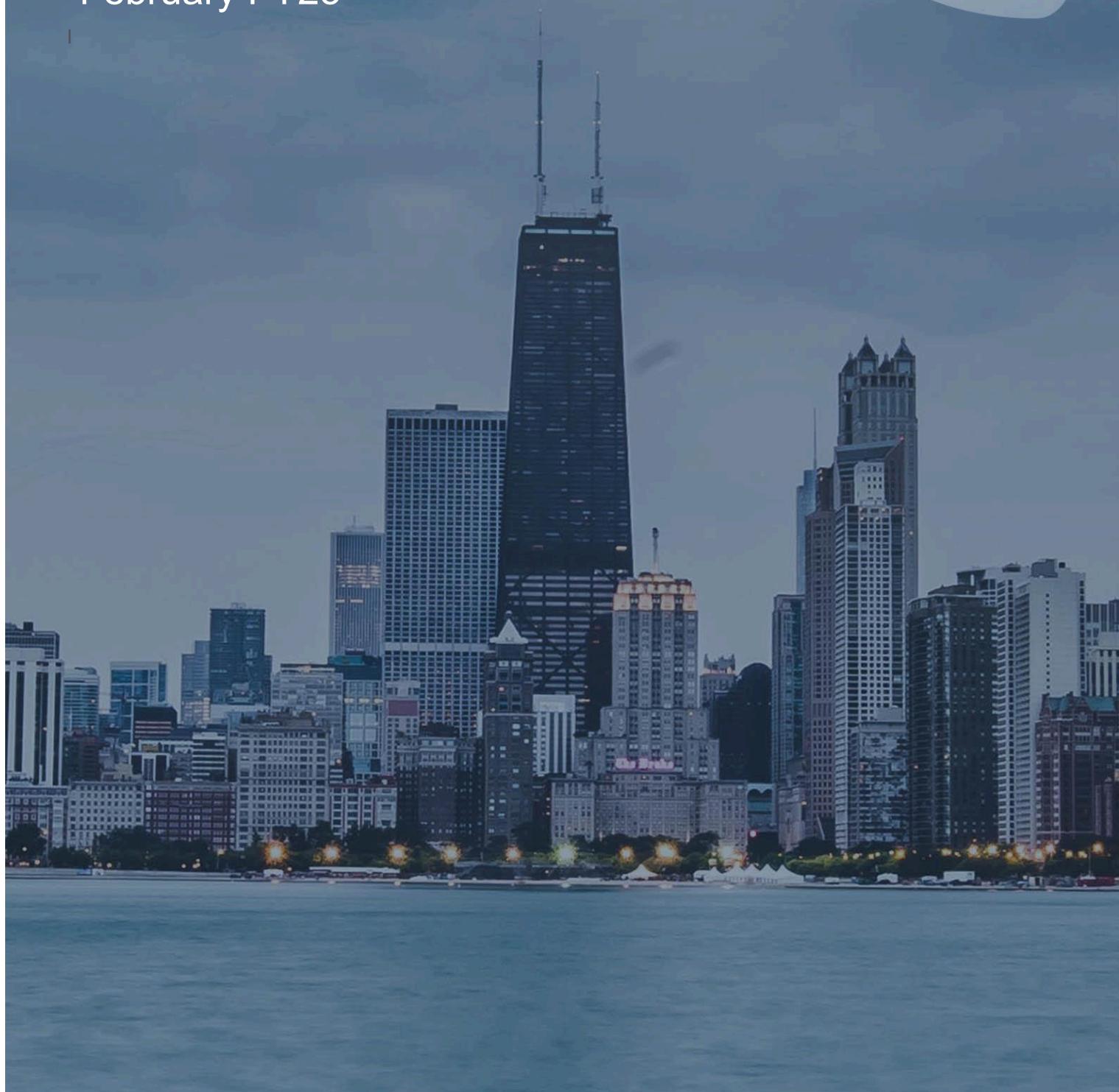




Infovista Sales Playbook

February FY25





Copyright 2025 Infovista SAS

All rights reserved

Infovista is a trademark of Infovista SAS.

The information contained in this document is the property of Infovista. No part of this publication may be reproduced in any form (including photocopying or electronic storage on any medium) or by any other means or used to make any derivative work (such as translation, transformation, or adaptation) without the express written permission of Infovista. Legal action will be taken against any infringement.

The information contained in this document is subject to change without notice and does not carry any contractual obligation for Infovista. Infovista reserves the right to make changes to any products or services described in this document at any time without notice. Infovista shall not be held responsible for the direct or indirect consequences of the use of the information contained in this document.

Applications for written permission to reproduce any part of this publication should be addressed to Infovista at the address indicated below.

Brand and product names mentioned in this publication may be registered trademarks or trademarks of their respective holders.

Infovista SAS
3 rue Christophe Colomb
91300 Massy, France
www.infovista.com

Contents

1	Introduction.....	4
1.1	Sales Flow Cadence.....	5
1.2	Sales Organizational Structure.....	5
1.3	Revenue Operations Organizational Structure.....	6
1.4	Our Product Portfolio.....	6
2	Marketing Leads.....	8
2.1	Organizational structure and introduction.....	8
2.2	Key Definitions.....	9
2.3	How to qualify MQLs and Marketing opportunities.....	11
3	Pipeline and Forecast.....	14
3.1	Regional Organizational structure.....	14
3.2	Salesforce Framework.....	15
3.3	Pipeline.....	28
3.4	Detailed Sales Process.....	33
3.5	Forecast and Business Management.....	39
3.6	Best Practices.....	42
4	Pre-Sales.....	44
4.1	Organizational Structure and introduction.....	44
4.2	Solution Description Document.....	45
4.3	RFP Bid Process.....	47
4.4	POC process.....	47
5	Professional Services.....	48
5.1	Organizational Structure and introduction.....	48
5.2	Professional Services Offering.....	49
5.3	Role of the Professional Services SME on the Opportunity Team.....	53
6	Maintenance.....	54
6.1	Organizational structure.....	54
6.2	Maintenance forecast File Components, Owners, Cadence.....	55

6.3	Maintenance KPIs.....	56
6.4	Weekly Forecast File Assembly.....	60
6.5	Customer Service.....	61
7	Global Revenue Management.....	61
7.1	Business Management, Order Processing, Supply Fulfillment.....	61
7.2	Quote to Cash Collection.....	64
7.3	Revenue Recognition standards.....	65
7.4	Credit Management.....	68
8	Sales Compensation.....	70
8.1	Xactly.....	70
8.2	Credits.....	74
8.3	Commissions.....	74
8.4	Payments.....	75
9	Other topics.....	77
9.1	SFDC Dashboards.....	78
9.2	Compliance with Embargoed Countries Regulations.....	78
9.3	Tools at Infovista.....	78
9.4	Revenue Operations Activities.....	82
9.5	Admin Policy.....	84
9.6	Helpful contacts and links.....	85
9.7	Glossary / KPIs.....	86

1 Introduction

Welcome to the Infovista Sales Playbook!

Here you can find relevant information to support your Sales activity. This Playbook provides you with information related to the Opportunity Management Processes, Forecast Policy, Rules of Engagement, and other activities to make sure you are always in control to achieve your sales quota.

These rules and processes must be followed and respected and must be applied to all types of opportunities. Salesforce.com (SFDC), our CRM System of record, allows for the creation and management of all opportunities. By adhering to these processes, we can follow the evolution of all our sales opportunities. As the saying goes: "If an opportunity is not in SFDC, it does not exist."

High-performance sales organizations have a rigorous forecast policy and follow a clear pipeline management process. Companies following these processes will:

- Consistently achieve or overachieve all target goals including quotas, budgets, etc.
- Have better control of the risks associated with forecasts, anticipating issues, and planning the necessary actions to overcome them
- Create a "winning" sales culture and an attitude towards success
- Increase the accuracy and linearity of the forecasts
- Improve sales efficiency, increase the number of deals per salesperson, increasing the deal size, and reducing the sales cycle.

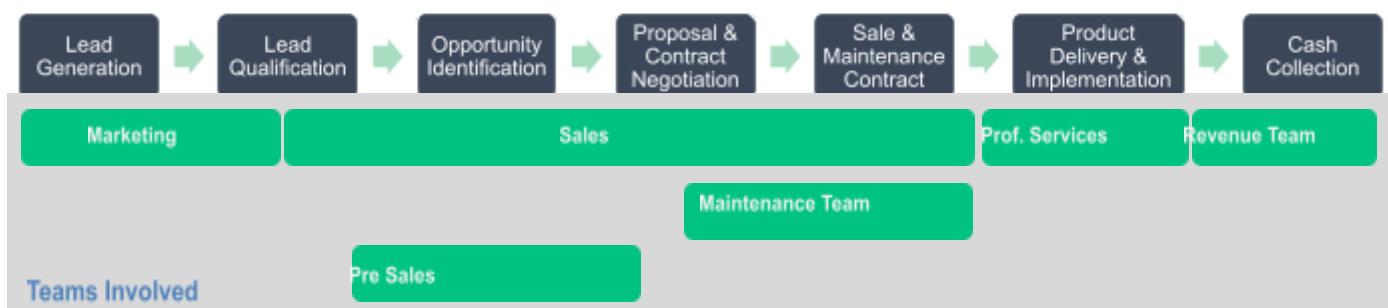
The efficiency in the execution of our processes and compliance with company policy typically enables you to maximize customer facing time, a key benefit of this ethos allows you to increase customer engagement, trust, and intimacy. In the end, the way we operate will have an impact on the company and most importantly our CUSTOMERS.

At the end of this document, please refer to the glossary when necessary.

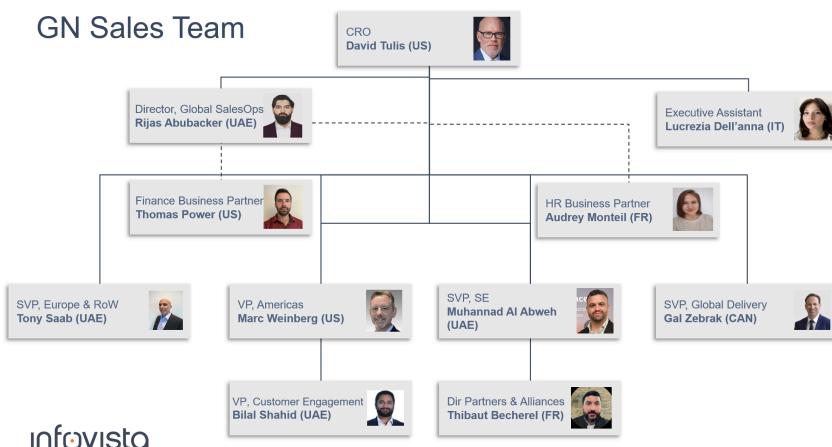
1.1 Sales Flow Cadence

A well-defined sales flow provides a systematic approach to engaging with prospects, understanding their needs, presenting solutions, and ultimately convincing them to make a purchase. It plays a crucial role in optimizing the sales outreach process and ensuring that prospects receive relevant information at the right intervals.

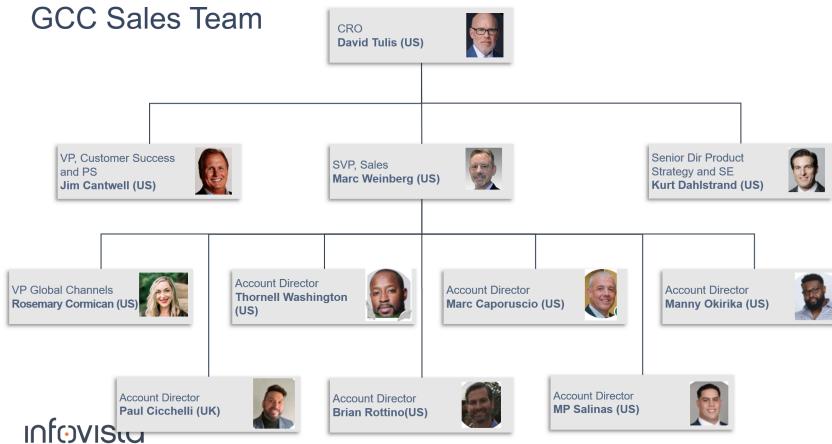
Below is the flow of Sales Process within Infovista, from **Lead Generation** to the **Cash collection** along with the teams involved. The chapters in this guide are structured to go along this flow, introducing each Team and their associated processes & involvements.



1.2 Sales Organizational Structure



GCC Sales Team



12

Goals of the Sales organization:

The Sales organization has different objectives – primary ones are as followed:

- Achieve quota target
- Improve pipe and lead conversion & pipe coverage
- Reduce sales cycle
- Increase repeat business
- Increase forecast accuracy
- Improve business linearity
- Improve margins and favorable cash collection terms

1.3 Revenue Operations Organizational Structure

graph

If you need to reach out to the Revenue Ops team, send an email to the distribution list:
sales_ops@infovista.com.

1.4 Our Product Portfolio

The Infovista portfolio empowers CSPs and Enterprises to enhance their network, service, and customer experience intelligence, driving efficiency, cost savings, and revenue acceleration.

RAN Engineering Suite:

Planet Suite is our portfolio of solutions to address every aspect of planning and optimizing your RAN network whether it be just 5G, or a combination of multiple technologies. Leveraging decades of expertise in radio and backhaul network modeling and underpinned by extensive automation, 3D simulations and machine learning, Planet Suite helps to deliver the best wireless network - one that reliably provides the exceptional subscriber experience for the possible lowest cost.



Our RAN Engineering portfolio is composed of the following products:

- [Planet](#): Deliver radio designs with the World's first AI-powered planning solution.
- [Planet Cloud](#): Provides use case-centric radio planning capabilities at scale.
- [Ellipse](#): Design backhaul network topologies, capacity and latency to support 5G.
- [Geodata](#): Accurately model wireless network with modern geodata sets.

Network Testing Suite:

TEMS Suite is our portfolio of solutions that address every aspect of testing and troubleshooting network from a subscriber's perspective, whether it be just 5G or a combination of multiple technologies. If our customers are looking to verify the performance of new 5G sites, walk test strategic indoor locations, benchmark network performance against their competitors, or any one of numerous other network testing use cases, TEMS has a solution to meet their needs.

Our TEMS portfolio is composed of the following products:

- [TEMS Investigation](#): Drive testing solution for initial tuning, 5G site acceptance, software upgrade verification, new feature validation, network troubleshooting, etc.
- [TEMS Pocket](#): Walk test indoor locations and drone test hard-to-reach places.
- [TEMS Paragon](#): Multi-device benchmarking solution that enables customers to compare the service quality of their network to the competition.
- [TEMS Sense](#): Phone-based remote testing solution delivering fully automated monitoring and real-time analytics from locations across the network.
- [TEMS Discovery](#): Wireless industry's most comprehensive network analytics and optimization solution based on mobile network testing data.
- [TEMS Cloud](#): Centralized back-office to plan and manage multiple network testing projects in one place.

Ativa Suite:

Infovista Ativa™ is a suite of cloud-native modules for the automated assurance of fixed, mobile, legacy and advanced cloudified networks. The modules, which can be deployed independently or in combination, correlate experience, service quality and resource performance to deliver end-to-end automated assurance through a single pane of glass. It improves the efficiency of network and service management processes by providing 360° actionable intelligence across digital experiences, apps, services, networks and infrastructure.

Our Ativa™ portfolio is composed of the following products:

- [Ativa App](#): Delivers real-time actionable intelligence across network technologies and the underlying applications and network functions performance.
- [Ativa Net](#): Provides automated alerting and advanced drill-down troubleshooting capabilities to enable rapid response to emerging problems.
- [Ativa Experience](#): Delivers actionable insights into subscribers' experience to proactively monitor, identify, prioritize and resolve any customer-impacting issue.
- [Ativa Automated Ops](#): Incorporates advanced cross-product correlation into our customers network and service operations for real-time anomaly detection and root-cause analysis.

Hammer Portfolio:

The Hammer portfolio provides complete visibility across the entire CX environment of our customers so they can identify and resolve contact center technology issues before they cause downtime, outages, and customer churn. Our products and services are designed to bring businesses closer to their customers. They are made to ensure they keep control and enhance their contact center. So, it truly delivers satisfaction, retention, renewals and wallet share.

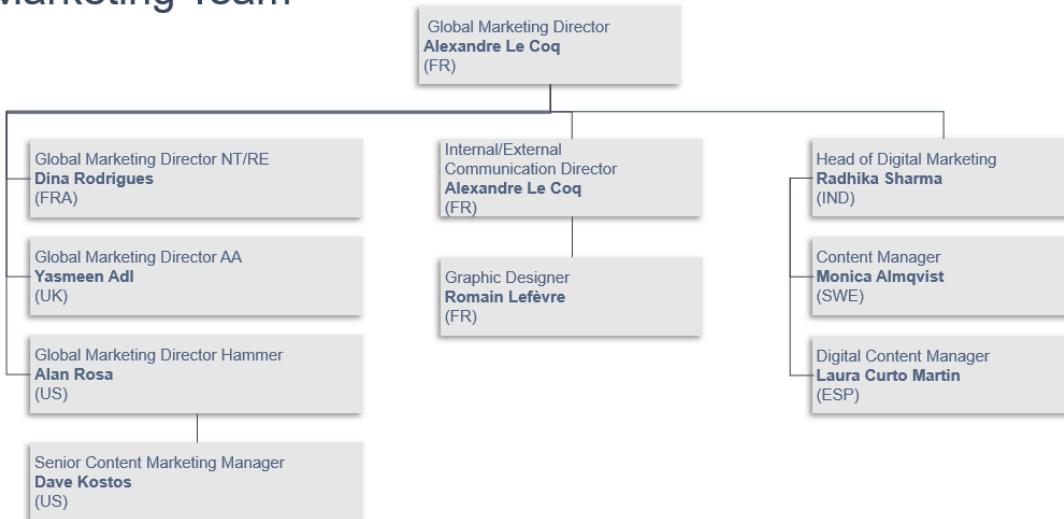
Our Hammer portfolio is composed of the following products:

- [Hammer Voice Explorer](#): Test and monitor Interactive Voice Response (IVR) performance.
- [Hammer CallMaster](#): Test development, debug, scheduling, and reporting across the entire testing life cycle.
- [Hammer On-Demand Performance Testing](#): Carry out rapid automated and comprehensive testing for any scenario.
- [Hammer On-Demand Quality Assurance](#): Conduct on-demand and frequent performance testing.
- [HammerRTC](#): Virtual agent simulation for Amazon Connect, NiceCXOne, and Genesys Cloud platforms.
- [VoiceWatch](#): Provides End-to-End monitoring of interaction and Acoustic Fingerprinting to verify prompts.
- [Hammer Edge](#): Offers complete transparency into agent and workforce experience and system performance with a multi-perspective test measurement approach.

2 Marketing Leads

2.1 Organizational structure and introduction

Marketing Team



If you need to reach out to the Marketing team, send an email to the distribution list: [Marketing](#)

Role of the Marketing Team:

The goal of the Marketing team is to generate qualified Leads, meaning Leads who have shown an interest in at least one product from the Infovista or Hammer portfolio. Marketing Qualified Leads are

sent to the different Sales teams for further qualification and aim to be transformed as new opportunities. The Marketing team keeps track of qualified Leads assigned to each account director and their evolution every week. MQLs created each week are reviewed during the weekly regional forecast calls.

2.2 Key Definitions

Marketing Qualified Lead (MQL)

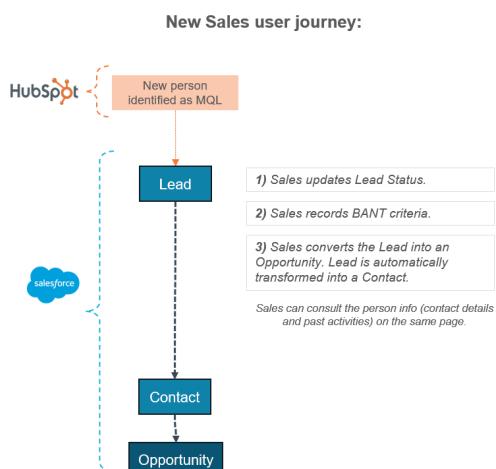
- Person from a targeted account or targeted region who has shown a direct interest for Infovista products through Marketing campaigns that could be either a:
 1. **Direct request MQL:** people sending a contact/ demo request via the Infovista website or via an incoming phone call or incoming email.
 2. **Events & Telemarketing MQL:** people who attended an event, a workshop, or a webinar.
- At this point, a Lead is created in Salesforce and further qualification via phone or email is required before creating an opportunity.

Marketing opportunity

- Pre-qualified deal from a targeted account or targeted region.
- With an attached contact who has shown a direct interest for Infovista products through Marketing campaigns.
- For whom at least 3 out of 4 BANT have been identified (Budget/ Authority/ Need/ Time) by an account director or an inside sale rep or an external telemarketing agency.
- At this point, an opportunity at Discovery stage (10%) is created in Salesforce.

Lead Assignment

Leads are generated through Marketing campaigns and are first registered using HubSpot. MQLs are automatically created and if the right BANT criteria are met, they can become an opportunity.



Lead Routine for MQLs:

- Lead submitting a AA direct contact request→ Rayan Salha and Yasmeen Adl

- Lead submitting a NT or RE direct contact request → CoE Lead Queue
- Lead from a Named Account or strategic alliances no matter the product → Account director in charge of the account
- Lead submitting a Hammer direct contact request → Matthew DeGrace

Marketing details available in Salesforce:

- A **Salesforce notification** with a direct Salesforce link is sent when a new MQL Lead is assigned to you.
- A **Personalized view** for MQLs is available:
 - To access it, go to the tab “Leads” and look for the view named “My MQL Leads”
 - It will show only open MQLs assigned to you.

The screenshot shows two views of the Sales Console. On the left, the navigation bar is visible with a dropdown menu. The 'Leads' option is highlighted with a red circle and has a red arrow pointing to the right. On the right, the 'Recently Viewed' list is displayed, showing various leads and opportunities. The 'My MQL Leads' entry is circled in red, indicating it is the personalized view mentioned in the text.

The screenshot shows the Leads page with the title 'My MQL Leads'. The table displays four items, each with a checkbox, Name, Company, Email, Phone, Mobile, and Title. The data is as follows:

	Name ↑	Company	Email	Phone	Mobile	Title
1	Greg Schultz	City National Bank	greg.schultz@cnb.com	15209070408		VP Voice Services
2	Kartik Murthy	Reliance Industries Limited	kartik1.murthy@ril.com	8828403124		Senior Manager - Engineering RIL
3	Rodolfo Delgado	Claro Costa Rica	rodolfo.delgado@claro.cr	(+502) 58261776		Ingeniero de Proyectos, Radio Fr
4	Shane House	BHP	shane.house@bhp.com	0437146443		Network Optimization Technician

2.3 How to qualify MQLs and Marketing opportunities

MQL created from (Information gathered by Marketing)

Lead/Contact Stage	Marketing Qualified Lead	Web Form Subject	Demo request
Lead Status	Not Started	Web Form Type	Product/ Solutions information
Reason		Web Form Message	Hi, we're investigating the options for 4/5g measurements before and after implementation of a private network. Would TEMS Pocket be suitable for this? And do you have a local partner in the Netherlands?
Product Interest	Network Testing	Selected Company Type	System integrator
Marketing Origin	Website Organic traffic	Selected Company Sub-Type	
		Comments	High Priority - Contact submitted a direct request form.

1st Step: Qualify the MQL

Lead owner must update the field “Lead Status” using the following values to reflect state of the Sales qualification (Select a value on the Arrow Path to update the Lead Status, then click Mark as Current Status to save):

- **Not Started** (default value): This is the initial status of the MQL. MQL has been created but the owner hasn't started to work on it yet.
- **In progress**: Lead owner is currently reaching out or is already in touch with the prospect and is looking for BANT criteria.
- **Completed - No BANT**: Lead owner reached out to the contact but didn't find at least 3 BANT criteria.
- **Closed, Existing Opportunity**: Lead owner identified that the MQL is related to an existing opportunity. When this status is selected, Lead owner must add the name of the existing opportunity under the field “Existing Opportunity”.
- **Closed, Account out of scope**: Lead owner found out that the contact and account is out of scope.
- **Closed, Not reachable**: Lead owner can't reach out to the prospect after several attempts.
- **Converted (or Closed, New Opportunity)**: Lead owner reached out to the contact and identified at least 3 BANT criteria. Owner has or will create an opportunity.
- **Differed – To be call back within less than 12 months**: Lead owner reached out to the contact who mentioned being interested by our product but in few months only.

Service Level Agreement for MQL Qualifications:

- For MQLs flagged as **High Priority - Contact submitted a direct request form**. > Account director has **24 working hours** to start the qualification process and change from “Not Started” to “In progress” status of the MQL Lead.
- For MQLs flagged as **Medium Priority - Contact attended an event or webinar**. > Account director has **48 working hours** to start the qualification process and change from “Not Started” to “In progress” status of the MQL Lead.

2nd step: Add BANT criteria if found:

Lead owner should also add BANT criteria when identified:

- Budget
- Authority
- Needs
- Time
- Description (free text): add here any details about the project or comments following your discussion with the person.

An opportunity should be created when at least 3 out 4 BANT have been identified.

▼ BANT found during Sales qualification (Information to be filled in by Sales)

Budget i	Description
Authority i	Business Line i
Needs i	Use Case i
Time	Existing Opportunity i

3rd step: Create a new Marketing opportunity then qualify it

To create a new Marketing opportunity:

1. Select the Lead Status 'Converted'
2. Click on 'Select Converted Status'

In the new window automatically opened by Salesforce:

1. Create New Account or Choose existing Account
2. Create New Contact or Choose existing Contact
3. Rename the opportunity
4. Select the Record Type CSP
5. Click Convert

Usual opportunity creation rules shared by the SalesOps team apply here too.

Then, the owner of the opportunity moves it to the pipe as usual until it is Close Won or Close Lost.

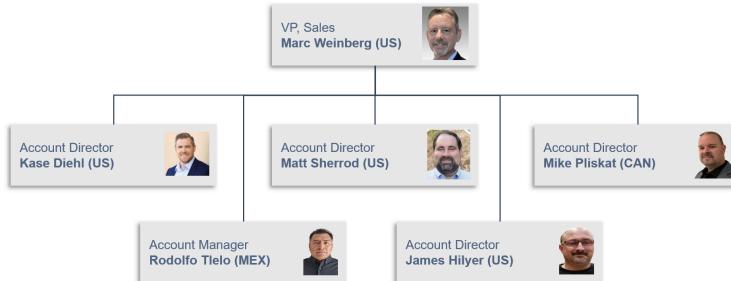
Best practices:

- Before creating a new opportunity, check in the 'Related Leads & Contacts components' if a Contact already exists. If yes, make sure to select this existing Contact when creating the opportunity.
- Before creating a new account, always do a quick search to verify that the account doesn't exist.
- Before creating a new opportunity, verify that an opportunity for the same account and same product doesn't already exist (especially if you are not in charge of the account).

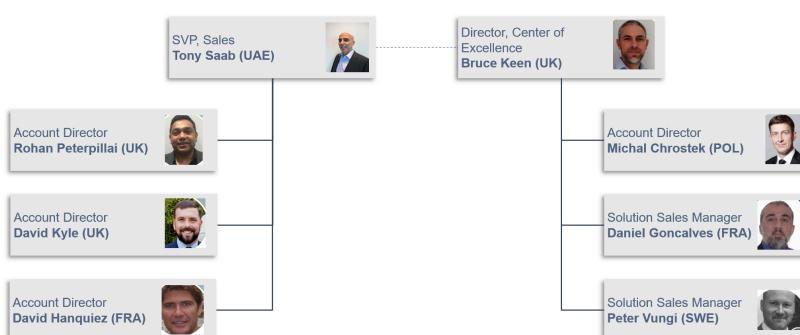
3 Pipeline and Forecast

3.1 Regional Organizational structure

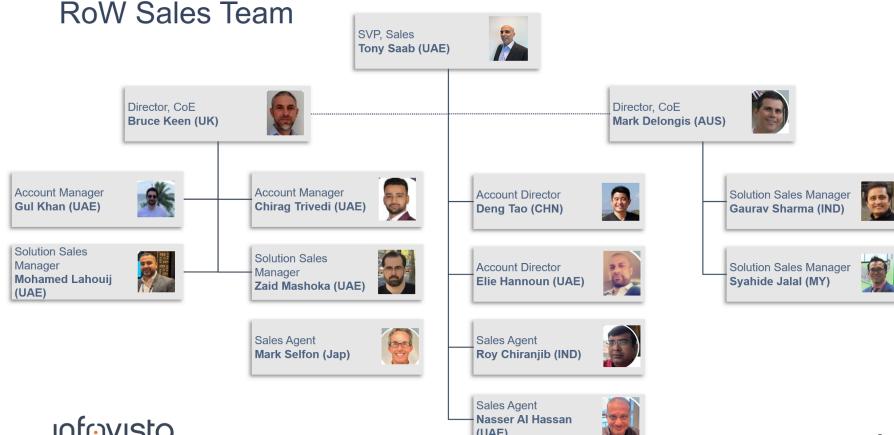
Americas Sales Team



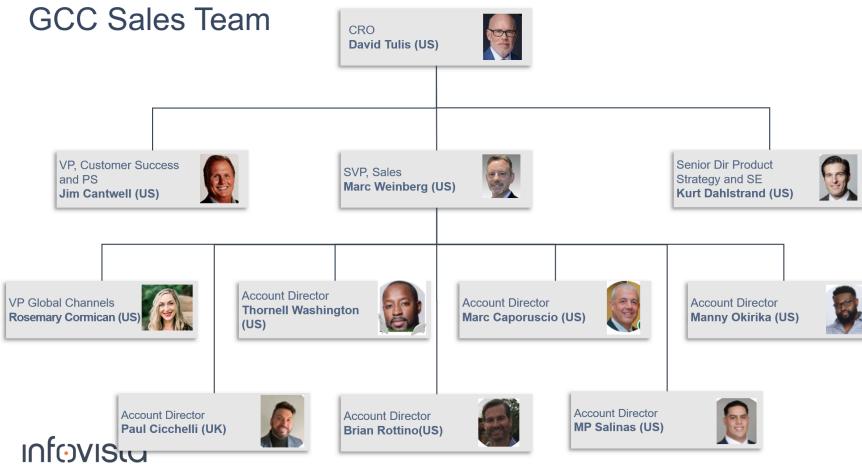
Europe Sales Team



RoW Sales Team



GCC Sales Team



12

3.2 Salesforce Framework

SFDC Fields Definitions

SFDC Field	Definition
Account Name	Name of End-user/customer using the solution
Account Region	Automated field based on where the Billing Country of the Account is
Age	Age of an opportunity when it was closed
Billing Country	Country of where the account is billed
Business Unit	Global Networks or GCC
Business Unit Team	Regional Sales Teams reporting with a VP head of each hierachal team reporting to a SVP
Close Month	Month oppy was closed
Created Date	Date when opportunity was created
Distributer	Partners who sells our solution to other resellers
Fiscal Period	Fiscal period when oppy was closed. Each Fiscal year is divided into 4 quarters
Fiscal Year	Fiscal year when oppy was closed (fiscal year starts on July 1st)
Industry	Industry where the Account is in; Drop down pick list
Opportunity "SFID" or "ID"	Unique Opportunity Identifier number or code
Opportunity Name	Naming Convention of every Opportunity must follow: <Account name> - <Reseller (if applicable)> - <Product sub family name> - <sales type (e.g. expansion, migration, upgrade, swap, FOC, etc.)> - <phase (if applicable, e.g. phase 1,2,3)>
Opportunity Owner	Despite its name, this field is used for exceptions and does not roll up to the respective VPs
Opportunity Overlay Owner	Represents the actual owner in SFDC who gets the quota retirement. This field rolls up to the "Business Unit Team" and hence the VPs
Opportunity Record Type	"CSP" : Opportunities containing NT, RE or AA products "GCC" : Opportunities containing Hammer products "Maintenance Renewal" : Opportunities for Maintenance and Term Renewals only
Product Revenue Type	(1): Software Products (incl Cloud and Custom Dev); (2) Services (incl Consulting and Training), (3) Maintenance (New & Renewals)
Product Category	Further break down of above
Product Family	Network Testing, RAN Engineering, Automated Assurance, Experience Assurance, Service Assurance, Hammer
Product Name	Product name of each oppy product line

Product Sub Family	Sub family of the three products (NT, RE and AA)
Relationship	Relationship with Account can be Customer, Former Customer, Potential Partner, Partner, Competitor, Vendor (for FF) and Intercompany. Vendor Accounts can only be used by Accounting Team
Revenues	While the value of Opportunities reflects the BOOKINGS value, revenues are also forecasted. Revenues are made up of 2 components: Bookship: Bookship refers to deals that have been booked and revenues recognized within the same quarter. Dependencies includes Equipment availability and shipment, credit state of end-users etc. Backlog: Backlog are deals that were booked in previous quarters, but revenues are recognized in the current reporting quarter.
Reseller	Partners who sell our solution to the end-user. A reseller can resell products/services or deliver its offer through MSP. Use \$Direct to denote a sale done directly ie not via resellers.
Stage Duration	The number of days the opportunity has been in its current Stage
Total Price	Value of each opportunity product line in Bookings
Type	Splits between New Customer or Existing Customer (Project Expansion, New Product, Renewal)
Provided by Marketing	Field to check "Yes" if the opportunity comes from a Marketing initiative
Primary Contact	Name of the contact which leads to the creation of the opportunity
DCP (Deal Closure Plan)	Section created to give us complete visibility into the customer's decision and approval process well in advance, so we can avoid unforeseen challenges and consequently close the deal successfully. More details further on in the document.

Deal Closure Plan (DCP)

Deal Closure Plans are critical for complex deals with multiple authorizers, a formal signoff process, and commercial and legal processes with customer procurement. As such, the DCP section in SFDC is to help ensure that you have all the resources required. Your corresponding partner, such as Product Manager (PM) and Professional Services (PS) will also help complete this section. Most importantly, a deal-close plan gives us complete visibility into the customer's decision and approval process well in advance so that we can avoid unforeseen challenges.

The DCP section is a separate tab in each opportunity (**snapshot 1**). The first section, "Indicators" (**snapshot 2**), are drop-down values where you select the most appropriate value to represent your deal. Next to each field is a help button to guide you on completing it. The indicators on the left must be completed by the account directors and those on the right by the other relevant departments. It will be your responsibility, when creating the DCP, to let the other departments know they need to update their indicators.

The following section is a large free text field for you to complete your plan to close your deal (**snapshot 3**). On the right (**snapshot 4**), you'll see a guide on completing this section. But if you have any questions, do not hesitate to contact your manager or sales ops partner.

Our **BEST PRACTICE** is to have a deal closure plan for all deals. It is mandatory for **AA deals above €250k**, and **NT/RE Deals above €150k**.

Snapshot 1:

Sales Focus	Details	Related	Quotes	Marketing	Deal Closure	Legal Agreements
-------------	---------	---------	--------	-----------	---------------------	------------------

Indicators

Compelling Event Status i	Product Readiness i
Compelling Event Description i	Deployment Complexity i

Snapshot 2:

Sales Focus	Details	Related	Quotes	Marketing	Deal Closure	Legal Agreements
Indicators						
Compelling Event Status ⓘ					Product Readiness ⓘ	
Compelling Event Description ⓘ					Deployment Complexity ⓘ	
Budget Allocation ⓘ					Deployment Complexity-Reason Code ⓘ	
Political relationship status ⓘ					PS Summary ⓘ	

Snapshot 3:

Deal Closure Plan

Deal Closure Plan Info

Verdana 10 Font Size Color B I U Text Color Text Alignment Text Justification Text Distribution Text Spacing Text Transformation Text Effects Text Box Text Line

Snapshot 4:

Deal Closure Template

Activity Chatter

Deal Closure Notes

1. List Key Deal Milestones – Time Schedule and Deal Closure Plan towards PO Issuance
 - a. Action: ; Deadline: DD.MM.YYYY; Owner: Status ;
 - i. Action: ; Deadline: DD.MM.YYYY; Owner: Status ;
 - ii. Action: ; Deadline: DD.MM.YYYY; Owner: Status ;
 - iii. Action: ; Deadline: DD.MM.YYYY; Owner: Status ;
 - iv. Add more fields
 - v.
2. Consider covering next mandatory points in the action plan:

Internal Dependencies:

1. Feature gaps identified, aligned with PM and roadmap is available; Release Dependency
 - a. Workshop / Demo / PoC plan and completion date
 - b. Solution description / LoE / Sizing docs finalized
 - c. RFP schedule / Bid Defense / deadlines (if applicable)

Customer / Sales Dependencies:

1. Stakeholders identification and Executive Bridging plan
 - a. Competitive Analysis and differentiation strategy development plan
 - b. Customer process to come to a buying decision
 - c. Quote sending target deadline
 - d. Negotiation Round #1, #2 ..etc
 - e. PO issuance target deadline

3. Comment on important win plan points:

1. What is customer's supplier evaluation Criteria - Technical Score / Commercial Score / Metrics: []
 - a. What is our pricing strategy: []
 - b. What is our pricing position compared to competitors' offerings: []

Opportunity Creation Process

When creating a new Opportunity, the Opportunity Record Type refers to the following products:

- **CSP:** For Opportunities with NT/RE/AA products
- **Contact Center:** For Opportunities with Hammer products only
- **Maintenance Renewal:** For Maintenance and Term Renewal Opportunities only

New Opportunity

www.infovista.com | 17



For Opportunities that have Klerity, NT, SA and RE products



For Opportunities with Hammer products only

For Maintenance and Term Renewal Opportunities only

- Opportunity Name** – Must be in the format of <Account name> - <Reseller (if applicable)> -

▼ Opportunity Information

Opportunity Name	1.	Amount	
Opportunity Owner	2.	SW Qtr BookShip	
Opportunity Overlay Owner	3.	Opportunity Currency	
Business Unit Team	4.	EUR - Euro	
Type	5.	Stage	
Opportunity Currency		Probability (%)	
EUR - Euro		Forecast Category	
Close Date	6.	Win/Lost Category	
Closed Quarter		Win/Lost Reason	
Opportunity Close Fiscal Quarter			
Quote Status			
Max Stage			

<Product sub family name> - <sales type (e.g. expansion, migration, upgrade, swap, FOC, etc.)> - <phase (if applicable, e.g. phase 1,2,3)>

- Opportunity Owner** – Despite its name, this field is used for exceptions and does not roll up to the respective VPs
- Opportunity Overlay Owner** – Represents the actual owner in SFDC who gets the quota retirement. This field rolls up to the “Business Unit Team” and hence the VPs
- Business Unit Team** – Refers to your role hierarchy and it is automatically populated according to your profile
- Type** – New or Existing Customer (New – only for new logos)
- Close Date** – Ensure it is not set in the past (update frequently)
- Stage** – Select accurate stages per IV sales funnel
- Probability** – Updated automatically once the stage is selected
- Forecast category** – It is determined by the oppy owner

▼ Accounts

Account Name	10	Distributor	11.
Bill to Customer		Reseller	12.
Ship to Customer			

- Account Name** – Account name needs to be the final end-user. Also, please CHECK before creating accounts (do not create duplicated accounts)
- Distributor** – Distributor is a 3rd party reseller who resells our solutions to another reseller.

You can leave it blank if there isn't one

12. **Reseller** – Reseller is a partner who resells our solutions to the customer (end-user)

Quote Workflow

3.2.1.1 Quote Creation Process

1. Select Primary Quote to sync quote to Oppy.
2. Choose the Infovista Entity (Pertaining to the region of the customer).
3. Set payment terms.
4. Set term to 12 (minimum duration per our T&C) or if there is an overriding duration agreed with the customer you can change it for each line or group of lines.
5. Choose currency.
6. Bill to and ship to contacts and their addresses from Oppy will be used.

Sales Focus Details Related **Quotes** Marketing Deal Closure Legal Agreements

New Quote Created

Primary 6. Back Edit Quote Now

Leaving the Primary Quote tick box ticked will result in this new Quote replacing any existing Primary Quote (if any) and therefore changing the opportunity forecast. You can untick now and then make the quote primary later when it is developed.

* Company 2.

* Payment Terms 3.

* Invoicing Period 1. --None--"/>

* Subscription Term 4.

* Start Date 5.

* Quote Currency 6.

Create Quote

3.2.1.2 Quote Items – Product/Prices

Once the Quote is created, we can add Products and optionally group them, using the highlighted buttons below.

Q-23078
Edit Quote

Add Products Add Group Delete Lines Quick Save Calculate Cancel Save

CPQ Quote Information

Additional Disc. (%) <input type="text"/>	Start Date <input type="text" value="11/12/2023"/> <input type="button" value=""/>	Subscription Term <input type="text" value="12"/>
Target Customer Amount <input type="text"/>	Opportunity Name <input type="text" value="Shaw - Phase 3 Dark Fibre SOW - VistaInsight"/>	Gross Margin <input type="text" value="0.00%"/>

This quote has no line items. Click on Add Products button to select products.

3.2.1.3 Product Office / Pricelist

Quote Items, here after referred to as Sales Objects, may or may not be available to Quote in CPQ. Please refer to the price list [file](#) to know the available Sales Objects per Product /Sub-Products, license type (perpetual/Term) etc..

However, please reach out to Product Office team in case of :

- Adding a Product / Sales Object
- Modify a Product / Sales Object (eg: price, cost etc)

FOC – Free of charge opportunity

There are two main categories of FOCs:

1. Pure commercial decision to provide customers with additional product(s) to satisfy a missing item or payment issue. These examples include commercial gestures; correction of oversight or missing products; solving for product acceptance or payment, etc.
2. Product feature issue or limitation. This could be to resolve a customer dissatisfaction issue for a feature that moved to another product, license issues, etc.

Any replace or repair nonfunctioning products is not an FOC. It follows the RMA process. However, if customer support cannot process the RMA (i.e., non-supported, out of contract, etc.), the account director may see to use FOC option 1 above to still process the resolution. However, it becomes a pure commercial/finance matter.

The CPQ/SF process for FOC requires checking the FOC box in the Deal Notes section, obtaining an approved zero-value quote, and including "FOC" in the opportunity name field. No purchase order (PO) is needed. Additionally, commissions are not paid for FOC transactions, and below IV terms and conditions apply:

5.7.3 Free of Charge ("FOC") Policy

The FOC Policy only applies to Sales Employees and Sales VP. There are 2 (two) main types of FOCs:

- A purely commercial gesture ("PC FOC") to provide customer with additional product(s) to address missing item or payment issue. Examples include commercial gesture, correcting oversight or missing products, and resolving product acceptance or payment issues.
 - This requires approvals from the Sales management and CFO
- Product or support feature issues including limitation that could affect customer satisfaction issue such as features that moved to another product, license issues, etc.
 - This requires approvals from the Support team

Any replacement or repair of nonfunctioning products is not considered as FOC and must follow the Return Merchandise Authorization ("RMA") process. However, if customer support cannot process the RMA (e.g., due to lack of support or being out of contract, etc.), the Sales Employee may seek to use the Pure commercial gesture / decision option to process the resolution.

In a case of a PC FOC, there will be a commission impact which will be reflected as a reduction in the next commission period:

- The commission reduction will be based on the List Price of the FOC item(s) with a fixed 50% discount applied to determine the net sales value. The Sales Employee's base commission rate will then be applied to this net sales value to determine the commission reduction amount.
- Quota credit will NOT be affected. This will only be a commission reduction / clawback
- This commission clawback shall only be applied to the Account Director and the Sales VP.

The FOC quote shall still be initiated via CPQ.

CPQ Approval Workflow

Good and strong business practices, teamwork, knowledge and ethical conduct are always behind winners.

Being our Account Directors and Sales VP's the front face to the customer, they are requested to submit for approval, according to the existing Delegation of Authority (part of Infovista code of conduct), all requirements prior to submitting the offers to the customer.

It is critical that everything is in place to have each, and every opportunity ready for immediate final negotiation and closing. As such, it is required that all the approvers, according to the Delegation of Authority, provide guidelines and approvals for the boundaries under which the Sales colleagues can negotiate with customer.

In case during the negotiation, it is foreseen that the requirements will go beyond those already approved, please immediately involve the respective approvers to find the right arguments and alignment on revised approved conditions.

Please find below the CPQ approval workflow:

	Triggers	Sales VP	SVP SE	CRO Office	Product Mgmt	MX Directors	PS Regional Directors	SVP, Delivery	Geodata Mgr	Supply & Rev Mgmt
SW	Aggregate Own IP (excl. SaaS/Cloud & Custom Dev) Discount	> 20%	> 40%	> 40%	> 50%					
	Aggregate SW Products Discount (to capture FOC)	> 99%	> 99%	> 99%						> 99%
	Aggregate Appliance Margin	View only	View only	View only						<35%
	Aggregate 3 rd Party (incl. Scanners) Margin	View only	View only	View only						<40%
MX	MX discount % > 0	Y		Y		Y				
PS	PS FP Margin	<30%	<25%	<25%			Y	Y		
	PS T&M Discount	>15%	>15%	>15%			>15%	>15%		
Others	SaaS/Cloud, Custom Dev	Y	Y	Y	Y		Y	Y		Y
	Custom HW Part Numbers	View only	View only	View only						Y
	Geodata	Y						Y	Y	
	Payment Terms	View only		View only						>60 days

Duplicated Opportunities

It is important that you do not create duplicated opportunities; for example, creating multiple opportunities for a single deal or closing one and creating another similar one in its place. When faced with deals that contain various scenarios, always create one opportunity, and then adapt / update the necessary fields such as "Billed to" / "Ship to" / "Supply chain" / "Resellers / Distributors" etc.

Multiple CPQ quotes can be created in a single opportunity; but remember to tag the most likely quote as

the primary and sync it with your opportunity. If you are unable to decide what is the most likely option, we recommend that you choose the lowest/ worst case scenario. Also keep in mind that by default the system sets the new quote to be primary, but if you are not ready for this, please untick the “Primary” tick box during the creation of the quote.

Account and Opportunity Teams

All ADs have global visibility to all accounts, i.e., they can view the account and respective information. However, they will only have ‘Edit’ access to the deals that they are owners or are part of the Opportunity Team. To have full access to all opportunities (view & edit), they need to be part of the “Account Team” – Sales Ops shall assist with this upon necessary approvals from VPs.

Opportunity Teams allow various team members to work on the opportunity. When they are added as part of the Opportunity Team, they will have read and write access to the opportunity. This dispenses the need for transferring the opportunity back and forth.

SFDC Hygiene

Ensuring good Salesforce hygiene is paramount for organizations leveraging the platform to manage customer relationships and streamline business processes. Salesforce serves as the nerve center for data-driven decision-making, making it imperative to maintain clean, accurate, and organized data. Regular data cleansing, validation, and governance practices are essential to prevent inaccuracies, redundancies, and outdated information. A disciplined approach to Salesforce hygiene not only enhances user experience but also fuels precise reporting, forecasting, and analytics, contributing to overall business success.

Sales Operations team will be assisting Account Directors by sending weekly reminders with specific deals which do not respect the rules outlined below. Account Directors should keep in mind that you should clean up all the pipeline mentioned above before your next forecast call.

1. CPQ Quotes

- a. CQ Negotiation or *In Buying Process* Deals, CPQ must be “**in Review**” or “**Approved**”
- b. CQ Commit Deals, CPQ must be “**in Review**” or “**Approved**”
- c. CQ Upside Deals, CPQ must be at least ‘**In Draft**’
 - i. You will note now that there is a validation rule in SFDC that will prevent you from moving stages if your CPQ quote is not in the right category
- d. The quote that closely reflects the forecast should be tagged as “**Primary**” in CPQ

2. Stages and Forecast Category

- a. CQ Commit Deals, stage must be in “**Negotiation**” or above
- b. CQ Upside Deals, stage must be in “**Proposal Development**” or above
- c. CQ deals cannot be **Unqualified**
- d. CQ deals must be in *Commit* or *Upside*

3. 3rd Month (i.e. last month) of the quarter

- a. In the last month of the quarter, CQ AA deals (€200k and above) must be in “**Negotiation**” or above
- b. In the last month of the quarter, CQ NT/RE deals (€150k and above) must be in “**Proposal Development**” or above

- c. Avoid having deals towards the end of the quarter (last 2/3 business days)

4. Others

- a. Ensure there are no deals with close date in the past – **no exceptions**
- b. AA deals that are more than 12 months old need to be reviewed and updated
- c. NT/RE deals that are more than 9 months old need to be reviewed and updated
- d. Pipe should be balanced distributed per quarter
- e. Every oppy should have the right contacts associated (*i.e.* decision maker, procurement, approval and engineer contacts)
- f. is mandatory to have a Deal Closure Plan (DCP) for AA deals above €250k, and NT/RE Deals above €150k

5. Accurate usage of fields:

- a. **Account Name:** always the End-user using our solution
- b. **Reseller:** Partners who sell our solution to the end-user / Customer. A reseller can resell products / services or deliver its offer through MSP
- c. 'Bill to customer' and 'Ship to customer' fields shouldn't be empty for CQ deals

6. Naming convention

- a. Naming Convention of every Opportunity must follow: <Account name> - <Reseller (*if applicable*)> - <Product sub family name> - <sales type (*e.g. expansion, migration, upgrade, swap, FOC, etc.*)> - <phase (*if applicable, e.g. phase 1,2,3*)>

SFDC Reports

Salesforce (SFDC) reports provide a comprehensive view of data within the Salesforce platform, allowing users to analyze and visualize information from various objects. Users can create custom reports to track performance, monitor key metrics, and make data-driven decisions, enhancing their overall efficiency and effectiveness in managing customer relationships. The default currency for Infovista is in euros, hence all reporting is in euros.

Creating a report in Salesforce involves several steps:

- 1. Log into Salesforce:** Open your web browser, navigate to the Salesforce login page, and enter your credentials to log in.
- 2. Access the Reports Tab:** Once logged in, go to the "App Launcher" (grid icon) and find the "Reports" tab. Click on it to access the Reports home.
- 3. Make sure that there is not an already existing report with the same characteristics.**
- 4. Create a New Report:**
 - Click on the "New Report" button.
 - Choose the object you want to report on (e.g., Accounts, Contacts, Opportunities) and select a report type based on your requirements.
- 5. Define Report Criteria:**
 - Drag and drop fields from the left pane to the preview pane to define the columns of your report.
 - Add filters to narrow down the data based on specific criteria.
- 6. Preview and Customize:**
 - Click "Run" to preview your report.

- Customize the report layout, format, and group data as needed.

7. Save the Report:

- Click "Save" to save your report.
- Choose a folder to store the report in and provide a unique name.
- Please try not to save your report under "Unfiled Public Reports" and try looking for the relevant folder.

8. Run and Share:

- Once saved, you can run the report at any time to get the latest data.
- Share the report with others by setting up report folders and access permissions.

SFDC Dashboards

Salesforce dashboards are essential tools for organizations, providing a visual and real-time snapshot of key performance indicators. These customizable displays distill complex data, enabling quick and informed decision-making. By offering a clear overview of trends and metrics, Salesforce dashboards empower teams to monitor progress, identify opportunities, and align strategies for success, making them indispensable for navigating the complexities of business operations with agility and precision.

Creating a dashboard in Salesforce involves several straightforward steps:

1. Log into Salesforce:

- Access your Salesforce account using your credentials.

2. Navigate to the Dashboard Builder:

- Once logged in, go to the App Launcher (grid icon) and search for "Dashboards." Click on "Dashboards" to enter the Dashboard Builder.

3. Make sure that there is not an already existing dashboard with the same characteristics

4. Click "New Dashboard":

- In the Dashboard Builder, select "New Dashboard" to start creating a new dashboard.

5. Choose Dashboard Layout:

- Salesforce offers various layouts. Select a layout that suits your data visualization needs.

6. Name Your Dashboard:

- Provide a meaningful name for your dashboard to easily identify its purpose.

7. Add Components (Charts, Tables, etc.) :

- Click on the "Components" tab and add the desired report components to your dashboard. You can include charts, tables, metrics, and other visual elements.

8. Configure Components:

- Customize each component by selecting the data source, defining filters, and adjusting display settings to meet your reporting requirements.

9. Arrange and Resize Components:

- Arrange the components on the dashboard canvas to create a logical flow. Resize and organize them to maximize visual appeal and effectiveness.

10. Save the Dashboard:

- Save your dashboard to retain the configurations and settings. You can choose to keep it private or share it with specific users or groups.

11. Preview and Refine:

- Preview your dashboard to ensure it meets your expectations. If needed, go back to the Dashboard Builder to refine, or add additional components.

12. Deploy and Share:

- Once satisfied, deploy your dashboard. Share it with relevant users or groups to ensure widespread access to the insights it provides.

Here are some examples of dashboards that were created:

- [**GN CFY Dashboards for ADs**](#) – This Dashboard was created with specifically for GN Account Directors and gives an overview of all most important measures. Key KPIs include the 12 months Rolling Pipeline by Quarter/Stage/Product Family, YTD Pipe Created and the YTD Bookings. We have also included a component on deals where close date is in the past, which is a reminder to keep your deals updated
- [**Hammer AD Dashboard**](#) – This Dashboard was created with specifically for GCC Account Directors and gives an overview of all most important measures
- [**GN 3FY Bookings Won Trend**](#) – Provides booking trends over the past 3 FYs. Key KPIs include Bookings per Product Family, IP Mix, Product Revenue Type.
- [**GN Software CFY Bookings Trend**](#) – Shows how much we've won so far this FY. Key KPIs include YTD SW Bookings per Product Family/ Quarter and YTD/CQ Bookings AD Leaderboard.
- [**GN CFY Software Pipe Creation Dashboard**](#) – Provides the amount of pipe that has been created in YTD FY. Key KPIs include Pipe Created per Month/Status and an AD Pipe Creation Leaderboard.
- [**GN Professional Services Dashboard**](#) – Shows how much we've won/lost so far this FY and the pipeline coming from professional services. Key KPIs include the 12 months Rolling Pipeline by Stage/Product Family/Product Category.
- [**CFY Sales Pipeline Dashboard**](#) – Provides the amount of our current pipeline and the total pipe that has been created in YTD FY. Key KPIs include the 12 months Rolling SW Pipeline overall and per region and the Pipe Created in the CFY.
- [**CFY Sales Won Dashboard**](#) – Shows how much we've won/lost so far this FY in GN overall (Maintenance, Services and Software Products).
- [**CFY Pipeline Stats**](#) – Provides a detailed information about our 12 months Rolling Pipeline Status.
- [**GN CFY Dashboards for ADs**](#) – This Dashboard was created with you in mind and gives you an overview of all your (or your team's) opportunities. Key KPIs include the 12 months Rolling Pipeline by Quarter/Stage/Product Family, YTD Pipe Created and the YTD Bookings. We have also included a component on deals where the close date is in the past, which is a reminder to keep your deals updated.

- [**Hammer Dashboard**](#) – This Dashboard gives you all KPIs for Hammer, including the 9mth Rolling Pipeline and YTD Bookings Closed.

VP Dashboards

The below dashboards provide you with relevant information on the current quarter revenue forecast as well as Pipeline/Bookings.

Bookings Forecast and Pipe Dashboard

Dashboards used by regional VPs for Closed Won bookings, Current Quarter and Next Quarter Forecast and remaining pipeline in the region.

- [**GN RoW Bookings Forecast and Pipeline**](#)
- [**GN Americas Bookings Forecast and Pipeline**](#)
- [**GN Europe Bookings Forecast and Pipeline**](#)

CQ Revenue Dashboard

Dashboards used by regional VPs for Secured Won revenues, Revenue Forecast, Revenue Forecast linearity, Forecast Margins etc.

- [**GN - RoW CQ Software Revenue Dashboard | Salesforce**](#)
- [**GN Americas CQ Software Revenue Dashboard | Salesforce**](#)
- [**GN Europe CQ Software Revenue Dashboard | Salesforce**](#)

Note: These dashboards are only accessible by VPs.

3.3 Pipeline

Pipeline represents all the open opportunities within the stated period (e.g.: month, quarter, year, or 4 Rolling Quarters). The continued nurturing of opportunities provides the path to our success. Therefore, building and qualifying pipeline must be a part of a Sales Director's fiscal responsibilities and duty. **As part of the Sales team, you must maintain the status of your opportunities in SFDC.** Industry standards for software business would indicate that for a high touch sales organization, it is common to have a coverage of 3x and above.

Pipeline is owned by Sales. A strong pipeline enables the salesperson to manage uncertainties in deal closure and still meet the committed forecast. For instance, if a deal does not close for whatever reason, a strong pipeline will enable the salesperson to backfill another deal in the pipeline.

Definitions

The sales pipeline is built upon a set of Stages that a sales opportunity moves through, which determines

the pipeline maturity; from the initial stage until it is closed (won or lost). The value of the pipeline is the sum of all open sales opportunities or based on specific criteria such as Revenue Type or Product Family etc.

Pipeline management allows you to track the evolution of the opportunities through the sales process.

Diligence and focus on pipeline management will help you understand your pipeline and what you need to do to reach your targets. As well as providing the transparency needed to the company, it will also allow you to involve the required resources to win.

The key dimensions to consider when managing your pipeline are:

- **Pipeline Volume** – Number of opportunities, € value
- **Pipeline Maturity** – Sales Stage and progression through the sales cycle
- **Opportunity Qualification** – Clear understanding of basic qualification of “BANT” (Budget, Authority, Need and Timeframe)
 - A Sales Qualified Lead (SQL) will be qualified with 3 out of the 4 qualification criteria of BANT for this to become part of the qualified pipeline. The fourth element would need to be confirmed by Account Director to become a Sales Accepted Lead (SAL).

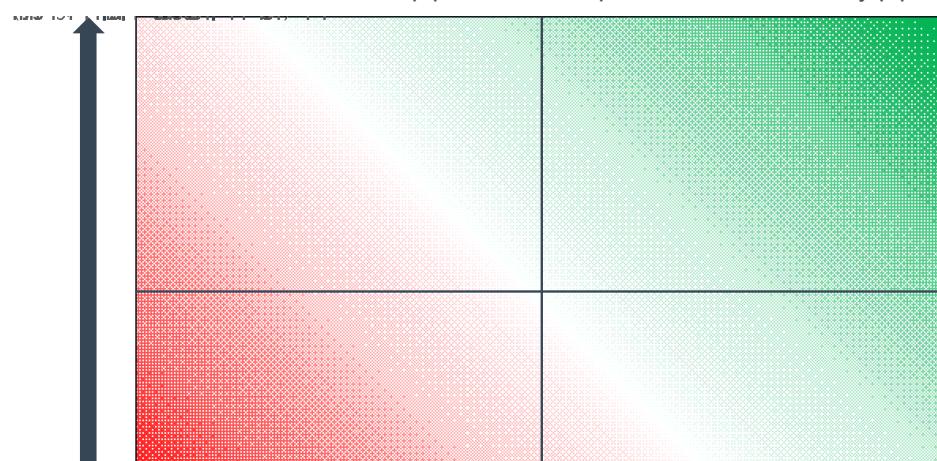
Note: If the BANT has not been identified yet, then the stage must be “Discovery”.

- **Pipeline:** The total value (unweighted value) of qualified opportunities for a stated period, i.e. closing in the future.
- **Weighted Pipeline:** The sum of the weighted value of total qualified opportunities in pipeline. This is achieved by multiplying the value of the opportunity by its probability
- **Forecast ToGo:** Forecast - Total Closed Won value
- **Quota ToGo:** Quota - Total Closed Won value
- **Pipeline coverage:** Pipeline / ToGo. Example: a pipeline coverage of 2 means that the sum of unweighted opportunities in the pipeline represents twice the value of ToGo
- **Weighted pipeline coverage:** Weighted pipeline / ToGo

In the software industry, a pipeline coverage of >3x is the accepted benchmark to ensure you have sufficient pipe to achieve your numbers. Weighted pipeline coverage, combined with the pipeline coverage, is a good KPI for you to understand the maturity of your pipeline. The market benchmark is to have a weighted pipeline coverage of > 1x.

Pipeline Maturity

The table below shows the overall view of a pipeline and steps to achieve a healthy pipeline.



Pipeline Stages

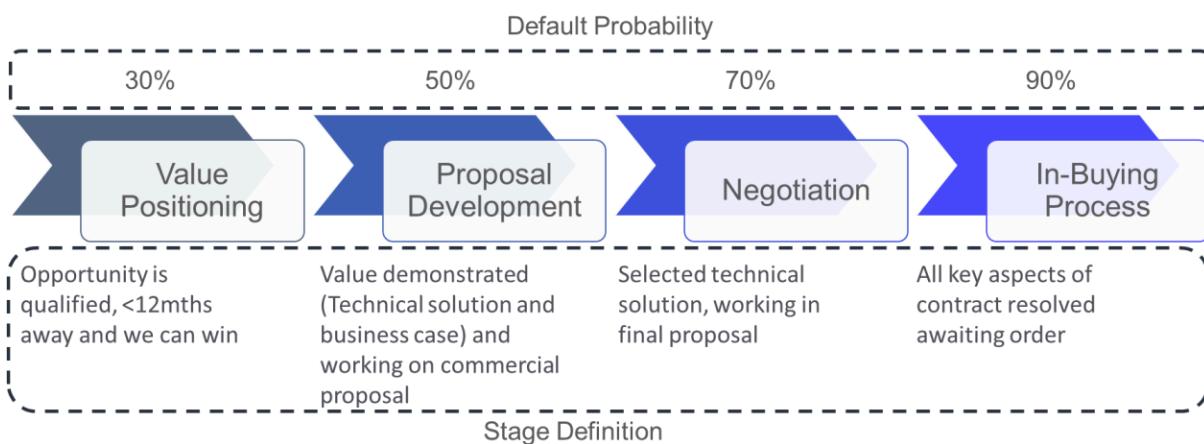
Sales Pipeline is the foundation of any sales territory. The 4 stages we measure indicate the maturity of the pipeline for Region, Territory, or Sales Director. It is important that every interaction with your opportunities are updated in SFDC daily or as required when new information becomes available through contact and interaction. SFDC is the single source of the truth, and we all need to apply diligence and good sales hygiene to SFDC and our opportunities.

Pipeline Value and Opportunity Value are key criteria to be accurately updated in SFDC. There are two key reasons:

- Accurate estimation of the value of all opportunities provides clarity on the pipeline coverage and displays control of your business as an Account Director. The opportunity value must reflect the best estimate of a realistic value for which a deal can be closed (i.e. based on customer size, network complexity, known average deal size, etc.)
- The value and sales stage of any opportunity will drive the decision where we should invest resources to support and prioritize opportunities

Sales Stages are key to build your forecast and the probability of success in any given period e.g. if all your pipeline is currently in “Value Positioning”, your forecast could be at risk as there might not be sufficient time to closure; if it was in “Negotiation” then based on the right activity and balance of probability the forecast would be stronger.

Infovista has four qualified opportunity stages:



Opportunities in each of these Stages have a fixed probability (%) reflecting the progress on the sales cycle which is also an indicator of your pipeline maturity. The values are set as a default in SFDC and cannot be changed.

For each of the opportunity's stages, Infovista recommends the following guidelines/checklist before moving to the next stages:

Stage	Definition	Recommended actions / Checklist
Discovery	Sales team uncovering customer needs, grasp challenges, and explore solutions.	<ul style="list-style-type: none"> ● Identify Project (What) ● Identify compelling event (Why) ● Understand Org Structure and buying influences (Who) ● Introduce and properly position IV (Why us) ● Budget, Authority, Need, Timing Identified
Value Position	Use case identified and has the right product fit.	<ul style="list-style-type: none"> ● Ideal Customer Profile ● Product fit ● Compelling event, Budget, and Deal Closure Plan in SFDC ● Project holder/decision makers identified & met ● Sales presentation / demo given ● No major technical showstoppers ● Uploaded relevant documents on SFDC
Proposal Development	Value Demonstrated (Technical Solution and Business Case) and working on formal proposal	<ul style="list-style-type: none"> ● Budget confirmed & competition identified ● Virtual Opportunity Team defined ● AHA requests identified and reviewed ● BoQ & Solution Description Document ● Sizing by Pre-Sales ● Identify PoC needs ● PS creates LoE, SoW, PiP and fill in "Deployment Complexity" fields in SFDC ● MX (Attach rates, SLAs, ACV, Indexation, Start Date) ● Sales plan documented ● Executive bridging ● Sales presentation / demo given
Negotiation	Selected technical solution, working on final proposal	<ul style="list-style-type: none"> ● Payment terms & invoicing milestones ● LoE, SoW, PiP, Sizing and AHA approval ● Internal costs reviewed & approved by PM & Finance ● Contracts drafted & exchanged. Signed versions uploaded to Leeway platform ● Executive bridging ● Upload all documents ● Update CPQ and push for approval
In-Buying Process	All key aspects of opportunity resolved – awaiting order	<ul style="list-style-type: none"> ● CPQ approved (Primary quote) and submitted to customer ● Upload all relevant documents to SFDC
Closed Won	Order is received and being processed by Finance	<ul style="list-style-type: none"> ● PO received & sent to orders@infovista.com

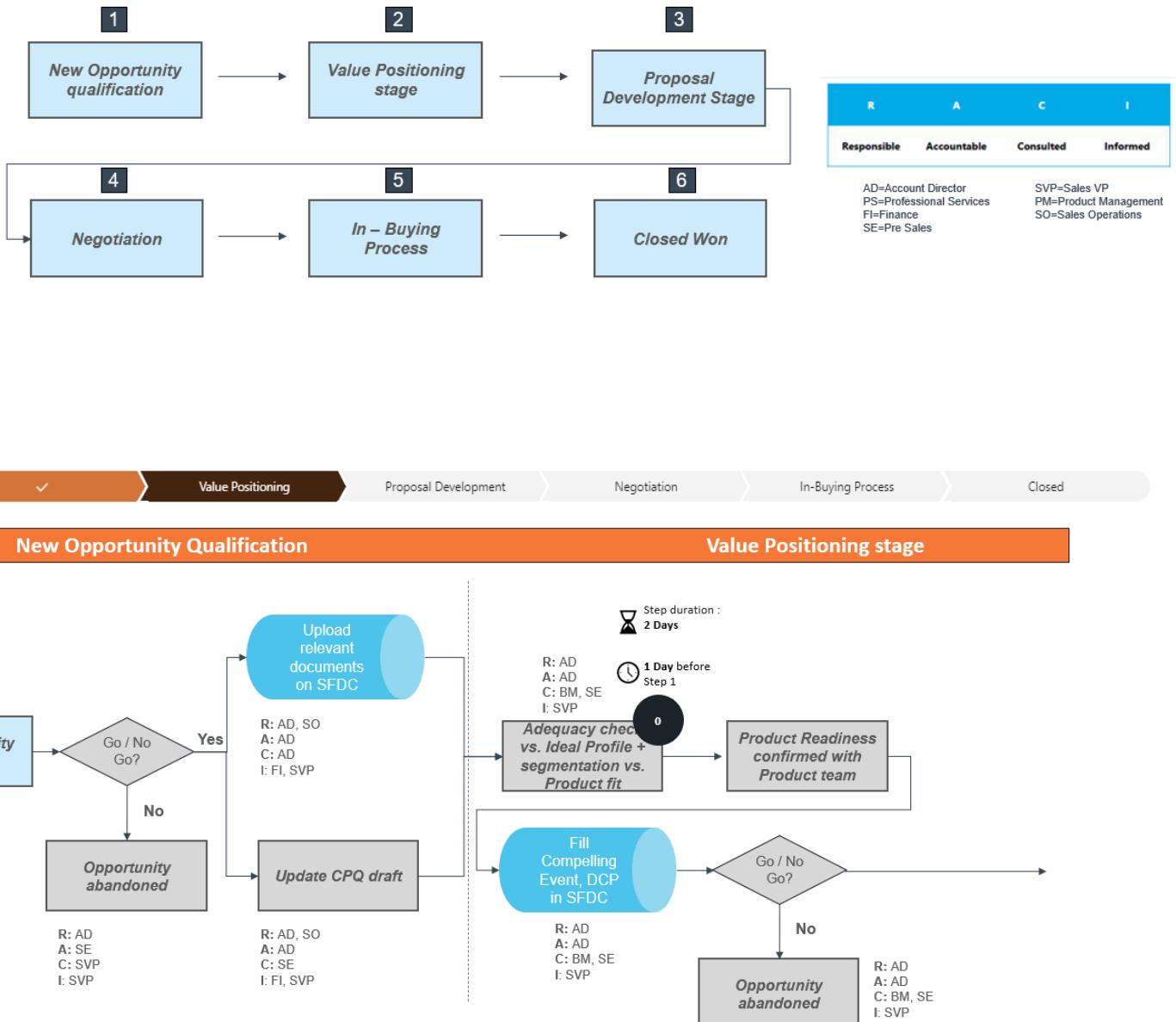
Note: Due to the nature of NT/RE run-rates deals (Deals opened and closed in the same quarter), they do not necessarily have to pass through all the pipeline stages.

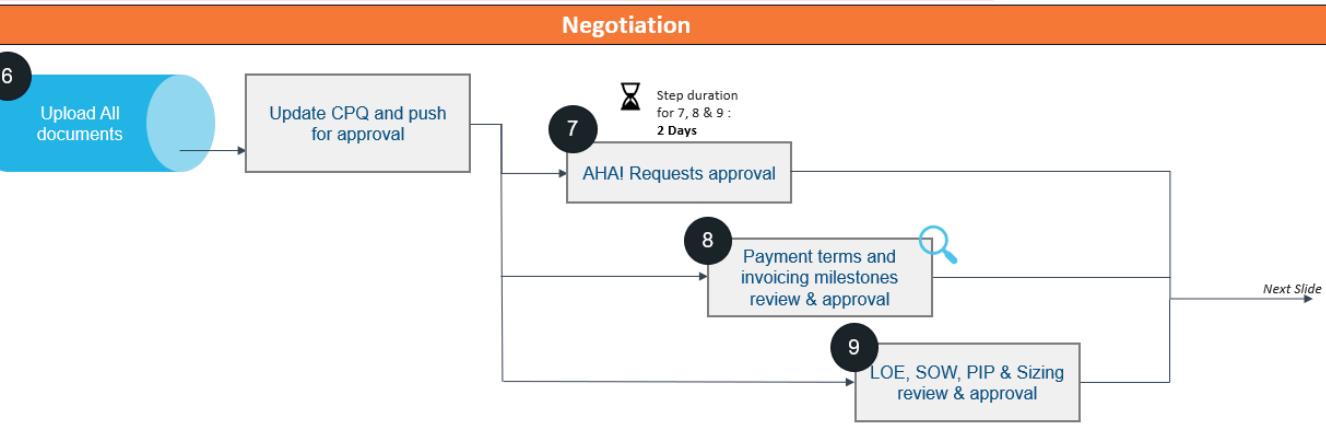
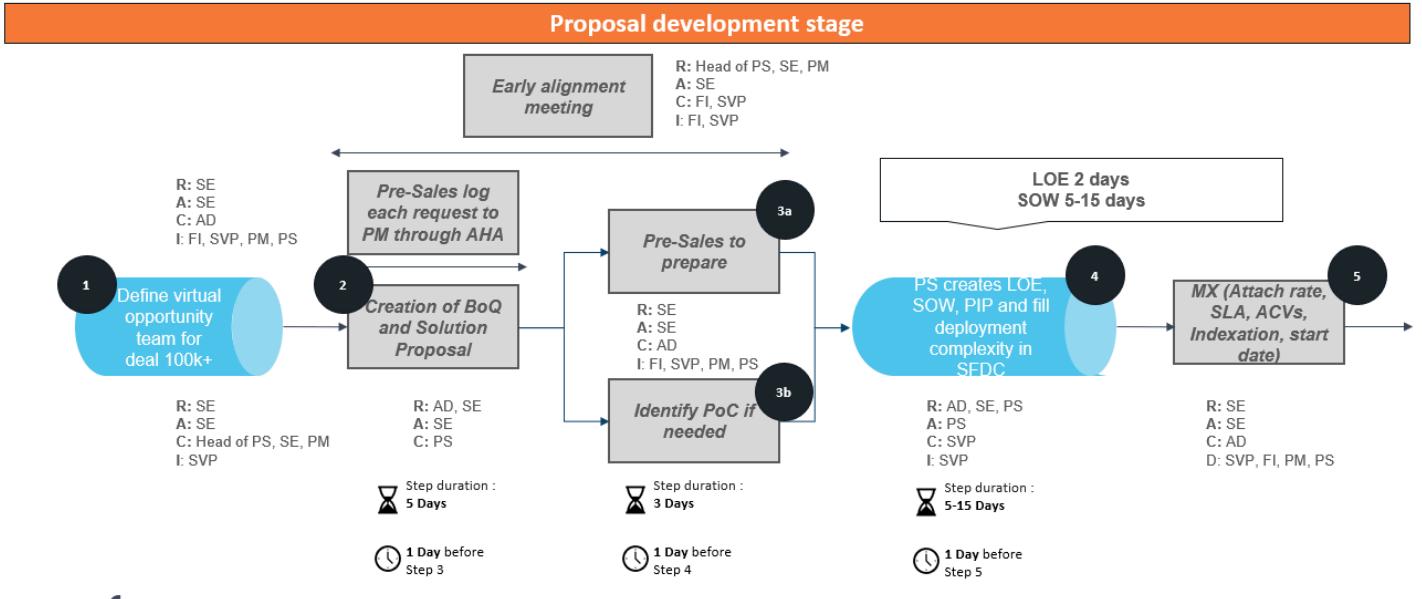
For each of the stages, there is an associated / recommended forecast category and CPQ. Please make sure to always check the forecast category whenever moving the opportunity stage status:

Stage	Forecast Category	CPQ Status
Discovery	Omitted	Not Applicable
Value Position	Development	Draft
Proposal Development	Development / Upside	Draft
Negotiation	Upside / Commit	In Review
In-Buying Process	Commit	In Review / Approved
Closed-Won	Won	Approved

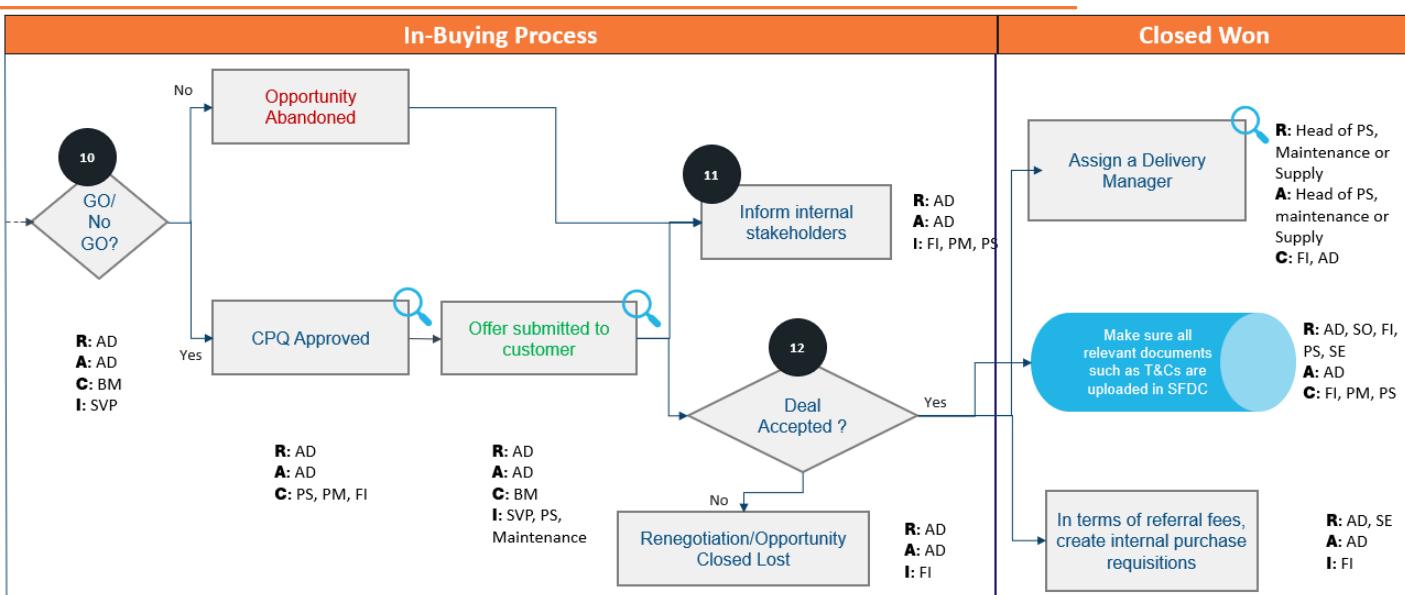
3.4 Detailed Sales Process

Default Sales Process





✓ } ✓ } ✓ } ✓ In-Buying Process Closed



Critical Deal Review

In the realm of sales, the Critical Deal Review (CDR) is our playbook's compass for navigating high-stakes negotiations. It goes beyond routine inspections, offering a deliberate approach to dissecting key elements of significant deals (applicable to all deals bigger than €250k and to total or standalone PS deals bigger than €100k). The CDR equips our teams with insights and methodologies to make informed decisions, turning challenges into triumphs.

	Commercial Review	Critical Deal Review
Process	<ul style="list-style-type: none"> ● Backlog forecasting ● Current Quarter ● Applicable to: ● All "Commit" & "Best Case" deals ● Next Quarter <p>Applicable to:</p> <ul style="list-style-type: none"> ● All >€150k SW "Commit" & "Best Case" deals with 50% or above probability 	<ul style="list-style-type: none"> ● Align backlog items with revenue forecast ● CDR review for potential deal deflection or risk reduction ● Optimize resources ● Implement corrective actions based on CDR findings
Output	<ul style="list-style-type: none"> ● Checklist items from backlog and revenue scheduling ● SFDC revenue schedule update and communication 	<ul style="list-style-type: none"> ● CDR deck per opportunity ● SFDC revenue schedule update and communication ● CDR summary for WOR
Timeline	<ul style="list-style-type: none"> ● First 10 days of quarter / Bi-Weekly 	<ul style="list-style-type: none"> ● Bi-Weekly / Ad-Hoc

Critical Deal Review – Framework

	Commercial Validation	Template Finalization	Critical Deal Review	Outcome & Follow Up
 Process	<ul style="list-style-type: none"> - Identify deals meeting CDR criteria and pre-populate template with commercial and other readily available data from SFDC - Lead SE identified 	<ul style="list-style-type: none"> - Finalize the template with all required inputs in alignment with all stakeholders (Sales, Product, PS, MX, Legal etc.) - Filled template send out in advance of the meeting to the team for review 	<p>Participants</p> <ul style="list-style-type: none"> - CRO - Sales VP - Account Director - SVP SE - Lead SE - PM representative - PS representative - MX representative - Sales Ops 	<ul style="list-style-type: none"> - Highlight the challenges, non-standard product or payment items, complex project deployments. - Put forward special approval requests if any. - Seek leadership sponsorship where needed. - Go/No-Go decisions where applicable. - Follow up calls (internal) to resolve open points.
 Timeline	Continuous process (Templates to be ready 1 day prior to CDR)		Bi-Weekly / Ad-Hoc	
 Facilitator	Sales Ops		Sales Ops / SVP SE	

Critical Deal Review – Deck template

CDR - Summary

To be filled in by Sales Ops

Deal Summary

Risks Look

Customer Profile

Solution (BoQ), Sizing and Services Overview

BoQ

Deal Win Strategy, Pricing Strategy and Competition landscape

Deal Closure Plan

Key Financials (1/2)

Key Financials (2/2)

Asks

Action Tracker

CDR - Deck Template

3.5 Forecast and Business Management

Definitions

Forecast is the Sales Director identified opportunities and estimated value that are committed to close within the stated period.

IV IP vs. 3rd Party: The selection of "Product Category" identifies whether the software products is IV IP or 3rd Party.

IV IP includes the below product categories as defined in SFDC:

- License
- SaaS
- Cloud
- Custom Dev*

3rd Party is everything else: appliances, geodata

*For Commission credits perspective, Custom Dev will not be treated as IV IP. Please refer to GN Commission T&C for more details.

Secured Won: Bookship Closed/Won + Backlog

SFDC Revenue Forecast: Secured won + Bookship-to-go (Commit)

Most Likely Case: SFDC Revenue Forecast + Deals marked as VP Call in SFDC

Best Case: SFDC Revenue Forecast + Ticked "BC (Best case)" deals

Worst Case: SFDC Revenue Forecast + Ticked "WC (Worst Case)" deals that are considered risky

- 1) Utilize Best-Case, Worst-Case fields to quickly select Deals to be put in your buckets
 - a) Select BC for any opportunities that are not ready to be committed but that there is a clear pathway to closure
 - i) These Deals cannot be in Commit already

Forecast Categories

You build your forecast with a selection of open opportunities you have in your pipeline. You qualify the opportunities and use the "Forecast Categories" to identify the opportunities as part of your forecast.

Infovista has 5 Forecast Categories:

Forecast Stage	Definition	SFDC Stage	CPQ Stage
Omitted	<ul style="list-style-type: none"> ● Deal will not happen this quarter ● For unqualified and discarded opportunities only 	Discovery	NA
Development	<ul style="list-style-type: none"> ● Potential deals that are still in the early stages of 	Value Positioning / Proposal Development	Draft

	<ul style="list-style-type: none"> development These opportunities have not yet progressed to a point where they can be reliably forecasted and may require production or has roadmap dependency that may not be completed in current quarter These deals should not be forecasted in current quarter 		
Upside	<ul style="list-style-type: none"> Opportunities that have a higher likelihood of closing compared to those in the Development Category Not yet considered fully committed or certain. Upside deals often involve negotiations or discussions that suggest a positive direction but may still require further validation including certainty on closure timeline Upsides with the higher likelihood of closure should be tagged as "Best Case" in SFDC 	Proposal Development / Negotiation	Draft / In-Review
Commit	<ul style="list-style-type: none"> Represents opportunities that the sales team is confident will close successfully within the forecast period These deals have undergone thorough assessment, and there is a high level of confidence in their closure Commit opportunities with uncontrollable risks should be tagged as "Worst Case" in SFDC 	Negotiation / In-Buying Process	In-Review / Approved
Closed Won	<ul style="list-style-type: none"> Order is received and being processed by Finance 	Closed Won	Approved

The table below shows further details on how to distinguish between Commit and Upside deals:

Criteria	Commit	Upside
Compelling Event	✓	✓
Customer Timeline Confirmation	Confirmed	Possible Pull In without compromising much on margins
Budget Allocation	Confirmed	WIP
Competition Mapped	✓	✓
Product Readiness / Roadmap Commitment	✓	✓
All relevant decision makers mapped & contacted	✓	✓
Deal Closure Plan	Updated in SFDC	Updated in SFDC
CPQ Submission	Submitted for Approval	Draft
Signature & PO Process	✓	✓
Probability / Stage	>=70%	>=50%
Dependency on ongoing projects	Completion within 2 weeks of quarter close	Completion within 1 week of quarter close
Dependency on customer winning a project (E.g., NT)	Not Commit	Yes, if there is a clear timeline from customer and ample time for PO process within quarter

Incoterms:

Please find below the rules which define the responsibilities of sellers and buyers.

	EXW	FCA	FAS	FOB	CFR	CIF	CPT	CIP	DAP	DPU	DDP
	Ex-Works	Free Carrier	Free Alongside Ship	Free On Board	Cost and Freight	Cost, Insurance, Freight	Carriage Paid To	Carriage and Insurance Paid	Delivered At Place	Delivered at Place Unloaded	Delivered Duty Paid
Risk transfers when:	Goods placed at buyer's disposal	Goods placed at buyer's disposal	Goods arrive alongside ship	Goods loaded on ship	Goods loaded on ship	Goods loaded on ship	Goods taken in charge by carrier	Goods taken in charge by carrier	Goods arrive at named destination	Goods unloaded at named destination	Goods arrive at named destination
Loading and inland transport	Buyer	Seller	Seller	Seller	Seller	Seller	Seller	Seller	Seller	Seller	Seller
Export taxes, clearance	Buyer	Seller	Seller	Seller	Seller	Seller	Seller	Seller	Seller	Seller	Seller
Unloading of the vehicle in the export port	Buyer	Buyer	Seller	Seller	Seller	Seller	Seller	Seller	Seller	Seller	Seller
Loading fees in export port	Buyer	Buyer	Buyer	Seller	Seller	Seller	Seller	Seller	Seller	Seller	Seller
Main carriage	Buyer	Buyer	Buyer	Buyer	Seller	Seller	Seller	Seller	Seller	Seller	Seller
Unloading fees in import port	Buyer	Buyer	Buyer	Buyer	Buyer	Buyer	Negotiable	Seller	Seller	Seller	Seller
Loading to the transport vehicle in import port	Buyer	Buyer	Buyer	Buyer	Buyer	Buyer	Buyer	Seller	Seller	Seller	Seller
Transport to the delivery address	Buyer	Buyer	Buyer	Buyer	Buyer	Buyer	Buyer	Buyer	Seller	Seller	Seller
Import formalities, duties, fees	Buyer	Buyer	Buyer	Buyer	Buyer	Buyer	Buyer	Buyer	Buyer	Buyer	Seller
Unloading at named destination	Buyer	Buyer	Buyer	Buyer	Buyer	Buyer	Buyer	Buyer	Seller	Seller	Buyer
Insurance	Negotiable	Negotiable	Negotiable	Negotiable	Negotiable	Seller Clauses (C)	Negotiable	Seller Clauses (A)	Negotiable	Negotiable	Negotiable

Professional Services Forecast specificities:

Sales Forecast is owned by the sales team. The Professional Services team doesn't have specific actions or updates in this process.

They do provide LOE's to support quotes, which establish the value and margin of the services component of the opportunity. The Professional Services team only takes the forecast to estimate if any of those opportunities can be converted into revenue (i.e. delivered) in the current quarter as part of the Revenue Forecast.

Maintenance Forecast specificities:

Forecast categories are similar for Renewals opportunities and starts at "Development". In some cases, when no risks or red flags have been identified, opportunities at SFDC stage "Proposal Development" can be flagged with the Forecast Stage "Omitted".

Omitted/ Merge/ Coterm/ Currency: This SFDC stage is used to highlight that the contract of this opportunity is also included in the master renewal opportunity. This is a workaround to a SFDC limitation as we can't merge opportunities and for compliance, we are allowed to delete opportunities. This stage is a pure operational stage. Below are the reasons:

- Merge/ Coterm: Refers to [Co-termination](#) of contracts.
- Currency: This SFDC stage is used when for the same client we have different opportunities with different currencies. We want to merge those into one single renewal opportunity with one currency.

3.6 Best Practices

There are a few best practices we recommend following for the CQ deals and Opportunity / Account Management.

CQ Deals:

- **1st month:** All CQ deals must be at least in Proposal Development stage and Upside Forecast
- **2nd month:** All CQ deals must be at least in Negotiation stage and Upside Forecast
- **3rd month:** All CQ deals must be at least in-buying process stage and commit Forecast
- All deals must have CPQ quotes with primary quote linked to most probable value
- No Commit deals without Approved CPQ quote
- All Commit deals should have value selling section completed
- No close dates at the end of the quarter
- No close dates in the past
- For Pull in deals from future quarters, VP must pull the deals into the CQ
- Worst Case deals must be in commit
- All deals MUST have POs and/or all necessary BM documentations required before closure
- VPs to work closely with Finance and Supply to maximize revenues for the quarter

Opportunity/Account management:

- Do not create duplicated accounts
- Do not create multiple opportunities for a deal
- Use CPQ within the same opportunity to create multiple options. Ensure that the most accurate one is marked as “Primary Quote”
- If there is no likelihood of the opportunity to close, only then close lost the opportunity
- Unqualified Deals: Review all deals; any possibility of upgrading them? All older deals, move up or out
- Please do not close out and recreate a new opportunity for the same deal
- Ensure that all records are updated regularly and accurately reflect the current situation
- Ensure dates are accurate and realistic. Keep close eye on it too and do not allow it to be in the past. Opportunities with past close dates do not get pulled into reports
- Is the stage/products/etc. correct?
- Is the Overlay Owner accurately reflected (only Sales ADs and VPs names allowed)?
- Is the Account/Reseller field correct (Account is always the End-User, Reseller the Partner who sells directly to End-user)?
- Has the DCP or Chatter been updated recently?
- Is there any accurate and sent to approval CPQ?

- Do not Delete Opportunities! Use Closed Lost where applicable
- For deals without an SFDC opportunity yet, VP must ensure that ADs create the opportunity.
- For deals to be closed (not won), ensure if the following fields are correctly selected:
 - Stage = Closed/Lost
 - Win/Lost Category:
 - Lost to Competitor: The deal was won by a competitor (ensure that you select the correct Competitor name in the “Winning Competitor” field)
 - Disqualified: The deal was not secured by us nor a competitor
 - Win/Lost Reason:
 - Please select the most accurate description of why we lost the deal. Important definition of “Duplicated Opportunity” reason
 - Please note that the “Duplicated Opportunity” reason for a Closed Lost opportunity refers to having 2 opportunities that are alike and are open AT THE SAME TIME.
- “Closed/won”
 - Congratulations on your won deal! But before marking the opportunity closed/won, please ensure that all the proper documentation has been uploaded and received.

Business & Revenue management:

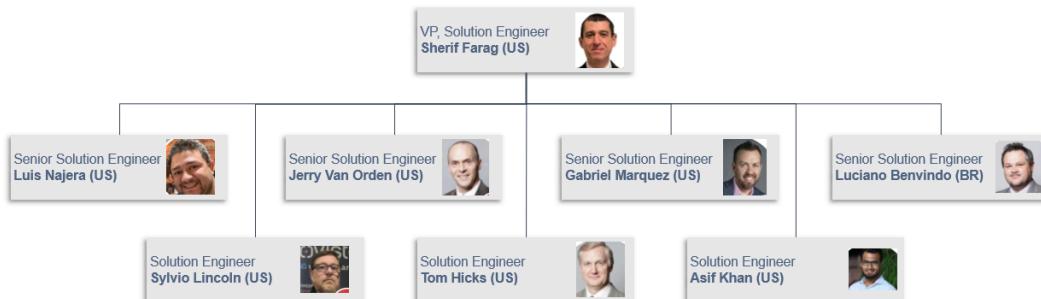
- **Firm Purchase Order** received by customer/partner on or prior to month/quarter/year cut-off date. No Exceptions!
 - **Clear and defined** BOM, pricing, and delivery timeline shall be on or prior to cut-off
- **Payment Terms** – Infovista standard payment terms is 30 days. Special terms (e.g., Net 45, Net 60, or greater) may be offered based on customer negotiations or strategic importance, subject to prior approval by the Credit Manager. Early payment discounts of up to 2% for payments may be offered selectively to encourage timely payments [**Credit Management policy**].
- **Back-to-Back Payment Terms** must not be accepted.
- **Delivery types and INCOTERMS:**
 - Software: Electronic delivery
 - Hardware: EXW or CIP, preferred [**Incoterms**]
- **Sell Maintenance!** – Our value is not only in our software products, but also in our maintenance and support services. The value created from maintenance sales will help Infovista to continue to invest in our product development.
- **Acceptance criteria – NO.** If acceptance tied to software/hardware delivery, then revenues will be delayed.

- **Refund or Cancellation rights – NO.** If has the right to refund or cancellation, then revenues will be delayed.
- **Linearity** – Having smooth linearity of deals will help maximize revenues and margins as it avoids mistakes, unnecessary costs, and risk of missed booking deadline.
- **Start Date** - Term licenses to start in the current quarter if possible (if it is in line with customer's agreement and within contract terms) to maximize revenue.
- **IFRS 15** – Follow guidelines provided in the [Revenues IFRS 15](#).
- **Partial Invoicing** – To request for customer's agreement to accept partial invoicing, if possible, for orders with long completion time of Consulting/Custom Dev/Geodata and HW with long sourcing lead time.
- **Approved CPQ quote** – approved by all relevant levels of management *prior* to any commercial offers being extended to customer – **Do not add changes on CPQ quotes after approvals** – we should add a chapter/list with type of approvals needed + approvers name/function.

4 Pre-Sales

4.1 Organizational Structure and introduction

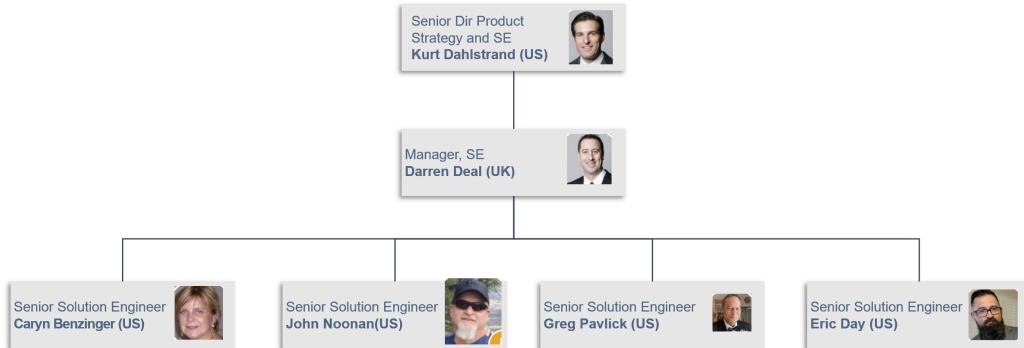
Americas Presales Sales Team



Europe & RoW Presales team



GCC Pre-Sales Team



Every opportunity requires a higher level of detail in assessing Customers' needs and expectations, from which the Solution Design, Architecture and Sizing, as well as Delivery set-up also need to be more detailed and accurate. Historically, we identified discrepancies between customer expectations and their perceptions of the service delivered.

To ensure Infovista keeps establishing high standards in Business practices and delivering on promises, it's critical to identify key stakeholders and Subject Matter Experts (SMEs) and engage with Sales community and customers directly, as to ensure Customers' needs and expectations are full and correct. This helps eliminate any assumptions and provides a full picture of customer needs.

In this context, **Account Directors (ADs)** are requested to include SMEs from Pre-Sales, Product Management, Professional Services and Customer Support for each opportunity, as part of the Opportunity Team within SFDC. Going forward every new opportunity should have this information included. In case it is not clear who should be Subject Matter Experts for an opportunity, please contact Sales_ops@infovista.com.

4.2 Solution Description Document

There are 5 key processes, namely Pre-Sales, Planning, Execution, Monitoring & Controlling and Closing that are important for the successful delivery of an opportunity. In this section the focus is on the starting Pre-Sales process. The key deliverable from this Pre-Sales phase is a **Solution Proposal**, which provides key features, functionalities, and benefits of the solution. The aim is to provide a comprehensive understanding of the solution for stakeholders, decision-makers, and end-users.

Below are links to Solution Description Document samples:

- [Nokia Pocket RFP Solution Description v2.docx](#)
- [Zain Technical ProposalV1906.docx](#)

The following checklist can be handy while preparing the Solution Description Document:

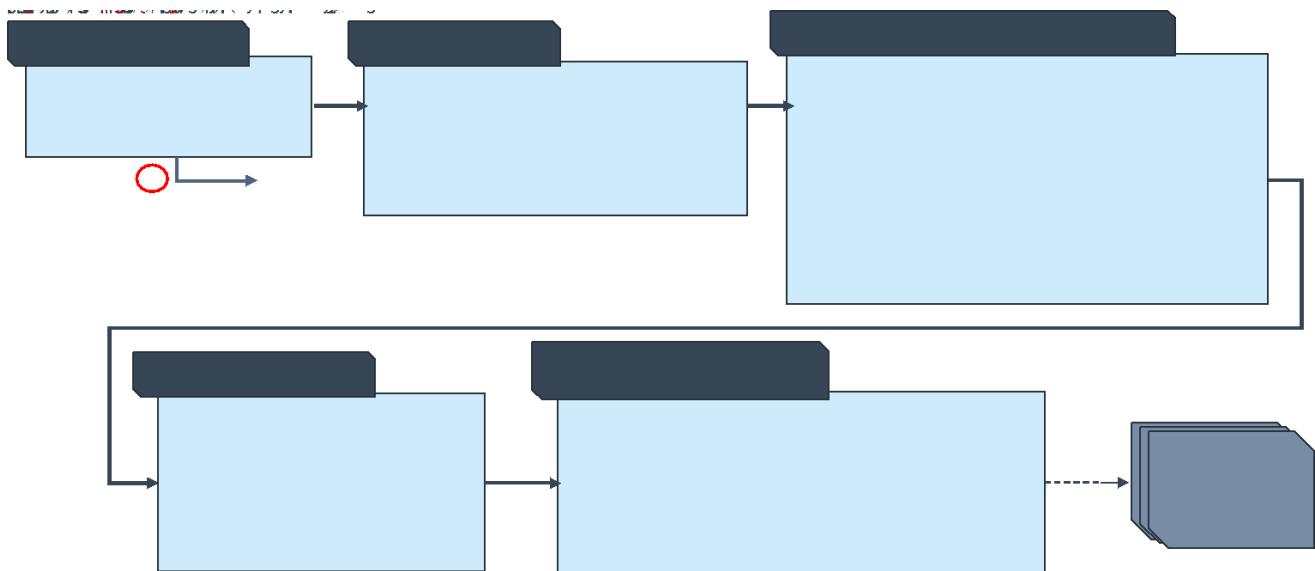
Category	Check List	Type
Customer Requirements	What are the business requirements?	General
	What are the deliverables?	General
Hardware Sizing	Have you used customer network data for HW sizing?	AA
	Has HW sizing been validated by product management?	AA
Technology	Are there any protocols to be supported?	AA
	Are there any technologies to be supported?	AA
	What network traffic are we monitoring?	AA
Software	Have you identified software license?	General
	Is product feature gap analysis complete? Aha!s created?	General
	Are there any features to be delivered? If so, roadmap or custom dev?	General
	Are there any security issues to be addressed?	General
	Are there any open issues to be addressed?	General
	Has the proposed software upgrade path in the solution proposal been validated by Product Management	General
	Has the solution proposal been reviewed by Product Management	General
	How long do we need to keep the data for? (Data Retention)	General
	Is hardware compatibility check complete?	AA
	Is OS compatibility check complete?	AA
	Is software compatibility check complete?	AA
	Do we have minimum/recommended RAM requirements in the solution proposal?	AA
	Who will supply the HW/OS with the OS license?	AA
	Have you identified test scripts	NT
	Have you identified drive test scenario?	NT
	What UEs are used for drive test and do they meet all band requirements?	NT
	Have you identified report KPIs	NT
	UE control functions required? (PCI, Band, RAT, etc.)	NT
	Have you identified post processing reports	NT
	Have you identified customer specific configuration	RE
	Have you identified any data migration/Conversion?	RE
Customer Environment	What type of environment do we use? Cloud or BareMetal or AWS or Azure or Tanzu or mixed	AA
Third Party Integration	Do we need to integrate our product with third party software/application/reference data/Alarms?	General
Customer	Has the solution proposal been reviewed by customer?	General
Timeline/Schedule	Has a timeline been committed?	General
Training	Have you identified any training requirements?	General
	What types of training? (Ex: Admin, User etc)	General
	How many days of training?	General
	Onsite or remote training?	General

4.3 RFP Bid Process

Bidding on a Request for Proposal (RFP) requires careful consideration and a strategic approach. The goal is not just to meet the requirements but to differentiate your proposal and demonstrate why your solution is the best fit for the client's needs. The Solution

Engineering Team plays a key role in taking this forward.

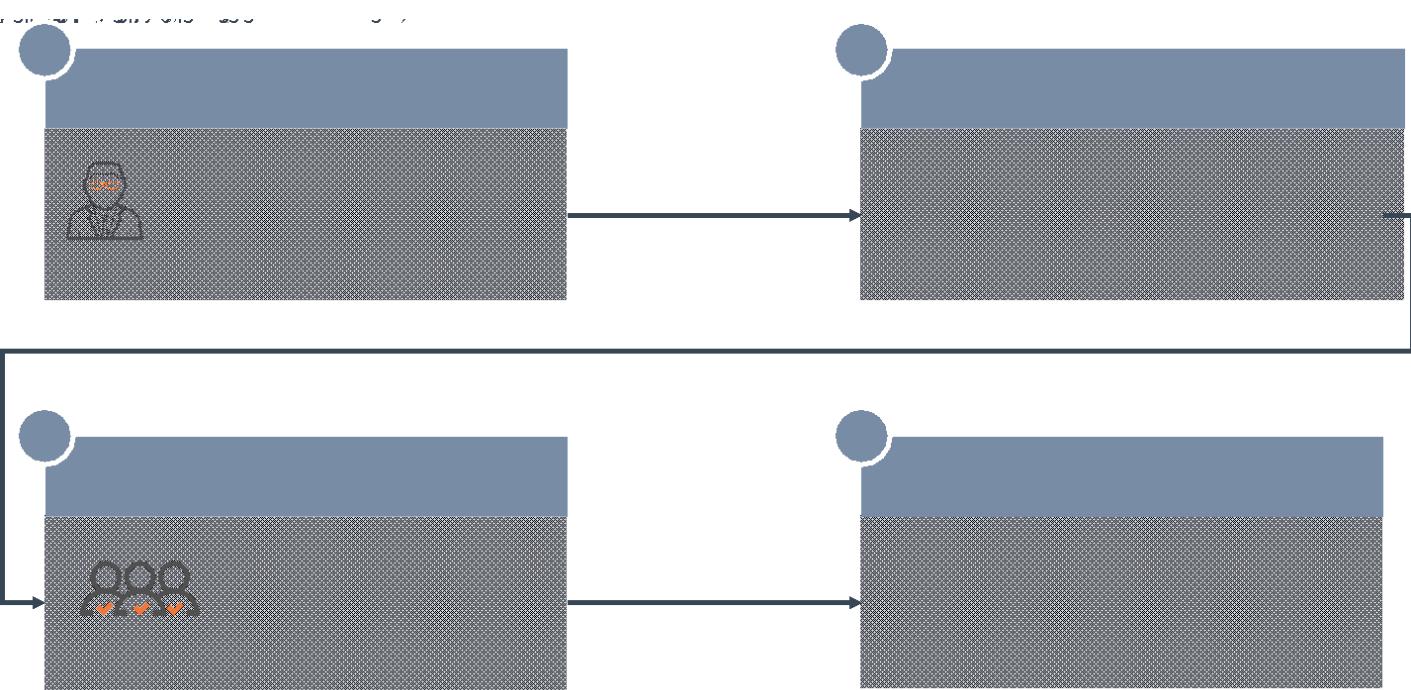
Below is a high-level flow of the RFP Bidding Process, that shows the engagement between various Teams (primarily Solution Engineering, Account Director, and Professional Services) in executing this process.



4.4 POC process

A Proof of Concept (POC) allows potential customers to see the software in action, helping to build trust and confidence in the product's capabilities. It provides tangible evidence that the software can meet the customer's specific needs.

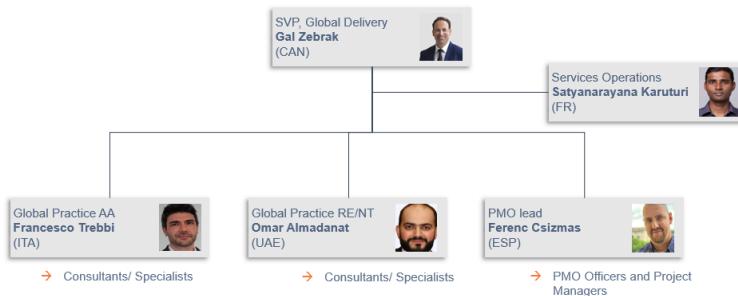
The following chart demonstrates the 4 phases a POC request goes through, and its ownership. It begins from the ownership of Account Director followed by the Solution Engineer until its completion.



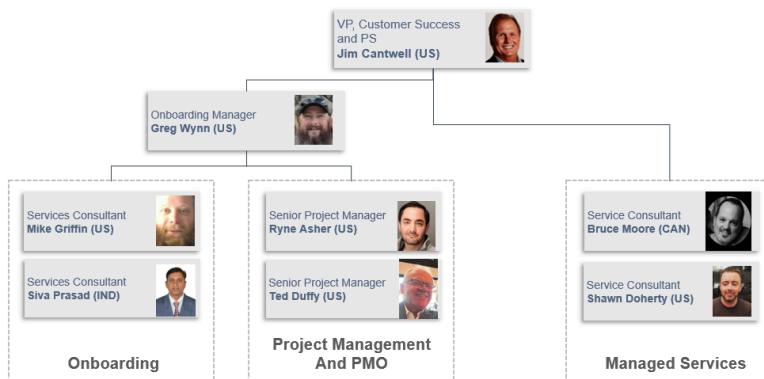
5 Professional Services

5.1 Organizational Structure and introduction

Professional Services Team



GCC Professional Services Team



The Professional Services (PS) Mission is to deliver high-quality services to clients while maintaining efficiency, profit, and customer satisfaction. The PS team is your business partner to ensure customers obtain maximum value and utilization of the Infovista solutions.

The PS organization is structured as follows:

Practice Leads (RE/NT/AA) are the primary contact for sales opportunity related questions, to align resources and support the proposal efforts during the pre-sale and opportunity development stage. The services team is structured with domain leads that align with our 2 main product areas a) Assurance and v) Network Testing and Radio Engineering. The Domain teams contain the solution consultants that deliver the service activities.

The PMO Lead manages the Project Management and PMO teams and has overall responsibility for the project delivery.

It is important to engage the PSO team, you will be assigned a Subject Matter Expert (SME) to support the sales opportunity from a service perspective, to ensure that services are budgeted

and scoped into the project from the outset of the work.

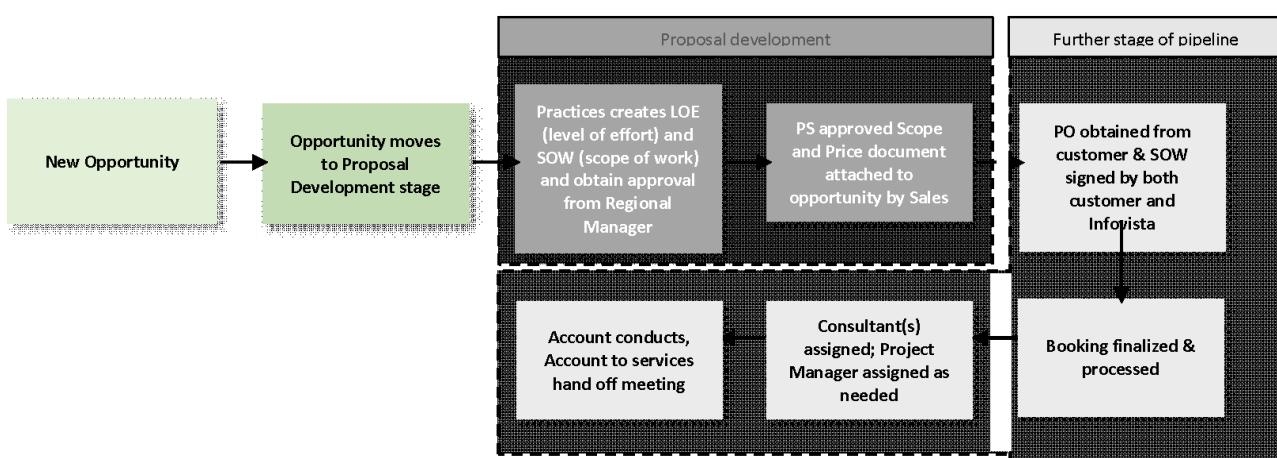
Services are an important part of overall deals and the ultimate success of the customer journey with Infovista. This section outlines the steps and processes to engage and involve the service team in the sales process.

Short summary of the roles:

- **SVP of PSO:** Overall responsibility for the Professional Services Division
- **Practice Leads:** Responsible for estimations and technical aspects of delivery, being the main PoC for Pre-Sales inquiries and technical delivery-related questions
- **PMO Lead:** Responsible for governance, project and process management
- **Services Operations:** Responsible for tracking and forecasting PSO revenue

5.2 Professional Services Offering

The sales processes comprising Professional Services offering is outlined below:



(*PSO does not have regional managers – this task is performed by the Practice Leads now)

It is best practice to position Professional Services with all software opportunities. Infovista professional services focus primarily on customer enablement with a mission to ensure our customers extract maximum value from the solutions we provide. Educated, knowledgeable and customers that have solutions that have been implemented to meet their business objectives and continue to engage with our experts throughout the lifecycle of the solutions usage consistently have the highest level of satisfaction and return business. It is important to work to engage and set an expectation that Infovista services can not only reduce time to value at the start of a customer journey but also play a critical role throughout, via upgrades, customization, on-going education, and potentially managed services.

Infovista Professional Service range from Software Implementation, Training, Software Configuration, Expert Mentoring, Tailoring of the Solution (e.g., custom reports, adapters, scripts) and Managed or Hosted Services. Early engagement with your professional services partners and pre-sales can help to identify service opportunities.

How a new project is created:

A project page is created in the PSA tool by the PS PMO Team, when a project starts; PMO is notified by the Practice Lead or by the corresponding project manager in the Pre-Sales phase. Then PMO creates the project, sets it to "pre-sales" stage and assigns the PM to it. Afterwards, PM will maintain the PSA project page (including the tracking of efforts done in the pre-sales phase and all upcoming relevant details). If the opportunity is lost, the project page is closed after the pre-sales phased. If the opportunity is won, after the Order Management Team creates the CE (Customer Engagement) entry in Salesforce, PS PMO Team receives an automated notification and updates the existing project with the related CE.

PSO Offering



Level of Effort from Professional Services

The Level of Effort (LoE) is a document that the Professional Services team will develop for sales to support quotation creation and substantiate the services value in your opportunity. The LoE is based on requirements developed in the Solution Proposal.

For Fixed Price Service projects that document will provide the Product Code, Services Cost (an internal value) and the Price to customers to allow you to create quotations in CPQ.

For Time and Material (T&M) products such as Training or Consulting Days, it will provide the quantity and Cost number to apply within your quotation in CPQ. In these cases, Price to Customer is calculated as a function of quantity x price of item.

To obtain LoE's from the Services Team it is important to engage your regional services team early in the opportunity to help shape and scope. The service team will request a solution

proposal that outlines requirements and helps to ask questions to enable the development of LoE and ultimately the Scope of Work

Your opportunity must have an LOE attached, which will be provided or uploaded by the Professional Service prime working the opportunity.

Quotations and Approvals

In the pre-sales phase of the project, Pre-Sales/Sales reaches out to the Practice Leads, to work on the LoE in a joint effort. The latest version of the LoE document must be used for estimations (Practice Leads will always share the actual version to work on). After determining the efforts and preliminary milestones, the LoE document will provide the fee quoted to the customer. That fee will depend on several factors, including region, product line, people involved, and their rates.

Project Milestone	Name of the Phase	Tasks Description	Dependency	Owner	Days/Phase	PM			CONSULT			CONTRACTOR W/ DAILY RATE			TRAINER		
						R1	R2	R3	R1	R2	R3	R1	R2	R3	R1	R2	R3
M0	Pre-Sales	Project management			0												0
		Project-Prework (LoE and SoW creation)															0
		DCQ/SAAR/MI Response Support															0
																	0
																	0
																	0
																	0
																	0
																	0
																	0
M1	Kick-off, SoW & Design Stage	Project management			0												0
		Kick-off Slides prep															0
		DATA/TF Documentation															0
																	0
																	0
																	0
																	0
																	0
																	0
																	0

Scope of Work Documents

The Scope of Work (SoW) document governs the scope, deliverables, responsibilities, milestones, and timelines of the service project. All projects must have an executed SoW in place prior to closing the sales opportunity.

SoWs are developed by the services team, typically the Services Practice Lead that supports your opportunity. The SoW is based on the Solution Proposal, LoE and subsequent meetings or communications between the customer and the Infovista selling team. SoWs are typically developed when the opportunity is in the Commit stage and when it moves into advanced proposal development or early negotiation stage.

SoWs may undergo multiple revisions and review between IV Services and the customer prior to signature. The signature process may take time and require higher levels of customer management or legal review, thus allow time for this phase of activity in your opportunity cycle.

Your opportunity must have a signed SoW attached.

Hand Over Meeting and Project Delivery

At the close of a new sales opportunity involving professional services, a handover meeting is

required where the project is formally handed to the service delivery team. The necessary contacts, review of Scope and related information are provided to the Project Manager and PS personnel responsible for the next phase of the work.

During project delivery, the account team will be copied on relevant meetings and updates and are welcome to contact the project delivery manager for status updates on how the activities are going. In the event of project issues / escalations, identified Change Request, new sale opportunities the project team may notify or require participation and support from the account team.

5.3 Role of the Professional Services SME on the Opportunity Team

- Review and input to Solution Proposal with Pre-Sales:
 - Identifying non-standard requirements for reporting, configuration, etc. that PS would need to implement and identify in advance of scope finalization.
 - Identifying roadmap (not currently available) requirements that PS would need to implement or plan for upgrade in future in scope.
 - Identify where Pro Services are required or can be sold into the deal to bring additional Business Value/Use Cases.
- Input to LoE and SoW, which PS Team will provide.
- Representing Professional Services on customer call(s) to review Scope of Work, answer technical PS questions (or support Pre-Sales on same).

Examples of delivery times and factors that influence delivery:

Ativa App (Assurance), out of the box implementation troubleshooting/analytics, new installation green field:

- Small/medium size customer: 3 months
- Large customer: 6 months

These numbers are high level estimations, based on expert knowledge and historical data and serve indicative purposes only. Factors that influence the delivery time:

- new features
- customizations
- specific use cases
- dependency on partners/customers
- new external integrations
- missed requirements not captured during the pre-sales phase

To help to make the right assessment of the opportunity, a checklist has been created to help you to get the necessary information for successful project delivery.

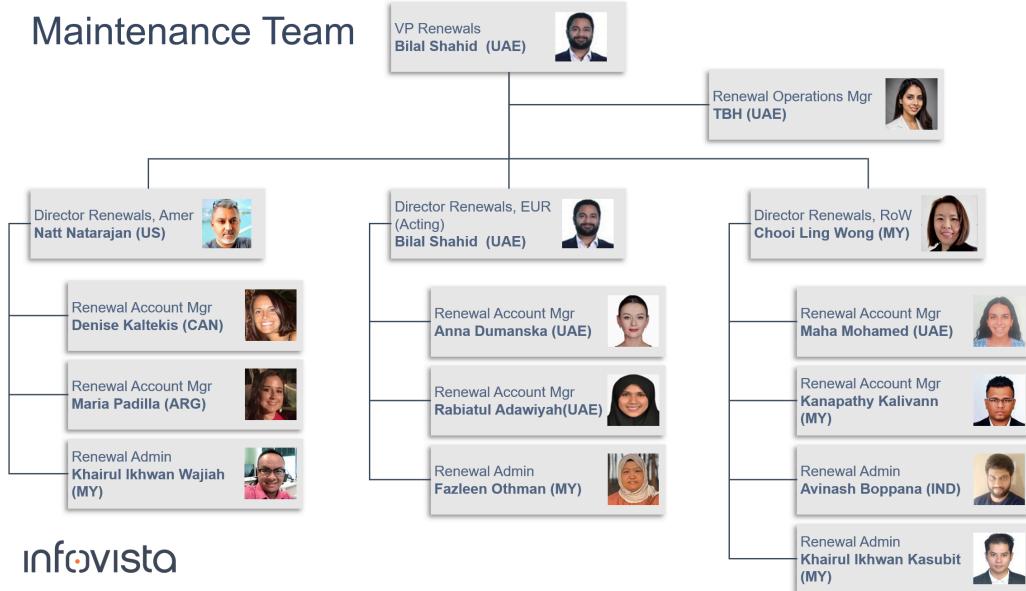
Group	Checklist
General checklist	<ul style="list-style-type: none">● Do we have payment terms?

	<ul style="list-style-type: none"> ● Are there any financial obligations/liability clauses in the contract? ● Does the opportunity have a close out plan? ● Has a timeline been committed? ● What are the customer expectations? ● Who supplies HW with the OS license?
Solution Proposal checklist	<ul style="list-style-type: none"> ● What are the customer requirements? ● Does the solution proposal document align with the RFP? ● Have you used customer network data for HW sizing in the solution proposal? ● Has HW sizing been validated by product management? (*) ● Are there any protocols to be supported? if so, please specify in the solution proposal ● Are there any technologies to be supported? if so, please specify in the solution proposal ● Is product feature gap analysis complete? ● Has the proposed solution aligned with the product roadmap? ● Are there any software features to be delivered? if so, please specify in the solution proposal ● Are there any security vulnerabilities issues to be addressed? if so, please specify in the solution proposal ● Have you identified the opportunity deliverables in the solution proposal? Below is a sample list of deliverables, but not limited to: Software license, Hardware delivery, SW Deployment, Implementation of Dashboards, reports, CDR feeds, third party solution integration, third party CDR feeds integration etc. ● Have you identified any training requirements in the solution proposal? ● Are there any open software issues to be addressed? if so, please specify in the solution proposal ● Has the proposed software upgrade path in the solution proposal been validated by Product Management? ● Is hardware/SW/OS compatibility check complete in the solution proposal? ● Has RFP compliancy been reviewed by Product Management? (*) ● Has the solution proposal been reviewed by Product Management? (*) ● Has the solution proposal been reviewed by customers? ● (*) Applies to major deals only
SOW & LOE checklist	<ul style="list-style-type: none"> ● What is the scope of the opportunity? ● Does the SOW align with the customer requirements, solution proposal and payment terms? ● Have you specified the scope of the opportunity and the acceptance criteria in the SOW? ● Does the customer need out of hours support? ● Does customer need onsite support? ● Have you specified document deliverables (Design, ATP, MOP etc.) in the SOW? ● Does the project milestone in the SOW align with the payment terms? ● Have you specified any assumptions/constraints/risks in the SOW? ● Does the opportunity have a transition to support plan? ● Do we have remote access to customer environment?
Quote checklist	<ul style="list-style-type: none"> ● Has software/OS license cost been included? ● Has the hardware cost been included? ● Has R&D development cost been included? ● Has Professional services cost been included? ● Has the training cost been included? ● Has Managed services cost been included? ● Has Support & Maintenance cost been included?

- Has third party cost (external contractors etc.) been included?
- Has any other cost (onsite support, Travel Expenses cost, etc.) been included?

6 Maintenance

6.1 Organizational structure



6.2 Maintenance forecast File Components, Owners, Cadence



6.3 Maintenance KPIs

Attach Rate Maintenance (New Maintenance)

Definition:

The term "attach rate" typically refers to the percentage or ratio of additional services sold in conjunction with a primary product. It is commonly used in the context of business and sales to measure the success of upselling or cross-selling efforts.

In the context of maintenance services, the maintenance attach rate refers to Maintenance ACV (Annual Contract Value) as a percentage of the product price (Software). It measures the success of encouraging customers to invest in ongoing maintenance and support for the products they own.

Value:

There is no high or low attach rate at Infovista. Target values are set as per the business objectives of the company for each product line. For example, an attach rate of 16% for TEMS is considered good, whereas the same for Ativa would be considered low. We usually look at prescribed rates or target rates per product.

Policy:

Zero discount policy: Maintenance is systematically discounted; therefore, we should not discount it further in CPO. No discounts are provided for maintenance services to maximize the recurring Revenue.

Churn Rate Maintenance (Renewal Maintenance)

Definition

The maintenance churn rate, in the context of business and services at Infovista, specifically refers to the Lost Annual Contract Value.

To calculate the maintenance churn rate, you typically divide the Lost Maintenance ACV by the Total Maintenance ACV.

Value

A low maintenance churn rate is generally considered positive and valuable for several reasons:

Revenue Stability: Maintenance services often contribute to a significant portion of a company's recurring revenue. A low churn rate means that a higher percentage of customers are retaining their maintenance plans, providing a stable and predictable revenue stream for the business.

Customer Satisfaction: A low maintenance churn rate can be indicative of high customer satisfaction. Satisfied customers are more likely to continue using and paying for maintenance services, contributing to a positive customer experience, and potentially leading to positive word-of-mouth referrals.

Long-Term Relationships: Lower churn rates suggest that customers are committed to a long-term relationship with the company. Building and maintaining long-term relationships with customers will result in continued business, loyalty, and potential opportunities for upselling or cross-selling additional services.

Cost Savings: Acquiring new customers can be more expensive than retaining existing ones. A low maintenance churn rate reduces the need for extensive efforts in acquiring replacement customers, saving on marketing and sales expenses.

Brand Reputation: A low churn rate can contribute to a positive brand reputation. Sustained customer relationships and positive feedback from existing customers can enhance the company's image in the market, attracting new customers and partners.

To achieve and maintain a low maintenance churn rate, companies often focus on providing high-quality maintenance services, addressing customer concerns promptly, and continuously improving their offerings to meet evolving customer needs. Regularly monitoring and analyzing churn data can also help businesses identify areas for improvement and implement strategies to enhance customer retention.

Policy

Zero discount policy: Business strategy / policy where no discounts are provided for maintenance services to maximize the recurring Revenue.

CPI/fixed rate Increase Policy: CPI" typically stands for Consumer Price Index, a measure that examines the average change in prices paid by consumers for goods and services over time. Your mention of "CPI Increase Policy" might refer to a policy or strategy aimed at managing or responding to an increase in the Consumer Price Index.

If a government or organization is discussing a "CPI Increase Policy," it could involve several considerations:

Inflation Management: The CPI is often used as an indicator of inflation. If the CPI increases, it suggests that the general price level of goods and services is rising. A policy response might involve measures to manage inflation to ensure economic stability.

Monetary Policy: Central banks often use monetary policy tools, such as adjusting interest rates, to influence inflation. A CPI Increase Policy might involve a central bank tightening monetary policy to curb inflationary pressures.

Wage and Salary Adjustments: In response to rising prices, companies or governments may

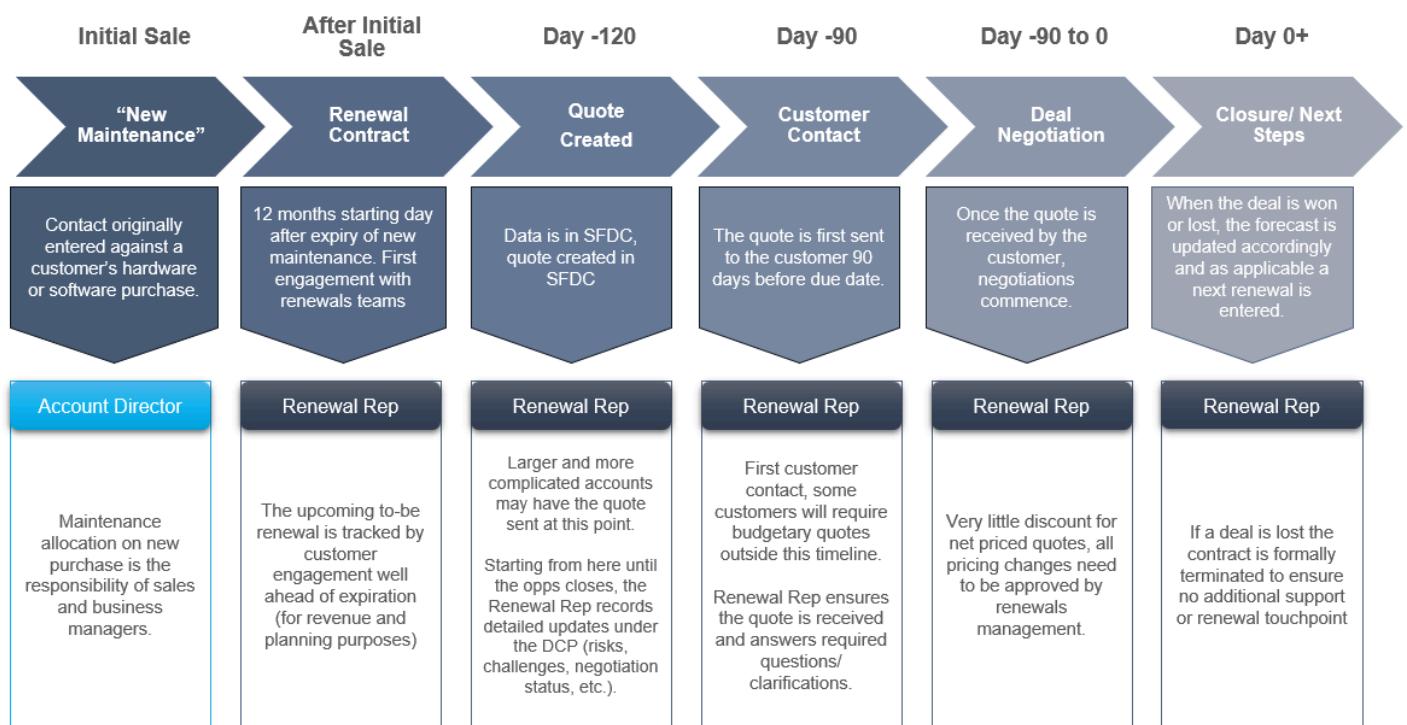
implement policies to adjust wages and salaries to ensure that employees can maintain their purchasing power.

Cost-of-Living Adjustments (COLA): Some organizations and governments have policies in place for cost-of-living adjustments. This involves periodically adjusting payments, such as pensions or social security benefits, based on changes in the cost of living as reflected in the CPI.

Public Policy Responses: Governments may implement various fiscal policies to address the effects of a CPI increase, such as adjusting tax policies, subsidies, or public spending.

Maintenance Renewal Process Components

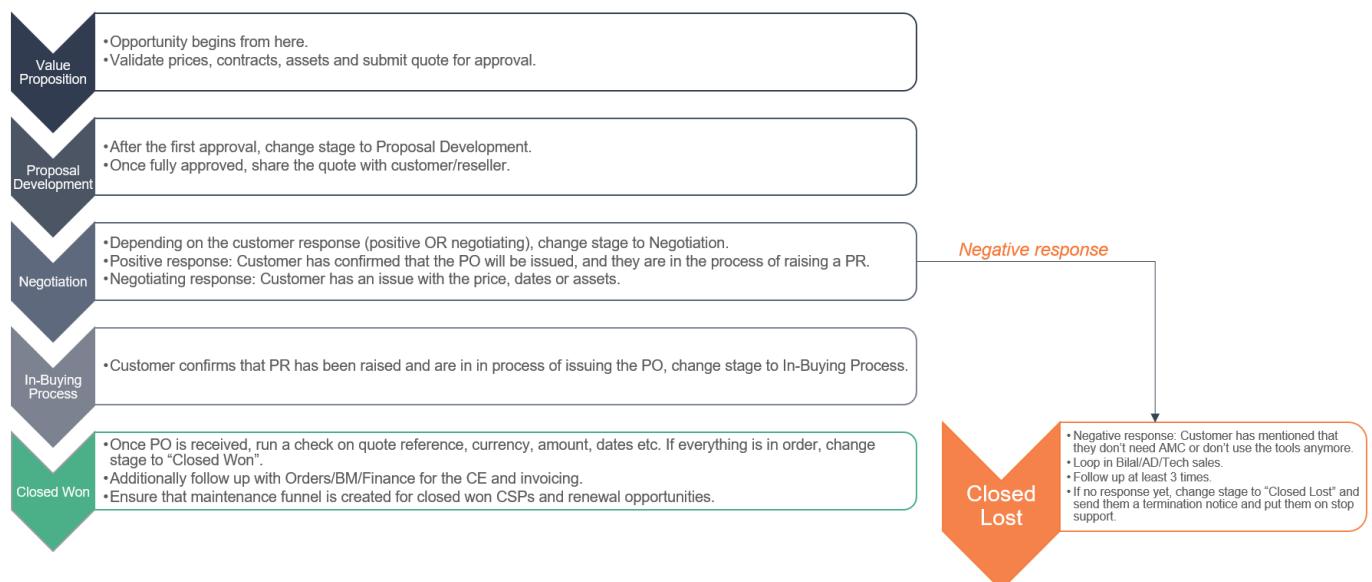
High level process:



Maintenance Opportunity Management

SFDC opportunity process:

Maintenance opportunities are managed directly by the Renewal teams. See below how the team is moving and updating those opportunities:



Maintenance opportunity specificities:

Co-termination of contracts: An account can have many open renewal opportunities spread across the year. We should co-terminate the contracts from these open renewal opportunities and combine them into a master renewal which will facilitate an easier renewal process in the following years.

Delayed Reinstatement: This refers to a renewal opportunity where the assets were not renewed previously (Lost Monitoring).

Descoping: This happens when the customer has requested for some assets to be excluded from the renewal quote. Descoping occurs in one or more ways as listed below:

- Removing legacy connect licenses (Example: Qualcomm License Option, B/C/D/E/F/G/H/J/K/L/M/N, Samsung License Option, A/B/C/D/E/F/G etc.)
- Removal of base licenses.
- Removal of technology licenses (5G/4G).

Minimum Pricing Model for NT:

We have a new minimum pricing structure in place for the below NT product lines:

- TEMS Investigation
- TEMS Pocket
- TEMS Discovery - Professional
- TEMS Discovery - Enterprise
- TEMS Paragon
- TEMS Sense

Furthermore, there are 2 levels of support for the above-mentioned product lines only, namely **AMC** and **ASC**.

Best practices followed by Renewal Reps:

- Prepare & send the maintenance renewal quotations min 90 days before expiry date.
- Ensure high level of data quality of the maintenance renewals database.
- Monitor open CSP opportunity on weekly/monthly basis.
- Ensure CE is processed for all closed won opportunity and invoicing are being done in timely manner.
- Ensure we don't have any mixture of ASC & AMC in one customer for NT.
- Check if the opportunity closed date is correct.
- DCP is updated weekly.
- Identify any commit at risk and find an upside replacement.
- When receiving the approval for a quote with CPI increase, directly resynch back to the base quote amount. (Avoiding pipeline/commit price amount increase).
- For quotes with renewal coverage not equal to 12 months, mention the next renewal value (Base price + CPI increase).
- For any special discount, mention the context (if any) and the next renewal value. (Base price + CPI increase)
- Descoping penalty: 10% of the descoped amount
- When closed won, check the funnel opps: contracts, dates, assets, prices, overlay owner and rename the opps for the ongoing opps. Verify if the invoices are created.
- On a monthly basis visit the renewal funnels for the closed won opps related to the overlay Ads. Check the funnel opps: contracts, dates, assets, prices, overlay owner and rename the opp.

6.4 Weekly Forecast File Assembly

Reports	Cadence & Dependencies	Description
Actuals Revenues	<p>Cadence: Monthly</p> <p>Dependencies: FF Report base & Output is Manual to accommodate split between Deferred/New/Renewal Revenues</p>	Report received from finance providing the split per region, product, customer, order of the monthly recognized revenues.
Deferred Revenues	<p>Cadence: Monthly</p> <p>Dependencies: FF Report base & Output is Manual to accommodate the revenues calculation per month split between Deferred/New/Renewal Revenues</p>	Report received from finance providing the split per region, product, customer, order of the monthly to be recognized revenues in next upcoming months.
Backlog Revenues	<p>Cadence: Monthly</p> <p>Dependencies: SFDC Report base & Output is Manual to accommodate Revenue Calculation & Mapping</p>	Report created each month to capture the revenue schedule of the orders that are yet to be recognized with the identification of the reasons for the hold (specific invoicing schedule, acceptance, Cash Basis ...)
Cash Basis/Blacklisted Forecast Revenues	<p>Cadence: Weekly</p> <p>Dependencies: SFDC Report base & Output is Manual to accommodate Revenue Calculation & Mapping</p>	The identification is done via the Cash Basis List sent by finance, from this potential impacted Revenues are identified and added in a non-Recognized Tab that will feed through the Revenues Tab and these Revenues will be deducted from the overall Revenues (Cushion + recovery plan required).

New Maintenance Forecast Revenues	Cadence: Weekly Dependencies: SFDC Report base – Output is Manual to accommodate Revenue Calculation and Other Metrics i.e., ACV	The New Maintenance Start and End dates are non-existing in SFDC and are theoretically created based on expected Close Date and duration is by default 12 or Picked from the Term Section (specified by sales).
Renewal Maintenance Forecast Revenues	Cadence: Weekly Dependencies: SFDC Report base – Output is Manual to accommodate Revenue Calculation and Other Metrics i.e., ACV, renewal rate, churn rate	The Renewal Maintenance Data contains the Potential Revenue (Last year revenues) and forecast maintenance renewal value start date and end date of the contracts.

6.5 Customer Service

The Annual Support Services comprise Technical Support Services and Update Services (if applicable in accordance with Annex 1) Infovista shall provide assistance in the proper use of the Software Products and shall use reasonable commercial efforts to provide Issue Resolution to Support Issues and to register requests for future enhancements to the Software Products.

The Annual Support Services entitles our customers to TECHNICAL SUPPORT SERVICES and UPDATE SERVICES.

	Terms and Conditions	Quality Charter
Support Services	<u>Global Support Terms November 2014 (infovista.com)</u> <u>Infovista_Global_Hardware_Support_Terms.pdf</u>	<u>Infovista Quality Charter</u>

7 Global Revenue Management

7.1 Business Management, Order Processing, Supply Fulfillment

Infovista Global Revenue Management team primarily consist of three main functions:

Business Management

- Perform deal reviews and assist with quotation reviews for sales opportunities.
- Determine and advise on deal structure and bookings/rev rec implications.
- Review that all required documentation & approvals are attached to the opportunities and compliant with company policies.
- Provide support for Global forecasting of Software Products revenues. NB: Regional President's, Sales VP's and Customer Engagement Directors are Accountable for the revenue forecast within their scope.
- Actively engage with Revenue, Sales, and Supply team members to determine forecast implications, and to maximize revenues from bookings and backlog.
- Perform sales training as required and update/maintain Business Management training

presentation, as needed.

- Perform carveout calculations according to VSOE rate for orders with SW above USD/EUR 50,000 and carveout to be applied for values above USD/EUR5,000.

What is vendor-specific objective evidence (VSOE)?

Software vendors typically sell their products and services in bundled contracts that cover the software license, installation services, training, and post-sale customer support.

Accountants and auditors require so-called **vendor-specific objective evidence (VSOE)** of the fair value of the contract's components so that it can properly determine the value of individual items and recognize partial revenue before the entire contract is fulfilled. If the vendor cannot establish VSOE of fair value, it may have to defer recognizing all revenue until the last element in the contract is delivered.

The purpose of this requirement is prevent companies from reporting revenue before it is actually earned.

- Ensure all contracts, SOW, Reseller Certificates and Apple NDA are signed before processing.
- Check for new customers and remind Sales to complete new customer onboarding and inform Credit Management to run credit checks
- If an order has referral fees, to inform Sales to complete the signing of referral agreement and Deal Registration Form.

Global Order Management

Order Management:

- Review and process Purchase Orders following Company policies
 - ALL POs should be sent to orders@infovista.com
- Review and advise/consult with Business Management / Sales / Legal on deal structure and rev rec implications
- Ensure proper and complete order documentation for each deal:
 - Approved quote
 - PO
 - Valid signed Frame Agreement / Reseller Agreement / One Off
 - Check reseller certificate for indirect deals more than 100 K except a list of resellers.
 - LOE / signed SOW if Consulting / Services
 - credit check if new customer (except for Europe and PO < 10 K with CIA)
 - Signed NDA for Apple products
 - 3rd party vendor quote for 3rd party products
- Launch processes and notifications for software e-deliveries
- Partner with Logistics team on HW/Appliance deliveries
- Notify Invoicing Team once the order is ready to be invoiced

Review and Process:

What is required for OM Team to validate and process a closed won opportunity in SF:

- At CPQ level

- Approved CPQ quote – approved by all relevant levels of management prior to any commercial offers being extended to customer
- **Product features and functionality** – Readily available in the current product version to fulfill delivery
- ALL additional notes to be put in the “**Deal Notes**” section **before** submitting for approval the quote
- Maintenance quantity is always 1 with the subscription term showing the amount of months
- NO negative quantity / amount
- Specific Invoicing instructions should be approved by Finance
- Unless we have a frame agreement signed showing 90 days PT, we cannot accept PT over 60 days for **ANY PO sent to IV SAS**, due to LME French law
- **If there is a start date in the past** mentioned on the quote, this must be specifically mentioned on the PO or requested by the customer (it can be email confirmation).
- To state actual quantity of term licenses to be delivered, especially for multi-years duration

- At PO level

- PO should refer to IV Quote #XXXX or we should have email confirmation that the PO #YYYYYY refers to IV Quote #XXXX
- PO should mention correct IV entity + address + currency
- Delivery date must be within the fiscal quarter, otherwise get customer email for immediate delivery / invoicing confirmation OR get a revised PO to be able to maximize the revenue
- POs containing HW should only be CIP incoterm, but if DDP are mentioned get Business Management greenlight

- At opportunity level in SF, all required fields fulfilled with accurate information

- Account name and bill to address as per PO received from customer to ensure to be paid on time
- Quote IV entity the same as the one on the PO
- Contact for Billing / Physical Delivery Contact / License Delivery Contact should have email address and phone number
- PO number / PO date
- Payment Terms / Incoterm
- ALL required documentation AND documentation shared by the AD should be attached to the opportunity
- 1 quote / opportunity should mirror 1 PO (BOM / price)

- If 2 POs for 1 quote:

1. Written confirmation from the customer that 1 single invoice for both POs will be accepted
OR
2. 2 opportunities created, 1 for each PO, and the same approved quote will be attached to both opportunities

- If 1 PO for 2 quotes:

1. Written confirmation from the customer that 2 invoices will be accepted
OR
2. One global manual invoice to be approved by Invoicing Team

For any other guidelines related to Business & Revenue Management, refers to the [Business & Revenue Management Best practices](#) section .

Billing Management:

The Billing Management team is responsible for generating and issuing invoices for all approved and delivered orders, ensuring timely and accurate billing to customers.

They also manage the invoicing of orders in backlog, streamlining processes to ensure all pending orders are addressed efficiently and in compliance with company policies.

Supply Fulfillment

Supply Management:

- Partnership with suppliers, distributors, and customers, creating communication channels for critical information and operational improvements such as cross docking, direct shipping, and third-party logistics.
- Product design coordination, so that new and existing products can be optimally integrated into the supply chain
- Purchasing decisions for long lead items, Inventory decisions, including quantity, location, type of inventory
- Demand planning and forecasting, coordinating the demand. Inbound operations, including transportation from suppliers and receiving inventory. Outbound operations, including all fulfillment activities and transportation to customers.

7.2 Quote to Cash Collection

1. Sales Create and Submit Quotation for approval (within Salesforce CPQ).
2. Quotation is Approved or Rejected:
 - a. **Approved** – Quote is marked as Primary and synch as main SF opportunity
 - b. **Rejected** – Sales Rep is notified and shall update/discuss and resubmit quote
3. Is this a NEW Partner (Indirect) or Customer (Direct)?
 - a. Need Reseller Agreement (Indirect) or License Agreement (Direct - if not under Infovista Standard Global Terms) [Sales, Business Management, Legal]
 - b. New Reseller/Customer Due Diligence and Credit Check to be performed [Credit Management]
4. Sales, Business Management, and Sales Ops review Software revenue forecast schedule (within SFDC).
5. Customer PO is received, submit to Orders@infovista.com.
6. Business Management team performs initial review of deal completeness and accuracy:
 - a. Proper order documentation (e.g., valid PO, SOW, reseller certification, etc.)
 - b. Reviews for order accuracy (e.g., correct BOM vs. quote, allocation/carveouts, etc.)
 - c. Documentation complete
7. Order Management team creates Customer Engagement (in Financial Force):

- a. Final review of proper and accurate order documentation
 - b. Creation of Customer Engagement Lines within Financial Force which sets up rev rec criteria and creates maintenance contracts
 - c. Submits Customer Engagement for order approval
8. Order is Approved and Processed – Sent to Supply / License delivery fulfillment.
9. Order Deliver:
- a. **Licensing** team delivers software to customer
 - b. **Supply** team procures and deliver hardware to customer, when ready
 - c. Maintenance and Support contracts are created in SFDC and available for **Support** team to see customer has active contract
10. Delivery notification email sent to customer (for Software)
11. Billing Management issues invoice to customers
- 12. Business Management review/update Software revenue forecast schedule (within SFDC)**
13. Cash collection from customer

7.3 Revenue Recognition standards

Infovista principal activity is the development and commercialization of its software products and related services.

A basic set of criteria for revenue recognition exists and these criteria represent the underlying foundation of the detail policies of Infovista revenue recognition policy.

5 steps to determine revenue recognition for goods and services (IFRS 15)



Revenue recognition for Infovista category types:

License – Revenue will be recognized upon delivery. If there are acceptance, will be recognized after acceptance is received

- TEMS > via GLS
- RE & SA > via email delivery from Licensing Team
- 3rd party > via 3rd party email delivery from vendor

Maintenance - Revenue will be recognized on the 1st of the following month after license delivery, on monthly basis automatically in Financial Force. If there are specific requirements from customers for maintenance to start after acceptance date, then the start date will be updated accordingly. The additional period till acceptance will be added into carveout calculation.

Professional Services - Revenue will be recognized after deliverables are completed and acceptance signed off by customer.

Management Fees - Revenue will be recognized on a monthly basis automatically in Financial Force, according to contract period.

Custom Development - Revenue will be recognized when work is completed by R&D team and acceptance signed off by customer.

SaaS - if there is an end point, revenue will be recognized as TERM, ie. in full upfront. If there is no end point, revenue will be recognized monthly based on contract period.

Scanners - Revenue will be recognized when delivery/calibration/repair by vendor is completed and delivered to customer. Supply team to coordinate and confirm.

Geodata - Geodata team to confirm if it will be Off-The-Shelf (OTS) or if requires production, then revenue will be recognized only after production is completed. If OTS, revenue can be recognized when delivery is confirmed by Geodata team.

3rd Party Component - Revenue will be recognized after delivery by 3rd party vendor. Supply team to coordinate and confirm.

Lead Time for Infovista category types:

Category	Lead Time
License	Same day
3 rd party license	2 days
Appliance	2 weeks*
FW	4 weeks
Scanners	4 weeks
Geodata	8 weeks
Custom Dev	12 weeks

*3 weeks for Europe.

Process to handle Firmware with Samsung Tokens

See below the process that needs to take place when Firmware with Samsung Token is required for

any opportunities. It is crucial that these steps are taken to ensure proper tracking of the tokens.

1. Token Purchase Orders (“PO”) insurance:

- a) The Sales AD will provide the end-customer with a Token Request Form1 (see note below) and requests that this form is submitted together with the End-customer’s PO.
- b) The Sales AD will inform the end-customer that invoicing will be done upon receipt of their PO booking. This is vital for large orders (i.e., > 10 Firmware)

2. End-customer PO Issuance

- a) The PO is received from End-Customer
- b) If the Token Request Form is completed and received, then the order is booked and invoiced.

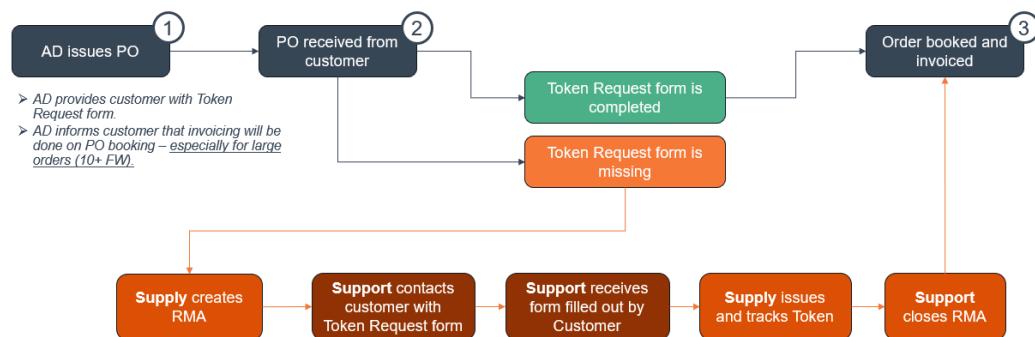
3. If the Token Request Form is not completed or received, the following additional steps will need to take place:

- a) Supply Chain will create a RMA
- b) Support will reach out to End-Customer with the Token Request Form and asks for completion
- c) Once the completed Token Request Form is returned to Support, Supply Chain will issue and track the Token
- d) Support closes the RMA

As a reminder, invoices can be split with separate POs issued; one for the firmware and another for the remaining products. This will also help with CQ bookability, with License portion immediately recognized while Firmware goes through the process.

New process for FW with Samsung Token.

Objective: secure Revenue Recognition.



7.4 Credit Management

Credit Management Team

Here are the key tasks of the Credit Management Team:

- Follow up with the customer for payment
- Document any issues
- Project management
- Update and maintain customer credit status and
- payment terms
- Determine credit limits in terms of amounts and time
- Assess customer risk profile
- Manage credit insurance
- Monitor outstanding payments to optimize cash
- collections and Working Capital
- Accelerate FCF from sales while preserving business
- relationships with customers
- Handle and reduce disputes, organize legal recovery of
- unpaid AR
- Validate any payment facilities
- Prepare reports, monitor KPIs and dashboards on cash
- collection
- Train Sales on cash issues and DSO optimization

Credit Management Policy

Read the latest published [Credit Management Policy here.](#)

See below an extract related specifically to Credit Policy:

1.1 Customer Eligibility:

Credit will be granted to customers following a comprehensive evaluation process that includes reviewing financial statements, credit references, and industry-specific risk factors. A standardized credit application form will be mandatory for all new customers, which will be reviewed and approved by the Credit Manager and the Legal Team.

1.2 Credit Limits:

Credit limits will be calculated based on a combination of the customer's credit score, historical payment behavior, financial strength, and order volume. Initial credit limits will be set conservatively.

and may be adjusted upward after six months of satisfactory payment history. Any credit limit exceeding USD 1,000,000 will require approval from the Chief Financial Officer.

1.3 Credit Terms:

The standard payment terms will be 30 days from the invoice date. Special terms (e.g., Net 45, Net 60, or greater) may be offered based on customer negotiations or strategic importance, subject to prior approval by the Credit Manager. Early payment discounts of up to 2% for payments may be offered selectively to encourage timely payments.

1.4 Credit Scoring:

A credit scoring model will be employed, incorporating factors such as payment history, debt-to-equity ratio, and external credit bureau ratings. Customers scoring below a predetermined threshold will require additional security (e.g., advance payment, Letter of Credit, or collateral).

Credit Customer Policy

Understanding that the list of customers under the Credit Hold / Cash-in-Advance list may evolve at any time, the guidelines below shall be used to determine the financial credit condition of Customers and Resellers. A Reseller or Customer is placed on credit hold or cash-in-advance status when one or more of the following factors exist:

- Reseller's business practices or operating history, competitive pressures, formal or informal communication (oral or written), and/or other factors may indicate that payment on certain reseller arrangements is substantially contingent on the resellers successfully selling and receiving payment for the Company's software (*i.e., back-to-back terms*).
- New resellers that are undercapitalized or in financial difficulty and may not demonstrate an ability to honor a commitment to make a fixed or determinable payment, until they collect cash from their customers. For example, new resellers that are less than 50 persons and who's equity situation is most likely less than the value of the arrangement shall be considered undercapitalized.
- Resellers or Customers that historically pay invoices significantly past (*i.e. more than 6 months overdue*) their contractually stated due date because they have not received payment from the end user.
- Factual confirmation or proof is received from a Company employee, customer, or end user that false representations were made in a reseller certificate that was addressed to the Company.
- Any new Customer or Reseller shall be required to go through the onboarding process which includes:
 - Submission of company Trade license/Registration certificate.
 - Completing the credit check form to undergo credit check.
 - Completion of due diligence form.
 - Last 3 years financial statement (in case of poor credit standing)
- For Customers or Resellers with Invoices >90 days overdue balance, their credit terms will be reviewed, and credit limit reduction may be implemented.
- Customers or Resellers with history of order cancellation (PO cancellation, de-bookings, etc.) in past 12 months with value >30k, their credit terms will be revoked, and future orders will be on cash in advance.

The guidelines above may change from time to time upon CFO's discretion. Any exceptions to these



policies shall only be upon approval from the CFO

8 Sales Compensation

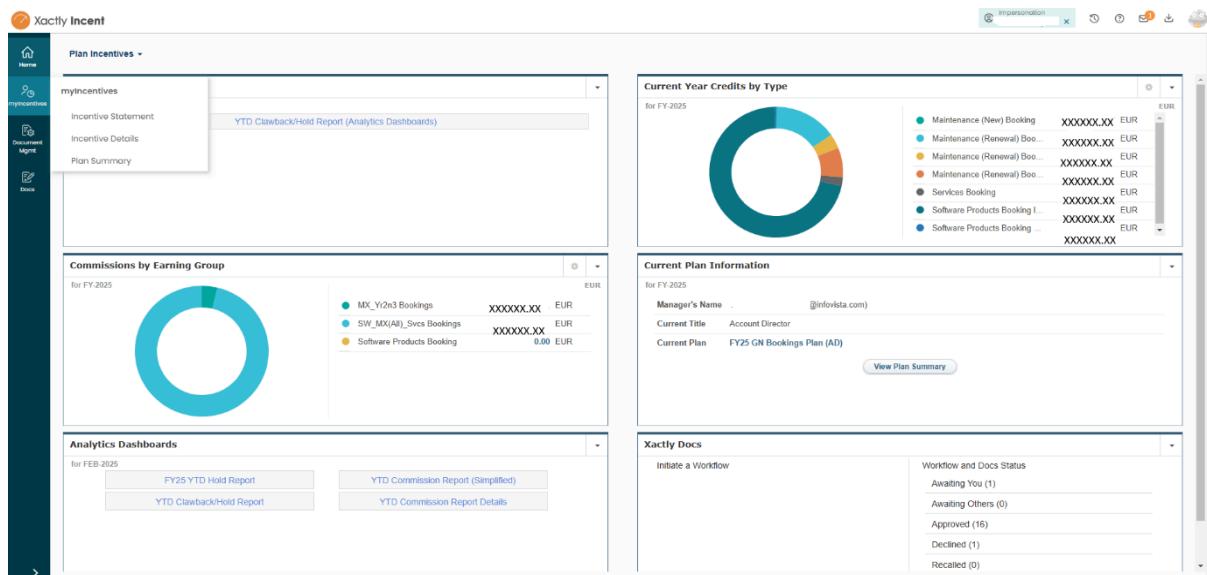
8.1 Xactly

Xactly is a cloud-based platform revolutionizing sales performance management. With automated sales compensation, incentive optimization, and powerful analytics, Xactly empowers businesses to drive sales excellence and achieve strategic goals.

Application Overview

The Xactly Incent application is divided into tabbed areas. Each tab contains a group of features that define a piece of the compensation framework and are targeted towards specific users.

Section 1: Xactly Home Page:



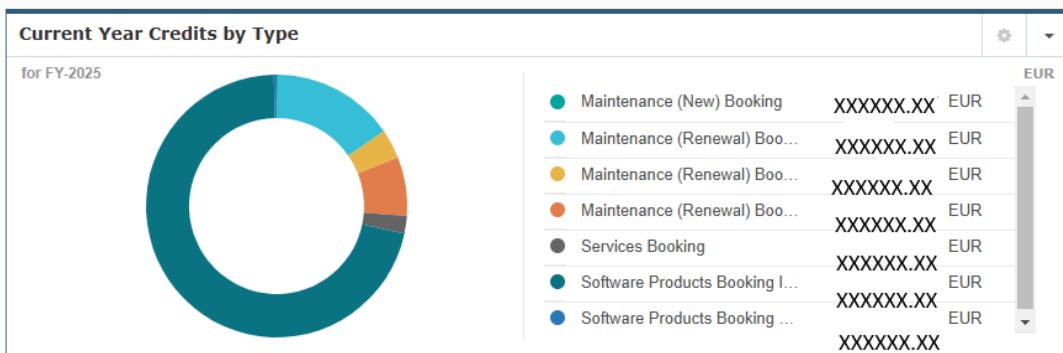
The home screen contains the following subcategories:

1. Messages: - Admin can post any important information in this section.

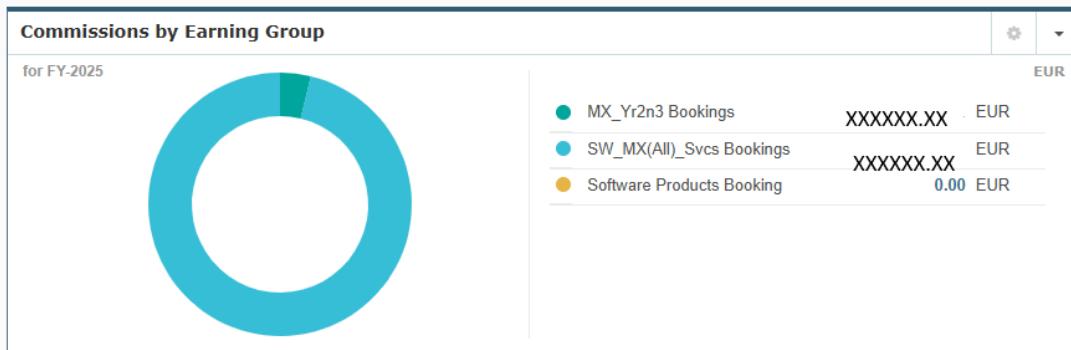
Messages

[YTD Clawback/Hold Report \(Analytics Dashboards\)](#)

2. Current Year Credits by Credit Types: - Displays Credits breakdown.



3. Current Year Commissions by Earning groups: - Displays Commission breakdown.



4. Current Plan Information: - Provides the current plan of an employee, including their title and manager.

Current Plan Information

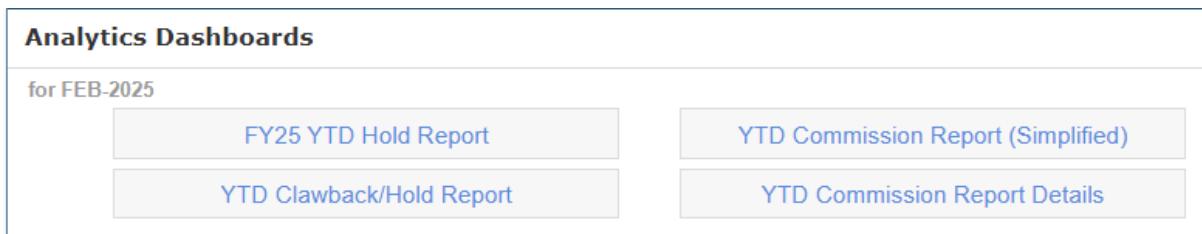
for FY-2025

Manager's Name	XXXXXXXXXXXXXX
Current Title	Account Director
Current Plan	FY25 GN Bookings Plan (AD)

[View Plan Summary](#)

Click on **View Plan Summary** to see more details about the plan. A screenshot is shared below in the Plan Summary section.

5. Analytics Dashboards: -



6. Xactly Docs: -

The primary step for sales representatives is to assess their current year plan, review the

components and detailed information provided in the SIP (Sales Incentive Plan), and approve it.

The screenshot shows the Xactly Docs interface. On the left, there's a button labeled "Initiate a Workflow". To the right, a sidebar titled "Workflow and Docs Status" lists several categories with counts: "Awaiting You (1)", "Awaiting Others (0)", "Approved (16)", "Declined (1)", and "Recalled (0)". At the bottom of the sidebar is a link "View All".

- The SIP appears under the **Awaiting You** section after managerial approval.
- Click on **Awaiting You** to open a new window displaying the plan document with the received date, due date, and document owner.
- To review the SIP document, navigate to the right side and click on **View**.

The screenshot shows the Workflows interface with a search bar and filter options. The results list shows 18 items, with one item highlighted: "FY25 Document Routing - Type Plan Document | 0 Comments | Read". To the right of the list is a "View" button, which is highlighted with a red box.

- Upon review, take the necessary action: **Accept** or **Decline**.
- Click **Download** to open the PDF file, then print or save the SIP document for individual reference.

7. Team Overview:

This section is visible only to managers, allowing them to view their team members' performance.

The screenshot shows the Team Overview interface. It displays a table with four rows, each representing a team member. The columns are "Name of the Team Member (Email ID)" and "Payment Amount". The "Payment Amount" column shows values like "xxxxxxxxxx USD", "xxxxxxxxxx USD", "xxxxxxxxxx JSD", and "xxxxxxxxxx USD". The "USD" unit is indicated at the top right of the column header. There are navigation arrows at the bottom of the table.

Section 2: 'MyIncentives' tab has three sub-tabs, as shown in the below screenshot.

The screenshot shows the "myIncentives" interface. On the left, there are two tabs: "myIncentives" (selected) and "myTeam". On the right, there are three sub-tabs: "Incentive Statement", "Incentive Details", and "Plan Summary".

1. **Incentive Statement:** Review incentives at the component level.
- Select the **Year** (e.g., FY-2025). A period drop-down list will appear, allowing users to choose the desired reporting period.

Incentive Statement FY-2025 ▾

- Provides detailed information about employee names, managers, target incentives, EMP IDs, role types, and more.

Note: Please verify if all the details are accurate. If corrections are needed, contact venu.katakaiyah@infovista.com or SalesComp@infovista.com

Payments: View payments for the current period, previous period, and year-to-date.

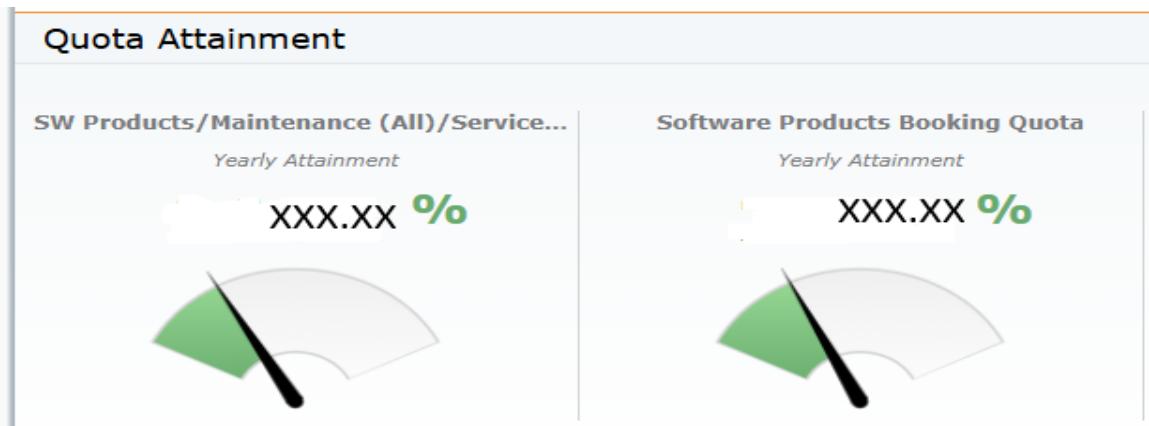
The screenshot shows the 'Incentive Statement' page for the fiscal year 2025. It displays the following information:

- Name of the Sales Rep:** Sales Rep EMAIL ID: @infovista.com
- Role:** Account Director
- Manager:** @infovista.com
- Business Unit:** GN
- BU Team:** GN - Europe
- Mapping:** Not Applicable
- Employee ID:** [redacted]
- Target Incentives:** EUR
- Maintenance Renewal Overlay Acct:** All AA renewal maintenance activities, includin...
- Product Family Focus:** NT/RE/AA

Payments:

Period	Amount	Currency
Current Period: FEB-2025	0.00	EUR
Previous Period: JAN-2025	0.00	EUR
Year to Date: FY-2025	[redacted]	EUR (% of OTE)

Yearly Quota Attainment: Displays a pictorial graph of yearly quota attainment, credits applied, and commissions earned to date.



Manager's View

Managers can view their team's incentive statements by clicking the **My Team** section and selecting **Team Incentive Statements**.

The screenshot shows the 'myTeam' section with the following links:

- Team Incentive Statements
- Team Incentive Details
- Team Plan Summary

Full Report Section

Provides detailed information about quotas, credits, commissions, and payment details for different periods (monthly, quarterly, and full year).

Full Report								
Quotas								
SW Products/Maintenance (All)/Services Booking Quota (EUR)	FY-2025	QTR-1-FY25	OCT-2024	NOV-2024	DEC-2024	QTR-2-FY25	QTR-3-FY25	QTR-4-FY25
SW Products/Maintenance (All)/Services Booking Quota Credit (EUR)								
Yearly Attainment (%)								
YTD Attainment (%)								
Software Products Booking Quota (EUR)								
Software Products Booking Quota Credit (EUR)								
Yearly Attainment (%)								
YTD Attainment (%)								
Credits								
Maintenance (New) Booking (EUR)	FY-2025	QTR-1-FY25	OCT-2024	NOV-2024	DEC-2024	QTR-2-FY25	QTR-3-FY25	QTR-4-FY25
Maintenance (Renewal) Booking (EUR)		0.00	0.00	0.00			0.00	0.00
Maintenance (Renewal) Booking Yr1 (EUR)		0.00	0.00	0.00			0.00	0.00
Maintenance (Renewal) Booking Yr2n3 (EUR)		0.00	0.00	0.00			0.00	0.00
Services Booking (EUR)		0.00	0.00	0.00			0.00	0.00
Software Products Booking IV Prod (EUR)		0.00	0.00	0.00			0.00	0.00
Software Products Booking Non-IV Prod (EUR)		0.00	0.00	0.00			0.00	0.00
Commissions								
MX_Yr2n3 Bookings (EUR)	FY-2025	QTR-1-FY25	OCT-2024	NOV-2024	DEC-2024	QTR-2-FY25	QTR-3-FY25	QTR-4-FY25
SW_MX(All)_Svcs Bookings (EUR)		0.00	0.00	0.00			0.00	0.00
Software Products Booking (EUR)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Payments								
Total Commissions Pending (EUR)	FY-2025	QTR-1-FY25	OCT-2024	NOV-2024	DEC-2024	QTR-2-FY25	QTR-3-FY25	QTR-4-FY25
		0.00	0.00	0.00			0.00	0.00

8.2 Credits

Detailed information about monthly credits can be viewed by clicking on the underlined cell, categorized by customer, product, order code, and credit type.

Credits								
Maintenance (New) Booking (EUR)								
Maintenance (New) Booking (EUR)	FY-2025	QTR-1-FY25	OCT-2024	NOV-2024	DEC-2024	QTR-2-FY25	QTR-3-FY25	QTR-4-FY25
Maintenance (Renewal) Booking (EUR)		0.00	0.00	0.00			0.00	0.00
Maintenance (Renewal) Booking Yr1 (EUR)		0.00	0.00	0.00			0.00	0.00
Maintenance (Renewal) Booking Yr2n3 (EUR)		0.00	0.00	0.00			0.00	0.00
Services Booking (EUR)		0.00	0.00	0.00			0.00	0.00
Software Products Booking IV Prod (EUR)		0.00	0.00	0.00			0.00	0.00
Software Products Booking Non-IV Prod (EUR)		0.00	0.00	0.00			0.00	0.00

8.3 Commissions

- According to GN T&C, the following commission hold conditions apply
 - For deals with standard payment terms over 60 days (Europe and Americas) and over 90 days (ROW), only 50% of the commissions will be released after bookings.
 - The remaining 50% will be held and released after full cash receipt.
- The **Held** section in the screenshot shows the commissions on hold for that month.
- Once the hold is released, it will appear in the **Holds Released** section.

Here's a simple explanation of how "Holds" work using dummy numbers
Payment/Commission Calculation Example

- Released:** \$2,500.00 (commission amount released)
 - Holds Released:** \$150.00 (previously held amounts now released)
 - Final Payment / Commission:** \$2,500.00 + \$150.00 = \$2650.00 (Released + Holds Released)
 - Current Held:** \$150.00 (amount on hold)
- This will remain as "Hold" until a further full cash receipt is confirmed.

Commissions						
	FY-2025	QTR-1-FY25	OCT-2024	NOV-2024	DEC-2024	QTR-2-FY25
MX_Yr2n3 Bookings (USD)			0.00	0.00	0.00	0.00
SW MX(All) Svcs Bookings (USD)						
Released	2500.00	1500.00			1000.00	
Held	150.00	100.00	0.00	0.00	Amt Held for Dec-25	50.00
Holds Released	150.00	100.00	0.00	0.00		50.00
Software Products Booking (USD)	0.00	0.00	0.00	0.00	0.00	0.00
Payments						
	FY-2025	QTR-1-FY25	OCT-2024	NOV-2024	DEC-2024	QTR-2-FY25
Held Commissions (USD)	150.00	100.00	0.00	0.00	50.00	
Total Commissions Pending (USD)	2650.00	1600.00			1050.00	
Final Payment including Holds Released						

- Each month detailed information about Commissions can be viewed by clicking on the Cell (which is underlined) by Customer wise, Product wise, Order code wise with Commission Amount and Commission rates.
- Can Download details by clicking onto [Download Details](#) as shown below.

Detailed Drill Down						
Download Details Processed Orders Credits Commissions Bonuses Payments Close						
Period	DEC-2024 (Open)	Customer Name	Product Name	Order Code	Item Code	Incentive Date
		Customer 1	Network Testing	0063X000015ZAlq_9203-2002_185	Maintenance_Maintenance Renewal_Dec-2024	12/27/2024
		Customer 2	Network Testing	006aT00000chJvL_TP-SAM-NoToken-FW_798	Software Products_CSP_Dec-2024	12/27/2024
Search		Customer 3	Network Testing	006aT00000chJvL_TP-SG-NR_531	Software Products_CSP_Dec-2024	12/27/2024
		Customer 4	Network Testing	006aT00000chJvL_TDP-Tech-SG_618	Software Products_CSP_Dec-2024	12/27/2024
		Customer 5	Network Testing	006aT00000chJvL_TP-BP-V4-CarPwr_881	Software Products_CSP_Dec-2024	12/27/2024

8.4 Payments

View detailed monthly payment information by clicking on the underlined cell, categorized by opportunity name, customer, product, order code, commission amount, and payment details.

Details								
Results for DEC-2024 (243)								
Status	Order Code	Order Item Code	Customer	Opportunity Name	Product Code	Order Type	Credit Amount	Commission Amount
PENDING	Order Code 1	Maintenance_Maintenance Renewal_Dec-2024	Customer 1	Opportunity 1	9201-2002	Maintenance	EUR	XXXX.XX USD
PENDING	Order Code 2	Software Products_CSP_Dec-2024	Customer 2	Opportunity 2	TDI-FL-DP	Software Products	EUR	XXXX.XX USD
PENDING	Order Code 3	Software Products_CSP_Dec-2024	Customer 3	Opportunity 3	TP-Com-SW-T12	Software Products	EUR	0.00 USD
PENDING	Order Code 4	Software Products_CSP_Dec-2024	Customer 4	Opportunity 4	TDP-Tech-SG	Software Products	EUR	0.00 USD

1. Incentive Details:

- Provides detailed information by opportunity name, orders, and customer-wise credits and commissions reports.
- Includes line-level payment values for each component at the customer level.

Incentive Details

Name of Sales Rep: [Redacted] | Sales Rep Email ID: @infovista.com | Title: Account Director | Total Target Incentives: XXXXX,XX USD

Summary

Total Commissions Pending	Total Commissions Paid
DEC-2024	DEC-2024
USD	0.00 USD

Details

Results for DEC-2024 (243)

Status	Order Code	Order Item Code	Customer	Opportunity Name	Product Code	Order Type	Credit Amount	Commission Amount
PENDING	Order code 1	Maintenance_Maintenance_ Renewal_Dec-2024	Customer 1	Opportunity 1	9201-2002	Maintenance	XXXX,XX EUR	XXXX,XX USD
PENDING	Order code 2	Software_Products_CSP_Dec-2024	Customer 2	Opportunity 2	TDI-FL-DP	Software Products	XXXX,XX EUR	XXXX,XX USD

2. Plan Summary

- Provides detailed information on an employee's plan, quotas, and commission rates.
- Commission rates may vary from employee to employee.
- Detailed quota information is available quarterly and annually.

Plan Summary

Title: Maintenance Renewal VP | Manager: [Redacted] | Employee ID: [Redacted] | Region: Global | MX_Renewal_Overlay_Account: [Redacted]

Plan Quotas

Maintenance (All) Revenue Quota	FY-2025	QTR-1-FY25	QTR-2-FY25	QTR-3-FY25	QTR-4-FY25
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]

Commission Rates

FY25 MX All Revenue - Bilal S		FY25 MX Renewal Booking - Bilal S	
Attainment	Rate	Attainment	Rate
0.00 % - 75.00 %	%	0.00 % - 65.00 %	%
75.00 % - 92.00 %	%	65.00 % - 90.00 %	%
92.00 % - and above	%	90.00 % - and above	%

- Detailed Quota information by Quarterly & Full Year
- Commission rates vary from Employee to Employee.

Section 3: Document Management □ Status

Indicates the status of individual plan documents, whether **Completed** or **In Progress**.

Status	Person Name	Manager Name	File Type	File Name	Route Date	Completed Date	Manager Response ..
IN PROGRESS	Name of the Sales Rep	Name of the Manager	Plan Document	FY25 GN Bookings Plan ..	08/22/2024 08:52 AM EDT		08/27/2024 06:55 AM EDT

Section 4: Docs □ Track

Tracks the workflow status of plan documents, which can be **Pending**, **Approved**, **In Review**, or **Declined**.

Document Name	Workflow Status	Document Owner	Workflow Owner	Initiator	Position Name	Comments	Date Sent	Completion Date
FY25 Document Routing - 7_2	PENDING		Ashutosh Kumar Jha			0	10/07/2024 02:54 AM EDT	
FY24 Side Letter Affidavit - Own..	APPROVED		Jayson Lim			0	05/29/2024 11:38 AM EDT	05/29/2024 12:31 PM EDT
FY24 Side Letter Affidavit - Own..	APPROVED		Jayson Lim			0	02/23/2024 10:54 AM EST	03/14/2024 04:18 AM EDT
FY24 Plan Document Addendum	APPROVED		Jayson Lim			0	01/17/2024 11:33 AM EST	01/17/2024 11:33 AM EST

Note: By the 25th of every month, complete data will be updated in Xactly for review.

Contact for Queries

For any questions or concerns regarding commissions and Xactly related issues please contact:
venu.katakaiah@infovista.com or SalesComp@infovista.com

9 Other topics

9.1 SFDC Dashboards

Following are some of the dashboards built by Sales Operations team that be leveraged to get a holistic view of the sales performance. Please note most of these reports do have multiple filters, that enables further drill downs. Please reach out to Sales Ops if you have any queries suggestions.

9.2 Compliance with Embargoed Countries Regulations

As part of our commitment to comply with international regulations, it is crucial that we are mindful of where we trade.

We have uploaded the full list of embargoed countries in SharePoint (link: [2024-10_Embargoed_Countries.docx](#)) which will be updated when necessary. For your easy reference, please see below a summarized view:

	Black List	Grey List	White List	Specific Regions	Additional Countries
	Belarus (US, UK, EU)	Venezuela (US, EU)	Lebanon (US, EU)	Crimea (US, UK, EU)	Afghanistan
	Cuba (US)	Myanmar (Burma) (US, UK, EU)	Democratic Republic of the Congo (US, EU)	Donetsk (US, UK, EU)	Balkans
	Iran (US, EU)	Zimbabwe (US, EU)	Somalia (US, EU)	Luhansk (US, UK, EU)	China
	North Korea (US, UK, EU)	Libya (US, EU)	Yemen (US, EU)		
	Syria (US, UK, EU)	Central African Republic (US, EU)	Nicaragua (US)		
	Russia (US, UK, EU)	Eritrea (US, EU)	Ethiopia (US, EU)		
	Sudan (US, partially lifted but some sanctions remain)	South Sudan (US, EU)	Hong Kong (US)		
			Mali (US, EU)		
Implications	No-Go	Restricted Engagement	Selective Engagement	No-Go	Companies must avoid transactions with specific individuals and entities, particularly those linked to human rights violations and military activities.

9.3 Tools at Infovista

Salesforce

Salesforce is a powerful cloud-based platform designed to streamline customer relationship management (CRM) for businesses. It serves as a centralized hub for managing sales, marketing, and customer service operations, providing a unified and efficient solution. With its user-friendly interface and customizable features, Salesforce empowers organizations to enhance customer engagement, optimize workflows, and make data-driven decisions, ultimately fostering business growth.

Salesforce

Einstein

Einstein Analytics, Salesforce's Business Intelligence (BI) tool, is a dynamic analytics platform designed to extract actionable insights from your data. With its intuitive interface and AI-driven capabilities,

Einstein Analytics transforms complex datasets into visually compelling and easily interpretable reports and dashboards. By leveraging advanced analytics and predictive modeling, organizations can make informed decisions, uncover trends, and drive strategic initiatives within the Salesforce ecosystem.

[Einstein Analytics Studio](#)

Financial Force

FinancialForce is a cloud-based financial management platform intricately woven into the Salesforce ecosystem, providing a seamless and comprehensive solution for financial operations. Tailored for businesses of all sizes, FinancialForce combines robust accounting capabilities with Salesforce CRM integration, offering a unified platform for managing finances, revenue recognition, billing, and resource planning. With FinancialForce, organizations can streamline their financial processes, gain real-time insights, and ensure alignment between financial and customer relationship management functions.

[Financial Force](#)

Yooz [New requisition platform]

A purchase requisition process exists within Infovista to account for procurement activities, which includes, but not limited to, vendor/supplier purchases, commission payment and other external service payments.

The tool "Yooz" is used to raise Purchase Requests. Each category of purchase/payment requires a specific Cost Center (and GL Account, which auto chosen usually).

The below cost centers should be used when we are purchasing something to be used internally within the Sales team.

- **General Sales:**

- 5030 – CSP Sales
- 5230 – GCC Sales

- **Alliances/Partners:**

- 5300 – Global Partner
- 5035 – CSP Strategic Alliances
- 5231 – GCC Channels

- **Inside Sales:**

- 5000 – CSP Inside Sales
- 5101 – GCC Inside Sales

- **Pre-sales:**

- 5010 – CSP Presales
- 5210 – GCC Presales

- **Renewals:**

- 5050 – CSP Service Order Admin
- 5250 – GCC Services Order Admin

- **Business/Order Management:**

- o 5040 – CSP Sales Order Admin
- o 5240 – GCC Sales Order Admin

When we are purchasing something (like maintenance support) that is being resold to a customer or directly drives revenue with a customer, we use the 1000 – Cost of Sales cost center.

If you're not aware of what Cost Center to choose for the appropriate request, you can reach out to the following persons according to the paying Entity.

Flora Yii	– Dubai, China, Singapore, AUS
Friscilla G	– US, Japan
Catherine FI, Noel O	– US
Richard K, Lisa H	– UK , Sweden

The other fields that are important are Purchase Category and Purchase Type. These fields drive where the cost is categorized within the cost center – i.e. personnel costs, variable costs, legal fees, etc. Below is a link to a page which provides a good breakout of which category/type should be used in certain scenarios.

Tomorro

Tomorro is a cloud-based financial management solution integrated with Salesforce, offering a streamlined platform for financial operations. Tailored for businesses, it combines robust accounting with Salesforce CRM, providing a unified approach to managing finances, billing, and resource planning. Leeway enables organizations to enhance efficiency, gain real-time insights, and align financial processes seamlessly within the Salesforce ecosystem.

Tomorro

Lucca

Lucca is a modular HRIS designed to optimize HR and administrative processes. It offers the following solutions:

- **Timmi Office** - Facilitates hybrid work management by allowing employees to declare remote or in-office days.
- **Timmi Absences** – Manages leave and absences with automated requests, approvals (for employees only. No approval is required for short/long term contractors or third parties), and calendar integration.
- **Timmi Timesheet** – Tracks working hours, automates overtime calculations, and ensures compliance.
- **People Core HR** – Centralizes employee data, streamlines onboarding, and automates administrative tasks.
- **People Performance** – Facilitates performance reviews, goal tracking, and employee

development.

- **Coworkers** – Improves team visibility and collaboration.
- Upcoming: Engagement & Compensation – Tools for measuring employee engagement through surveys and managing compensation.

Lucca

If you have any questions, please contact your local HR:

- Americas: Nidhi Joshi
- UK: Zainab Shawki or Clare Stewart
- Italy: Zainab Shawki or Joanne Stenton
- Sweden: Zainab Shawki or Ewa Furtenback
- Rest of Europe: Zainab Shawki or Florian Walle
- UAE: Zainab Shawki or Gigi Gregorio
- Malaysia: Zainab Shawki or Fareha Musa
- Rest of APAC: Zainab Shawki or Fareha Musa

Or your HRBP, Audrey Monteil

Sharepoint

SharePoint, a Microsoft product, is a powerful collaboration and document management platform. It centralizes teamwork by enabling real-time collaboration on documents, projects, and tasks. With features like document version control and integration with Microsoft 365, SharePoint enhances productivity and provides a secure environment for content creation and sharing.

SharePoint

Adaptive

Workday Adaptive Planning, formerly known as Adaptive Insights, is a leading cloud-based financial planning and analysis (FP&A) tool. Designed to simplify and enhance the budgeting, forecasting, and reporting processes, this platform empowers organizations to make informed financial decisions with agility and precision.

Adaptive

CPQ

Salesforce CPQ simplifies the Configure, Price, Quote process by automating product configuration, pricing, and quote generation within the Salesforce platform. It boosts sales efficiency, minimizes errors, and accelerates the sales cycle, ensuring accurate and consistent quotes for a streamlined and responsive sales experience.

9.4 Revenue Operations Activities

Forecast calls (Weekly basis)

Every week a forecast meeting is held, where key stakeholders, including sales VPs, review and analyze the deals in the pipeline for the current quarter. The focus is on assessing the likelihood of closing deals, identifying potential issues, and aligning strategies to meet sales targets.

The Sales Operations team plays a crucial role in the weekly forecast call by preparing and providing essential information for discussion. This includes compiling data on deal progress, pipeline health, and other relevant metrics. Additionally, the Sales Operations team ensures that the follow-up action items and strategies discussed during these calls are effectively implemented. Their contribution helps streamline decision-making processes and enhances the overall effectiveness of the sales forecasting and planning activities.

Weekly Operational Review (Weekly basis)

A WOR meeting is a recurring weekly session where teams evaluate and discuss the ongoing operational aspects of the business, crucial for maintaining organizational efficiency. This includes assessing key performance indicators, addressing challenges, and aligning strategies to meet goals. The Sales Operations team plays a vital role in preparing essential content for these meetings, ensuring comprehensive insights and facilitating informed decision-making across various departments.

Pipe Discovery calls (Monthly basis)

In a monthly basis, leaders from the Product team engage with regional Vice Presidents to delve into pipeline discussions. These meetings aim to identify and address product-related issues, ensure the quality of our pipeline, and gain insights into pipeline creation and losses. The Sales Operations team plays a critical role in addressing action points from these sessions and is instrumental in creating and maintaining dashboards that monitor key performance indicators related to the pipeline.

Quarterly Business Review (Quarterly basis)

A Quarterly Business Review (QBR) is a comprehensive assessment and strategic review of a company's performance, objectives, and key initiatives conducted on a quarterly basis. The Sales Operations team plays a crucial role in preparing essential information for these reviews. They compile and analyze data related to sales metrics, pipeline health, and customer engagement, offering valuable insights that contribute to a comprehensive understanding of the business landscape. This team ensures that leadership receives well-organized and accurate information, enabling informed decision-making during the QBR process.

Compensation Planning (Yearly basis)

Compensation Planning meetings focus on designing, evaluating, and adjusting the compensation structure for sales representatives. These meetings typically occur often annually, to align incentives with our organizational goals, motivate sales teams, and ensure competitiveness in the market. The Sales Operations team plays a crucial role in these meetings by providing data-driven insights, market benchmarks, and analysis of past performance metrics. They contribute to the strategic decision-making process, helping to design a compensation plan that not only attracts and retains



top talent but also aligns with the company's overall sales objectives. Additionally, Sales Operations ensures the effective implementation and communication of the finalized compensation plans across the sales organization.

Dashboards/Reports preparation (Ad hoc basis)

The Sales Operations team is instrumental in enhancing decision-making processes within our organization by constructing on an ongoing basis comprehensive dashboards and generating insightful reports. Through the aggregation and analysis of key data points, these dashboards offer a visual representation of critical performance metrics, aiding leadership in understanding trends, identifying areas for improvement, and making informed decisions. Additionally, the team's proficiency in producing detailed reports contributes to a deeper understanding of sales dynamics, facilitating strategic planning and continuous optimization of sales strategies.

SFDC Management (Ad hoc basis)

Sales Operations team takes on a central role in the administration and optimization of Infovista's Salesforce CRM platform. Their responsibilities involve configuring and fine-tuning the CRM system to harmonize with the unique intricacies of the organization's sales processes and objectives. This includes vigilantly managing data accuracy, implementing automation workflows, and ensuring seamless integration with other business systems. Beyond technical duties, the team provides essential user support, conducts training sessions, and utilizes their proficiency to customize the CRM platform, empowering sales teams for heightened efficiency, accurate reporting, and strategic decision-making.

Einstein Analytics Management (Ad hoc basis)

Einstein Analytics, a business intelligence tool by Salesforce, empowers organizations to delve into advanced analytics directly within the Salesforce platform. Managed and developed by the Sales Operations and BizzApps teams, this tool harnesses artificial intelligence and machine learning to create interactive dashboards and reports. Tailored for sales, service, and marketing processes, Einstein Analytics enables the Sales Operations team to seamlessly integrate powerful analytics capabilities into Salesforce CRM, facilitating data-driven decision-making and the identification of critical business insights.

SFDC Pipe Hygiene (Weekly basis)

On a weekly basis, the Sales Operations team communicates with each account director company-wide, highlighting deals in their current quarter pipeline funnel that deviate from pre-established organizational rules. The primary objective is to maintain the utmost accuracy and integrity in the company's pipeline, fostering high-quality prospects and subsequently boosting confidence in positive pipeline conversion, ultimately contributing to an increased company win rate.

Opportunity Review by Solution Engineering (Bi-Weekly)

Bi-weekly the Solution Engineering Team reviews the opportunities of the Current Quarter and Next Quarter. It includes, but not limited to reviewing the proposed solution, availability of functionality/devices etc. Accordingly, actions such setting up additional review on the opportunity, updating the solution document etc. will noted. Special focus is given on Custom Dev opportunities, with AHA!. The AHA!s are also reviewed during this call.

Two Separate calls take place bi-weekly, one for NT/RE (lead by Bruce) and one for AA (lead by Hazem).

Sales ops Team extracts the report of the relevant opportunities with its mapping with the AHA!s, along with the comments/actions of the previous call/meetings.

9.5 Admin Policy

Travel Policy

All arrangements required for business travel are to be made through the designated Travel Company via Concur. Direct travel reservations are not allowed except explicitly stated in this policy.

All airfare and rail travel will be paid by Infovista through the designated Travel Company.

Advance Bookings: All air / rail travel, hotel reservations need to be booked at least 14 days ahead of the travel date in order for lowest air rates. Deviation on this EXCOM member approval.

Low-cost ticket bookings are allowed but are usually non-cancellable and non-refundable. These tickets are booked outside the designated Travel Company. It is the employee's responsibility to ensure that cost and risk-benefits are balanced. Repetitive non-attendance may result in investigations, and no refunds will be granted for these tickets.

Expense guidelines

All air travel must be in economy class. Premium economy is permitted for individual segments longer than 6 hours but requires prior approval from an EXCOM member. Utilizing the lowest logical airfare is expected.

Pre-booking of air tickets outside Concur is permitted only for low-cost airlines. Employees are permitted to retain benefits from frequent flyer and hotel guest programs. However, airline and/or hotel selections must be at the lowest and most efficient rate as determined by the Travel Company. Awards from such programs may be retained by travellers for personal use but should not influence airline or hotel selection. Travellers are required to accept the lowest logical airfare.

More information on expensing policies can be found in the link below.

[Book Your Travel - Infovista Travel Policy.pdf - All Documents \(sharepoint.com\)](#)

Time off request

To ensure business continuity and maintain peak performance during critical periods, we ask all Sales and Sales Support staff to follow these guidelines when requesting time off:

- End-of-Quarter availability: Given the high-impact nature of the closing period, time-off requests will not be approved during the last weeks of each quarter.
- Extended absences: For any time-off request exceeding 10 business days, please submit your request at least two months in advance to allow for proper planning and workload distribution.

Employee Spotlight

We have developed a new feature on the employee spotlight: you can now spotlight someone who embodies our values. Recognizing and celebrating the people who truly live our values on a daily basis becomes easier! For those who have forgotten, the link to the spotlight is [here!](#)

9.6 Helpful contacts and links

Contacts

- **CPQ Assistance** – Please contact CPQQuotingAssistance@infovista.com for any questions about CPQ
- **SalesOps** – Please contact Sales_ops@infovista.com if you need assistance with SFDC related topics, creation of customized reports or any other information about the sales process
- **Commissions** – Please contact Salescomp@infovista.com for any questions about commissions
- **Orders** – Please contact orders@infovista.com for any question about PO either from inside or outside our organization
- **Global orders management** – Please contact GlobalOrderManagement@infovista.com if you need any kind of support during PO closure process
- **Invoicing and Credit Management Teams** – Please contact globalinvoicing@infovista.com or credit.management@infovista.com for any question about invoices.
- **Marketing** – Please contact marketing@infovista.com if you have any questions or issues related to Marketing Leads, MQL, Marketing opportunities in Salesforce, Marketing campaigns or communication on social media.
- **HR** – Please contact hr@infovista.com if you have any questions related to Human Resources.

Links

- **Infovista SharePoint** – Please [follow this link](#) to access our company's SharePoint homepage. There you will find all the necessary information on all Infovista different departments
- **Sales Portal** – Please [follow this link](#) to directly access our sales department site and all related necessary and up-to-date information
- **LMS training** – Please [follow this link](#) to access our exclusive and diversified training courses
- **Price List** – Please [follow this link](#) to access our latest price list
- **Infovista Standard Commercial Terms** – Please [follow this link](#) to access all IV's commercial terms
- **Infovista Quality Charter** – Please [follow this link](#) to access IV's quality charter document
- **Infovista Hardware Support Terms and Conditions** – Please [follow this link](#) to access our global hardware support terms and condition

9.7 Glossary / KPIs

- **12 months rolling pipeline:** Open unweighted pipeline with a close date between today and next 365 days.
- **4RQ Forecast:** Four Rolling Quarter Forecast of the current quarter and the next three quarters.
- **4RQ unweighted pipeline:** Open unweighted pipeline with a close date between the current quarter and the next three quarters.
- **ACV Booking:** Annual Contract Value of order entry to be recognized.
- **ACV SaaS:** Total amount of SaaS product values over the normalized SaaS term.
- **Aged deals:** A deal is considered aged if older than 9 months regarding NT/RE and if older than 18 months for AA.
- **Backlog:** Deals already won (booked) but revenue has not yet been recognized.
- **Best Case Forecast:** Represents the sales management's Judgement/Forecast on the landing result based on major upside deals, not included in the "Management Forecast" but where the Regional Leader sees a real potential to close in the quarter and for which special attention will be needed.
- **Budget/Quota:** Fixed number to be achieved within the stated period and does not change during that period.
- **Commit:** Opportunities that have been committed to be closed during the stated period.
- **Deferred Revenue:** Revenue value of a contract that is deferred to be recognized, due to certain conditions of the contract. For example: In a Software contract that includes several modules and where one of the modules is not yet available, then that portion of revenue will only be recognized in the moment when that functionality is available and has been delivered to the customer.
- **Forecast To Go:** Forecast - Total closed won deals.

- **Forecast:** Is the individuals estimated value and identified deals you are committed to achieve and close within the stated period.
- **Magic quadrant:** Matrix with laid Account directors and the X axis = unweighted pipe coverage and Y axis = weighted pipe coverage.
- **Management Forecast:** Is the committed value (booking or revenue) to be achieved within the stated period at the Sales management level (Region, Territory).
- **Omitted:** This forecast category is being used on unqualified opportunities that are not included in your Pipeline.
- **Pipe coverage by AD:** unweighted pipe under the name of AD / Quota to go.
- **Pipe coverage inc. run-rates and backlog:** Open qualified pipe / Quota to go **inc.** backlog and historical run-rates (i.e., deals that came during the quarter).
- **Pipeline Coverage:** Open Qualified pipe / Quota to go. As a standard, we expect a coverage of 3X as a benchmark for all products.
- **Pipeline gap/surplus:** Complete analysis in which we determine how much of pipe gap or surplus do we have based on FYXX remaining target to go (inc. run-rates, backlog & YTD Closed Won info), the unweighted pipe for FYXX and the 3X standard.
- **Pipeline:** The total value (unweighted value) of qualified opportunities for a stated period, i.e., closing in the **future**. Pipeline from **SFDC:** Sum of unweighted value of all opportunities in stages: Value Positioning + Proposal Development + Negotiation + In-Buying Process.
- **Pull in:** Deals that originally had a close date in further quarters and were pulled to the current one.
- **Push out:** Deals that originally had a close date for the current quarter and were pushed to further quarters.
- **QA (%) based on Weighted Pipe:** (Closed won bookings + Weighted pipe over the remaining period) / quota.
- **QA (%) based on Won Bookings:** Closed won Bookings / quota.
- **Quarterly conversion rates:** We divide how much we've closed-won at the end of each fiscal quarter by their respective qualified starting pipe for the fiscal quarter.
- **Quota ToGo:** Quota - Total closed won deals.
- **Run-rates:** Deals opened and closed in the same quarter.
- **SaaS (Software as a Service):** The offering of Software bundle with a set of services and products (e.g.: hardware + maintenance + services + SW) and license the total solution for a fee/month during a period of time.
- **SaaS Term:** Term value of all SaaS products.
- **Slipped deals:** Deals that originally were in the forecast of a given quarter and moved to further forecasts.
- **Software/Hardware Maintenance Term:** The term value of all Software/Hardware Maintenance contracts.
- **Stalled deals:** Deals with no activity in the last 3 months that are older than 6 months.
- **Subscription:** License value of the Software license transformed into a license fee per month during a period of time
- **Upside:** Opportunities that should happen this quarter, but not certain yet.
- **Weighted Pipeline Coverage:** Weighted pipeline/ Quota to go. In the software industry, it is recommended that this value is higher than 1.2.
- **Weighted Pipeline:** The Sum of the weighted value of total opportunities (opportunity value multiplied by the win probability) for a certain period.
- **Worst Case Forecast:** It represents the sales Management judgement on landing result

based on major risks in deals, particularly when there are major outliers or risky opportunities included in the Management Forecast.

- **Yearly conversion rates:** We divide how much we've closed-won at the end of each fiscal year by their respective qualified starting pipe for the fiscal year.
- **YTD Forecast:** Closed Won of previous quarters + Forecast of Current Quarter (Example: In Q3: YTD Forecast = Closed Won (Q1+Q2) + Q3 Forecast).
- **YTD Quota:** Sum of the quotas of previous quarters + Quota of current quarter.

About Infovista

Infovista empowers CSPs and Enterprises to enhance network, service, and customer experience intelligence, driving efficiency, cost savings, and revenue acceleration. Trusted by 1,000+ customers worldwide, including 400 MNOs, we optimize, assure, and monetize mobile, fixed, and private networks.

Contacts:

Europe Headquarters

Telephone: +33 1 64 86 79 00
Email: info@infovista.com
Sales Enquiries:
sales-emea@infovista.com

Asia-Pacific Headquarters

Telephone: +971 4256 7101
Email: info@infovista.com
Sales Enquiries:
sales-apac@infovista.com

Americas Headquarters

Telephone: +1 855 323 5757
Email: info@infovista.com
Sales Enquiries:
sales-americas@infovista.com