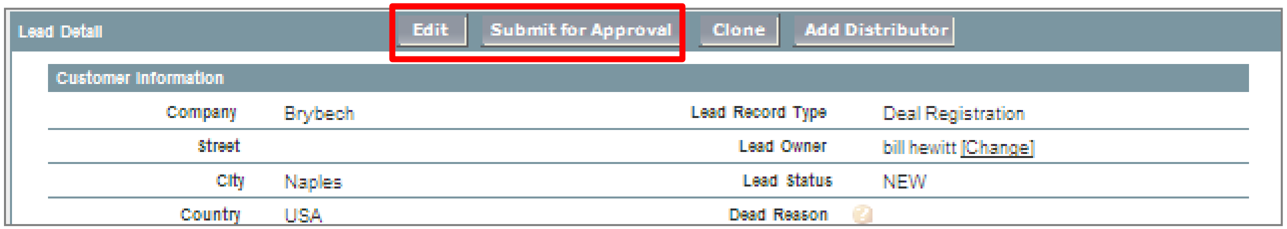
Resubmit Rejected Deal Registration

- 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

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Requesting an Extension

Submit Deal Registration → RSA Reviews Deal Registration → Partner Works Opportunity

- 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

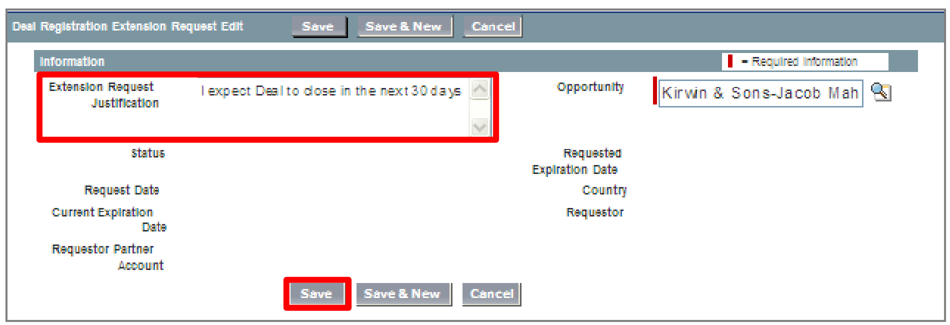
Deal Registration Information

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



Highlighted information automatically populates

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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

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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

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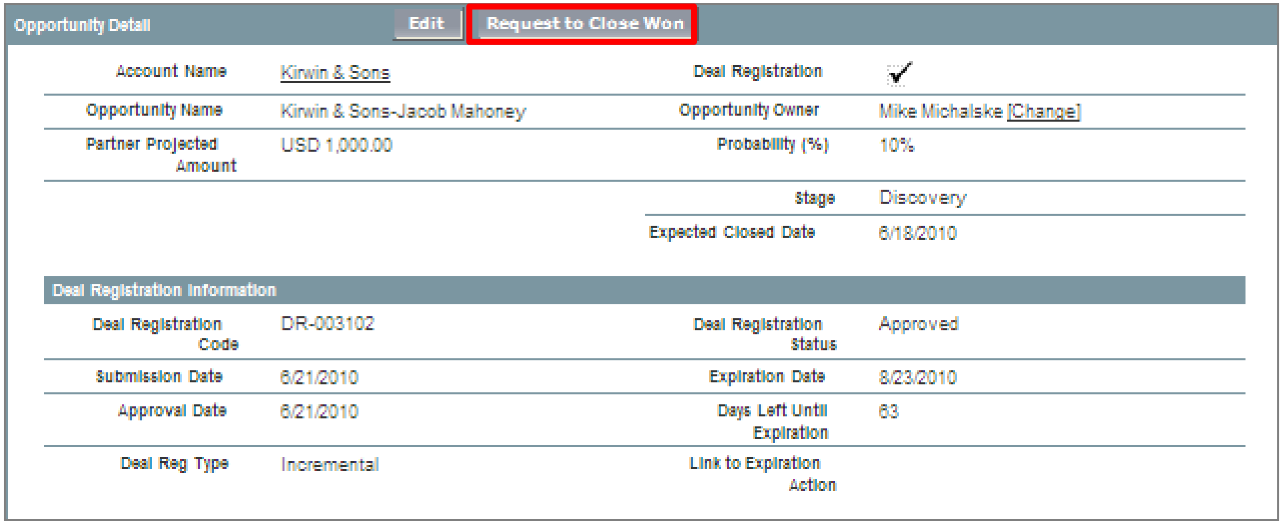
Close Opportunity
Set Opportunity to Closed - Won

- 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	✓
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

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