



PROGRAM GUIDE

ISG & CSG INCUMBENCY FOR COMMERCIAL SALES

A PREDICTABLE SALES ENGAGEMENT MODEL

Our vision is for partners to extend our reach into new and existing markets as a true extension of our entire salesforce. To achieve this, we understand how crucial a predictable sales engagement model is to our partners.

In October 2016, we introduced Line of Business Incumbency (LOBI) for Storage, which was our first step in marrying EMC's hard deck with Dell's Line of Business (LOB) Registration program. We are further expanding on this program with Infrastructure Solutions (ISG) and Client Solutions (CSG) Incumbency, in which we have identified a pool of end user accounts in which Dell EMC's direct sales teams will be held accountable for working with and through partners to drive and close business.

SIMPLE. PREDICTABLE. PROFITABLE.™

SIMPLE.

Accounts are clearly marked incumbent and fully tracked and managed within our internal systems | [Assures accountability for Dell EMC's sales teams to work with and through partners; not against them](#)

PREDICTABLE.

Within our ISG lines of business, incumbency for one LOB is granted across all three : Storage, Server, & Networking | [Energize cross-selling across entire datacenter solution.](#)

PROFITABLE.

In addition to ISG incumbency, CSG Incumbency is awarded based on net new business | [Protects client-focused partners from direct conflict and further encourages cross-selling](#)

Eligibility Criteria & Guidelines

Infrastructure Solutions Group (ISG)

Storage, Server, Networking

Client Solutions Group (CSG)

Historical Activity

Incumbency granted for all three LOBs for accounts that meet certain historical channel ISG mix criteria – *full ISG Incumbency (ISGi)*

N/A

Net new logos (new account)

Incumbency granted for all three LOBs if less than \$10K combined ISG revenue in the past 24 months – *full ISG Incumbency (ISGi)*

Incumbency granted if less than \$10K combined CSG revenue in the past 12 months – *full CSG Incumbency (CSGi)*

New lines of business (existing account)

Incumbency granted for individual LOBs (Storage, Server, or Networking) if less than \$10K in LOB revenue in the past 24 months – *Incumbency for specific ISG LOB*

Incumbency granted if less than \$10K combined CSG revenue in the past 12 months – *full CSG Incumbency (CSGi)*

PRODUCTS ELIGIBLE

Infrastructure Solutions	Storage Solutions
	<ul style="list-style-type: none"> Legacy Dell storage inclusive of PowerVault, EqualLogic, Compellent, XC Legacy EMC storage inclusive of VNX, XTREMIO Series, VMAX Series, DataDomain, Networker, Avamar, RecoverPoint, VPLEX, Isilon, VxRail, and VCE solutions (Vblock, VxBlock, VxRack)*
	Server Solutions
	Cloud Products, PowerEdge
Client Solutions	Networking Solutions
	Dell Networking
	Latitude, OptiPlex, Precision, XPS, and Vostro are included. Chromebooks, Inspiron, and Alienware are excluded.

**For the ISG historical look-back analysis, VCE, Isilon, and DataDomain were included. However, these solutions will not be operationalized to participate in the New logo/New LOB earned incumbency until later in the year.*

Incumbency Terms

Please review the eligibility details below for the ISG and CSG Incumbency Programs.

	Eligibility Criteria	Terms of Incumbency
Infrastructure Solutions <i>Storage, Server, Networking</i>	Historical Activity <ul style="list-style-type: none"> Commercial accounts only Must have particular channel mix across ISG lines of business 	<ul style="list-style-type: none"> For new LOBs within an existing customer, incumbency is granted for only the qualifying LOB In accounts identified as incumbent, Dell EMC direct sales must collaborate with a partner Ongoing requirements to maintain incumbency, including specific channel growth and cross-sell targets
	New Logos <ul style="list-style-type: none"> Commercial accounts only with less than \$10K in revenue in past 24 months Available only to Gold, Platinum, & Titanium partners 	
	New Logos <ul style="list-style-type: none"> Commercial accounts only with less than \$10K in revenue in past 12 months Includes Acquisition, Inside-led, & Greenfield/New Business accounts Available only to Gold, Platinum, & Titanium partners 	
Client Solutions	New Logos <ul style="list-style-type: none"> Commercial accounts only with less than \$10K in revenue in past 12 months Includes Acquisition, Inside-led, & Greenfield/New Business accounts Available only to Gold, Platinum, & Titanium partners 	<ul style="list-style-type: none"> In accounts identified as incumbent, Dell EMC direct sales must collaborate with a partner Ongoing requirements to maintain incumbency, including specific channel growth targets

Please note: Federal & Greater China are excluded from the program. There may also be exceptions for certain opportunities for accounts in the U.S. SLED space, along with other restrictions that may also apply; please refer to the FAQs for more details

Process Flow

DIRECT SALES INITIATED

Direct Team Identifies Opportunity in an Incumbent Account

- Direct rep reviews incumbency status in internal Salesforce instance
- Direct rep checks with Partner Account Manager to vet the right partner to engage on the opportunity

Direct Rep Initiates Partner Engagement Process

- Direct reps have visibility into historical partner revenue into the account across all lines of business
- Based on historical data (if applicable), direct reps engage with the partner to scope/develop the opportunity

PARTNER INITIATED

Partner Registers Opportunity & Engages Customer

- Partner registers an opportunity via the Deal Registration portal
- Standard Deal registration process & ROE apply
- Partner engages customer

Partner Closes Opportunity

- Direct sales teams support partner in sale
- Partner wins and closes opportunity
- Standard Dell EMC Partner Program incentives apply

Frequently Asked Questions

What is ISG & CSG Incumbency?

Previously Line of Business Incumbency (LOBI), ISG & CSG Incumbency is the new Dell EMC GTM sales engagement model in the Commercial account space that protects historical and future channel partner investments in their customers.

- For Infrastructure Solutions (ISG), which includes Server, Networking, and Storage, Incumbency looks at historical revenue within mid-market accounts (accounts that are serviced by Dell EMC's Commercial Sales Organization) as well as net new logos or lines of business.
- For Client Solutions (CSG), Incumbency looks at net new logos or lines of business only.

For these accounts that are deemed part of the incumbency pool, Dell EMC direct sales teams will not proactively pursue an opportunity, but will instead be held accountable for working with and through a channel partner to drive and close business.

"Dell EMC's Commercial Sales Organization" does not include the Federal or Consumer & Small Business Enterprise Sales Organizations

What solutions is ISG & CSG Incumbency available for?

As of October 15, 2016, incumbency was implemented for Storage/Backup solutions based on historical account protection. This program will continue to run in parallel with the new ISG and CSG Incumbency program that goes into effect May 22, 2017. In this new program, the following parameters apply:

- Incumbency for all three ISG lines of business (LOBs) – Storage, Server, Networking – for qualifying Commercial accounts based on the historical look-back period
- Incumbency for new logos/LOBs for Storage/Backup solutions, as well as Server & Networking solutions
 - Net new customers will qualify for incumbency for all three ISG lines of business, while expansions into new lines of business will receive incumbency per LOB
- CSG Incumbency based on new logos/lines of business for Client solutions

How were the "incumbent" accounts determined?

- For ISG (Storage, Server, and Networking) solutions, there is both a historical look-back period as well as a process for net new logos/LOBs.
 - Historical activity: Customers are deemed to be part of the pool of incumbent accounts if there is a certain mix of historical channel activity across ISG lines of business.
 - Net new logos/LOBs: Any net new logo or lines of business (where less than \$10K of Dell EMC products/services had been sold to the account in the last 24 months) will also be deemed to be part of the pool of incumbent accounts.
- For Client Solutions, incumbency is based upon new business only. Customers will be deemed to be part of the pool of incumbent accounts if they are a net new logo or new line of business within Dell EMC's Client Solutions portfolio (where less than \$10K of Dell EMC products/services had been sold to the account in the last 12 months). This is available for Acquisition, Inside-Led, and Net New/Greenfield Accounts only.
- Please note that Incumbency is granted for an entire LOB and not for a specific product.

When Does ISG & CSG Incumbency go into effect?

Incumbency for Storage based on the historical look-back period went into effect on October 15, 2016, which will run in parallel with the new ISG and CSG Incumbency model that goes into effect on May 22, 2017.

Frequently Asked Questions

Has the EMC hard deck gone away?

The EMC hard deck has evolved into this incumbency model. The hard deck was designed to create specific partner-led accounts and protect partner investment in those customers. Dell EMC will continue to offer protection through its incumbency model. This program will protect partner investments in mid-market commercial accounts where active partners have sold Dell EMC Storage (excluding VCE), Server, or Networking solutions previously, and into the future. It also protects partners who discover net new opportunities and customers for all ISG and CSG lines of business.

Will Partners receive a published list of all Incumbent accounts that qualify?

No, we will not be publishing a list of all of the end user accounts that qualify for Incumbency. It is the intent that the PAMs/NAMs and the Dell EMC sales reps will proactively communicate eligible accounts with their Partners as they strategically account plan and drive business. All eligible accounts will be identified in our internal Salesforce.com instances.

Will there be any exclusions or exceptions to ISG & CSG Incumbency?

Certain lines of business for certain end-user accounts shall not be available for incumbency. Dell reserves the right to approve or reject any Partner's submission for a LOB incumbency for whatever reason in its sole discretion. Notwithstanding, Dell may, at its discretion, quote or bid for a deal in the following scenarios:

- If the end-user requests that Dell quote or bid on the deal;
- If the end-user has rejected the Partner's bid or quote;
- If the end-user uses Dell online sources, such as Premier Pages, to receive pricing.

Are there any ongoing requirements in order for end user accounts to maintain their incumbent status?

Yes. For Infrastructure solutions, the channel mix within these end user accounts must grow at a higher rate than any direct sales into the account. There will also be multi-LOB targets set for each account.

For Client solutions, there will be annual Statement of Work (SOW) assessments required in order to maintain incumbency

What will happen with the current Line of Business Registration (LOB) program?

The LOB Registration program will be deactivated at the time of the ISG and CSG incumbency launch, which is May 22, 2017. Starting May 22, no new LOB Registrations will be granted. Any existing LOB Registrations will expire on July 1, 2017, if they are not yet closed.

How does new logo/new LOB incumbency get granted? Do partners need to request incumbency on any such account?

This will be an automated process as deals are discovered by partners and brought to Dell EMC, particularly through the Deal Registration program. Incumbency will be reviewed on a quarterly basis and based on closed/won deals, certain accounts will receive incumbency for certain LOBs. There is no special request that the partners need to provide. Once incumbency is granted within an account after the quarterly review, it will be flagged in our internal Salesforce instance for tracking, and the PAMs/NAMs will be provided an updated list that they can review with their respective partners.

FAQs (ctd.) & Contacts/Support

Is there an end date for ISG or CSG Incumbency?

Not today; however Dell EMC reserves the right to change program definition and program duration at any time.

How will we avoid direct teams quoting on incumbent flagged accounts?

There will be a weekly governance report tracking any violations, which will be provided to our regional SSP leads. This program is also fully incorporated and referenced in our Channel Rules of Engagement.

CONTACTS / SUPPORT

Please leverage the partner support contacts listed below.

Deal Registrations:

United States & Canada: NA_Deal_Registration@Dell.com

Europe, Middle East, Africa: EMEA.DellEMC.DealRegistration@Dell.com

Latin / South America: LATAM_Deal_Registration@dell.com

China: China_DealRegistration_Desk@Dell.com

Hong Kong / Taiwan: HKTW_DealRegistration_Desk@dell.com

India: INDIA_Deal_Registration@Dell.com

Japan: JPPartnerDeal@Dell.com

Korea: KR_Deal_Registration@Dell.com

Australia & New Zealand: ANZ_Deal_Registration@dell.com

South Asia: SAT_Deal_Registration@Dell.com

Partner Experience Center (PXC):

Submit a case here: <http://emc.force.com/createPSCcase>