CELENT

VendorMatch

Tutorial (Vendor Edition)

How to create, optimize and manage your VendorMatch profile & complete and leverage RFX

Here's our head of digital services to explain.

01 What is VendorMatch ?

02 Vendor inputs, data structure & protection of vendor information.

03 Creating & editing a company profile + completing the key-facts form.

04 Creating & editing solution profiles + categorizing.

05 Completing the VendorMatch Discovery questionnaire + RFX RFI.

06 RFX use cases and controlled release process.

07 Managing users.

08 Understanding PRO options.

09 Visitor analytics & audit trails

10 Adding & editing events, news, whitepapers.

HI, I'M CHRISTIAN, I AM GOING TO EXPLAIN EVERYTHING YOU NEED TO KNOW ABOUT VENDORMATCH, INCLUDING THE POTENTIAL TO REACH PROSPECTS LOOKING FOR SOLUTIONS AND HOW YOU CAN SHARE INFORMATION MORE EFFICIENTLY.


PART 1
What is VendorMatch ?
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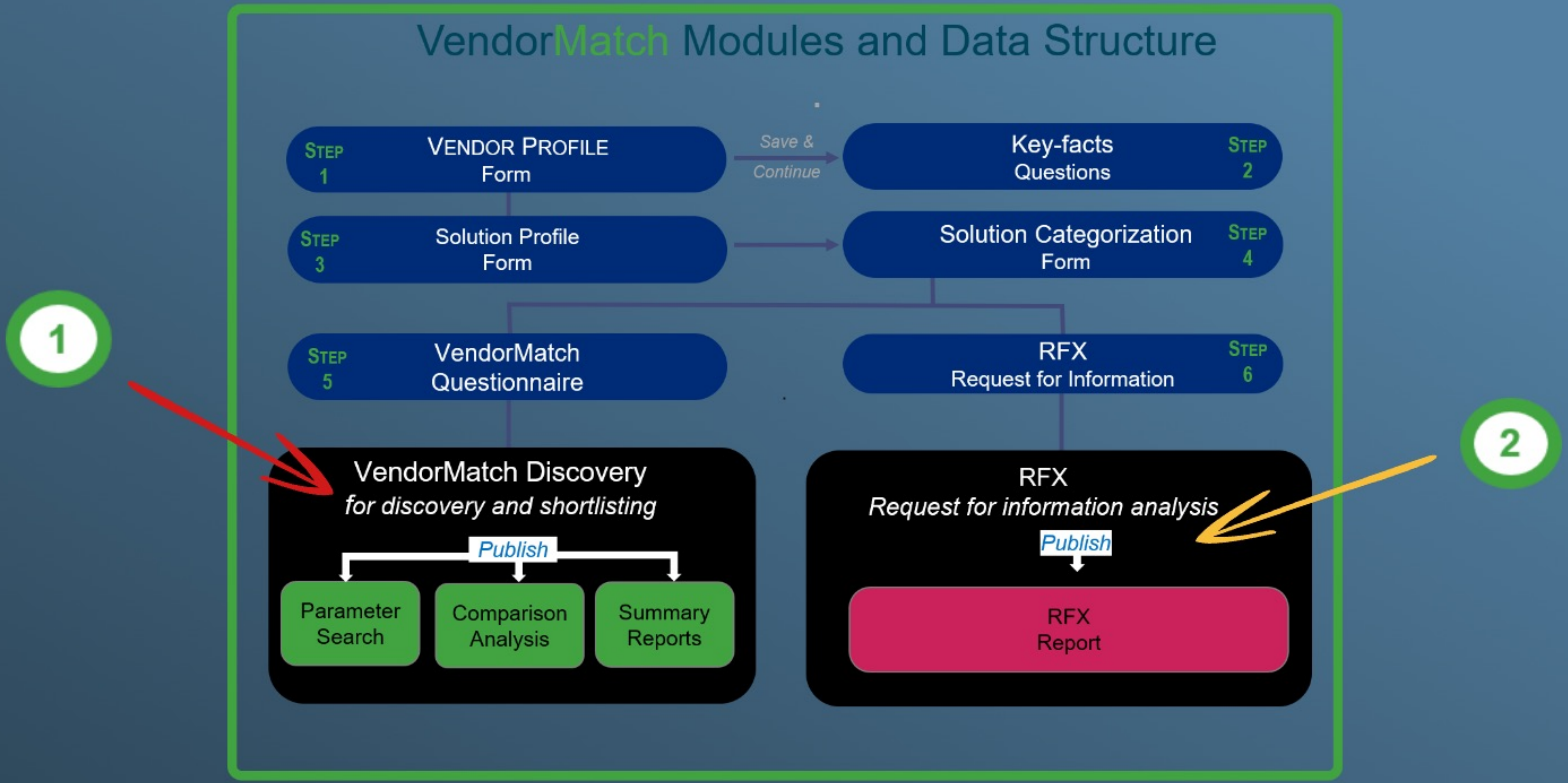
Vendormatch explained

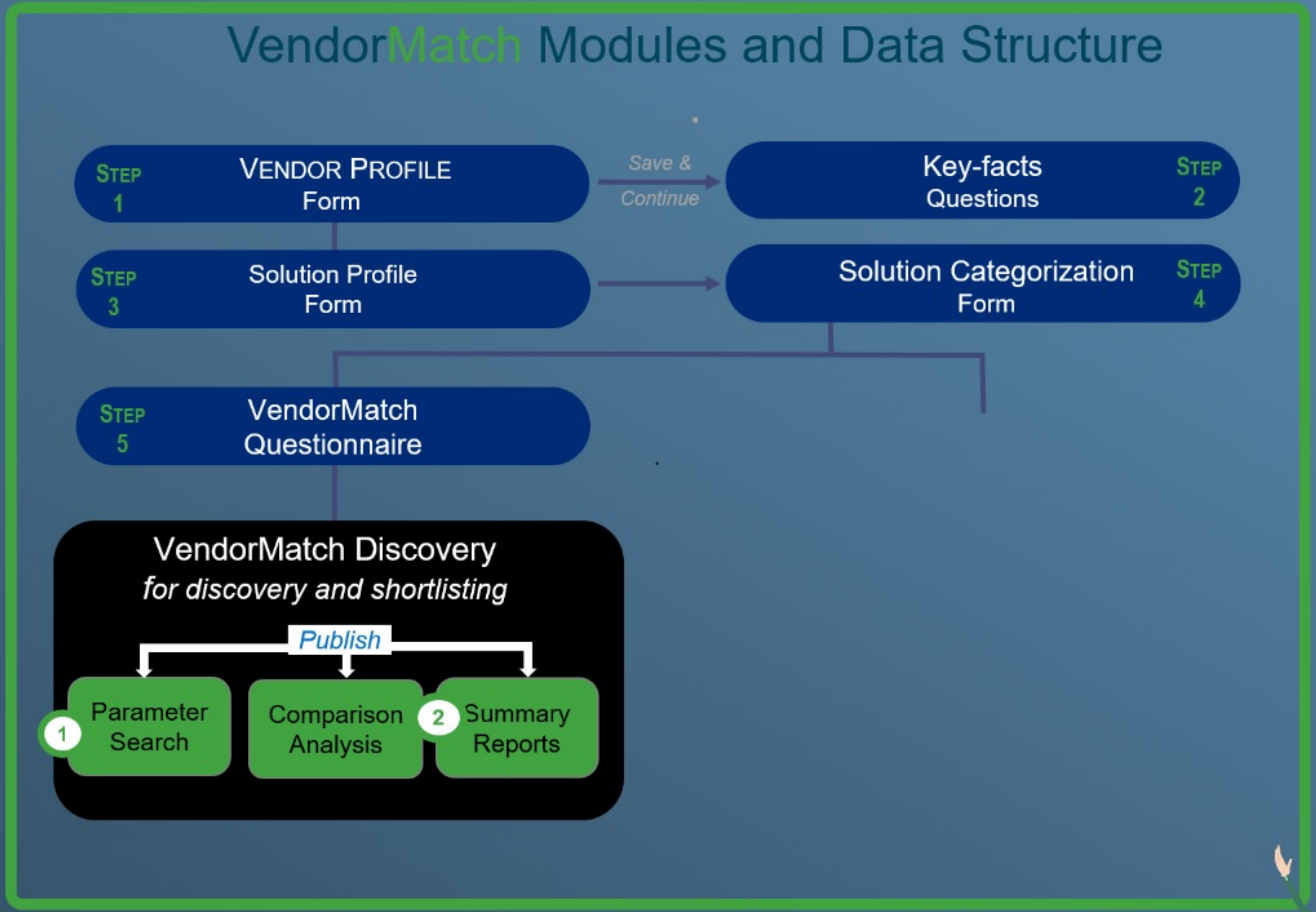


VENDORMATCH HELPS FINANCIAL INSTITUTIONS MAKE BETTER BUYING DECISIONS, FASTER.
THERE ARE TWO KEY ELEMENTS 1. VENDORMATCH DISCOVERY AND 2. RFX.

VendorMatch Discovery explained

1. Supporting market practitioners find solutions that match a given set of parameters. (The long-list)

2. Subscribers can use profiles, reports and comparison analysis to detmine suitability. (The short-list)



VendorMatch Discovery is our market scoping, solution discovery and short-listing tool.

RFX Explained

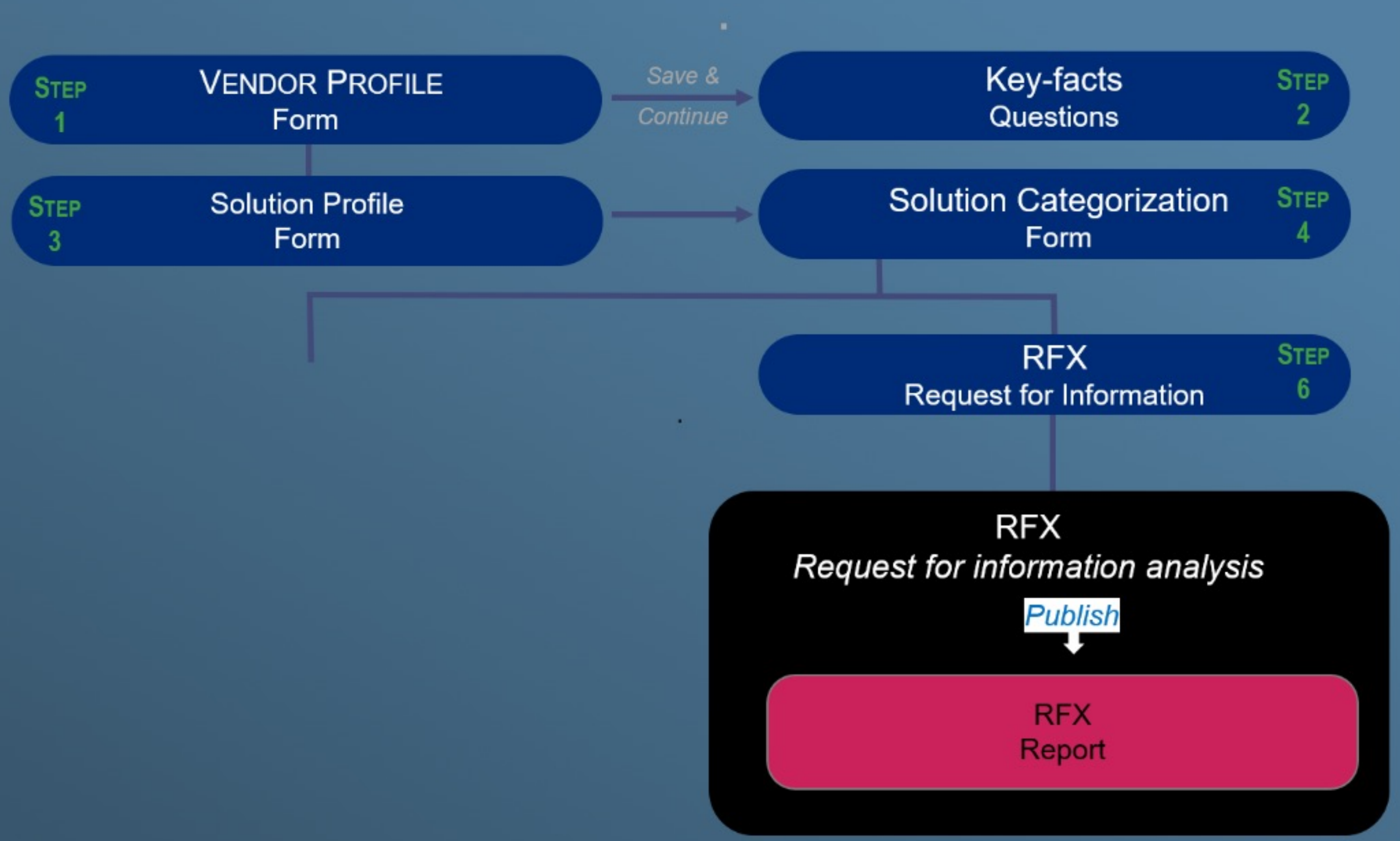
Use Cases

Used by a financial institution to evaluate a providers' solution.

Completed by a vendor and used proactively as part of a request for proposal (RFP) response.

Completed by a service provider and sent to their client(s) in lieu of completing one or multiple proprietary questionnaires.

VendorMatch Modules and Data Structure



RFX is our secure facility for storing, updating and sharing precompleted responses to RFIs authored by Celent's analysts.

End-user features and functionality

DISCOVERY PHASE

VendorMatch Discovery + RFX

1 Parameter Search

Use the VendorMatch discovery tool to identify solutions by category, then apply filters to determine which solution best meet your parameters.

2 Vendor Profiles

Cut though the noise and quickly get informed about vendors and their solutions. Use links to contact the right people at the vendor.

3 Summary Reports

Financial institutions and advisers can subscribe to obtain access summary reports providing a succinct report on the vendor, and a solution.

4 Project Manager

Create projects and invite colleagues to collaborate. Track and mange an evaluation and auto generate project status reports.

5 Compare

Add solutions to a project and then use our comparison feature to generate a comparison grid which can be exported to xls.

6 RFX Reports

Library of complete RFIs. Available for vendors to share with finical institutions and legitimate consultants on a request basis.

7 Expert Opinion

Subscribers can tap into our analyst network for advice on vendors and solutions,

FINANCIAL INSTITUTIONS SUBSCRIBING TO DISCOVERY HAVE ACCESS TO HIGH-LEVEL DATA AND SHORT-LISTING TOOLS.
RFX ADDS RFI LEVEL DATA AND ADVICE.

Key benefits of VendorMatch for Vendors

08 Use visitor analytics to generate leads for sales to follow up

01 Ensure you are found by genuine buyers who are early in the buying cycle and scoping the market for solutions.

07 Strong SEO drives further enquiries on our platform.

02 Showcase your full portfolio of solutions – incumbent vendors often get overlooked because buyers are unaware.

06 Learn about market trends and feed this information into your product and marketing strategies.

03 Tap into our 20,000 strong user base of financial IT professionals

05 Complete our RFX surveys and choose when to share comprehensive RFI information with institutions and their advisers saving time and effort.

04 Get enquiries from prospects who have used our platform to prequalify your match to their requirements.

VendorMatch benefits vendors by introducing and connecting you with buyers who have a qualified interest in one of your solutions and helps you share information more efficiently.


PART 2
Vendor inputs, data structure & protection of information
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Input purpose and estimated effort

1 For creating your company profile page for display in VM. Data will be pulled into reports.
0h30m

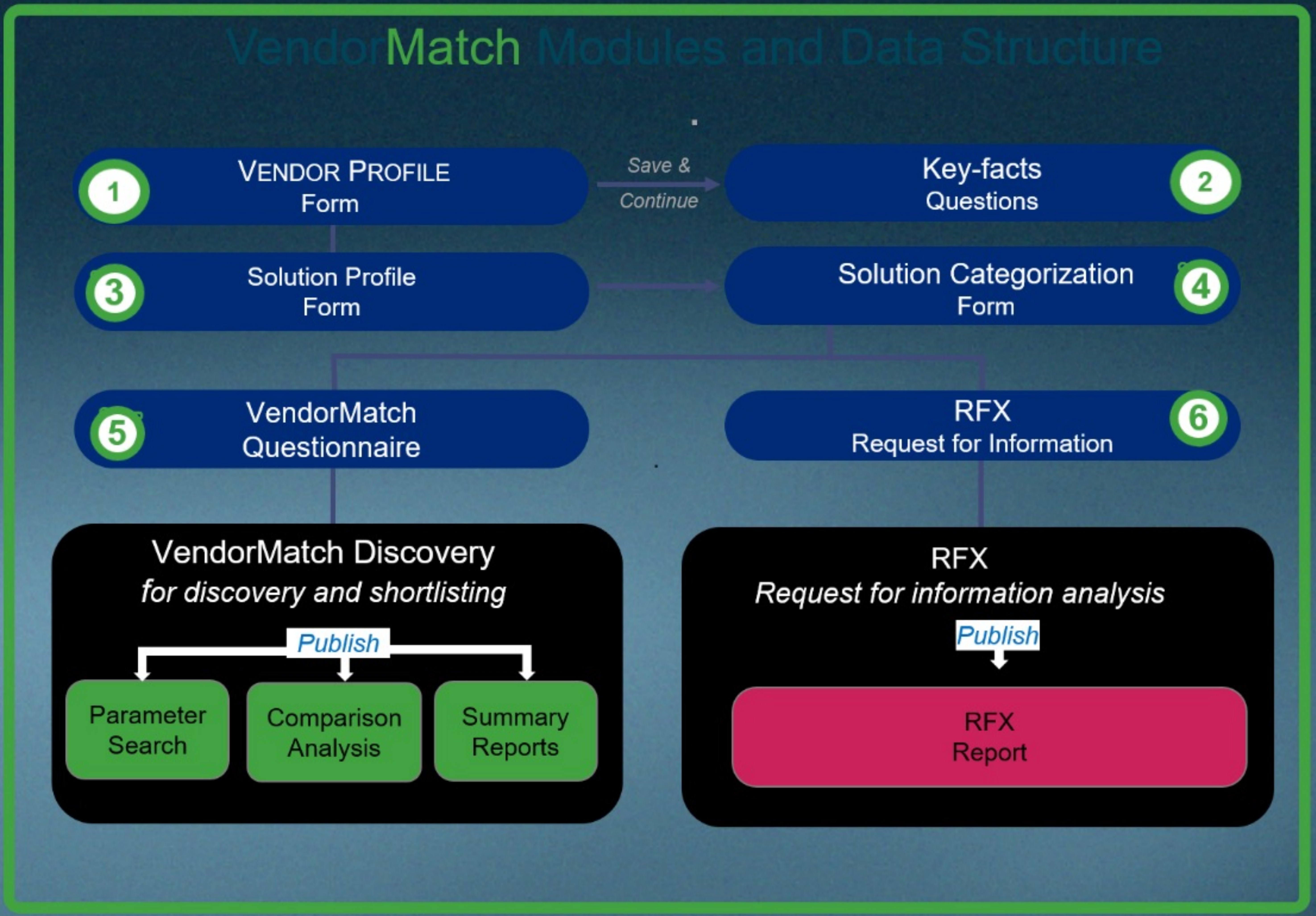
2 Asks about your company structure and credentials like turnover etc for reports.
0h10m

3 For creating your solution profile in display in VM. Data will be pulled into reports.
0h30m

4 Use this form to categorize / classify your solution type. What you select here drives the questionnaire sections in VM Discovery & RFX.
0h5m

5 The VendorMatch Discovery questionnaire drives the search filters and helps users determine the match between your solution's capabilities with a buyers needs.
0h20m

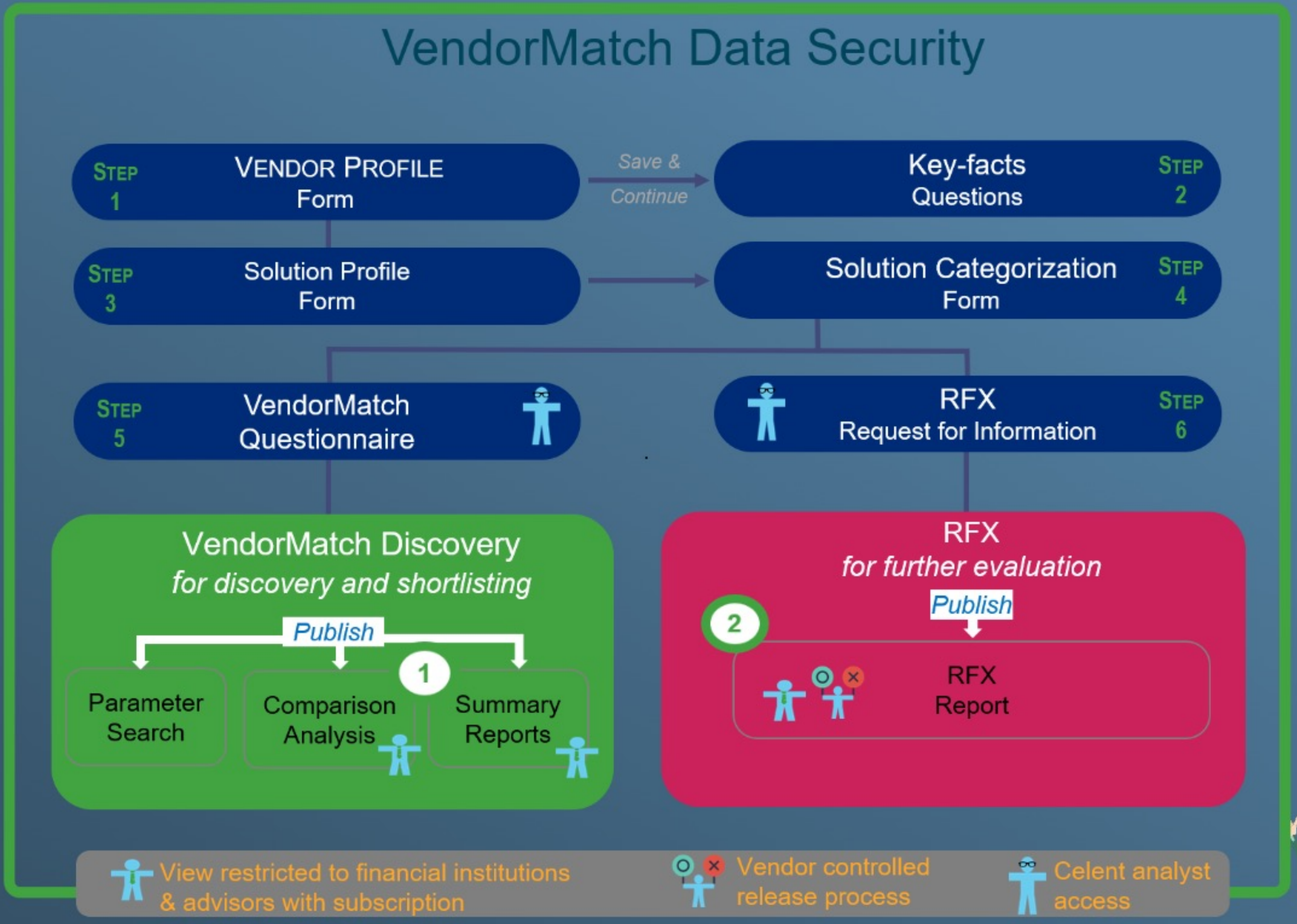
6 The RFX RFI is your golden-copy RFI response driving our research and for you to share with buyers as you wish.
2h30m



Protecting sensitive vendor data

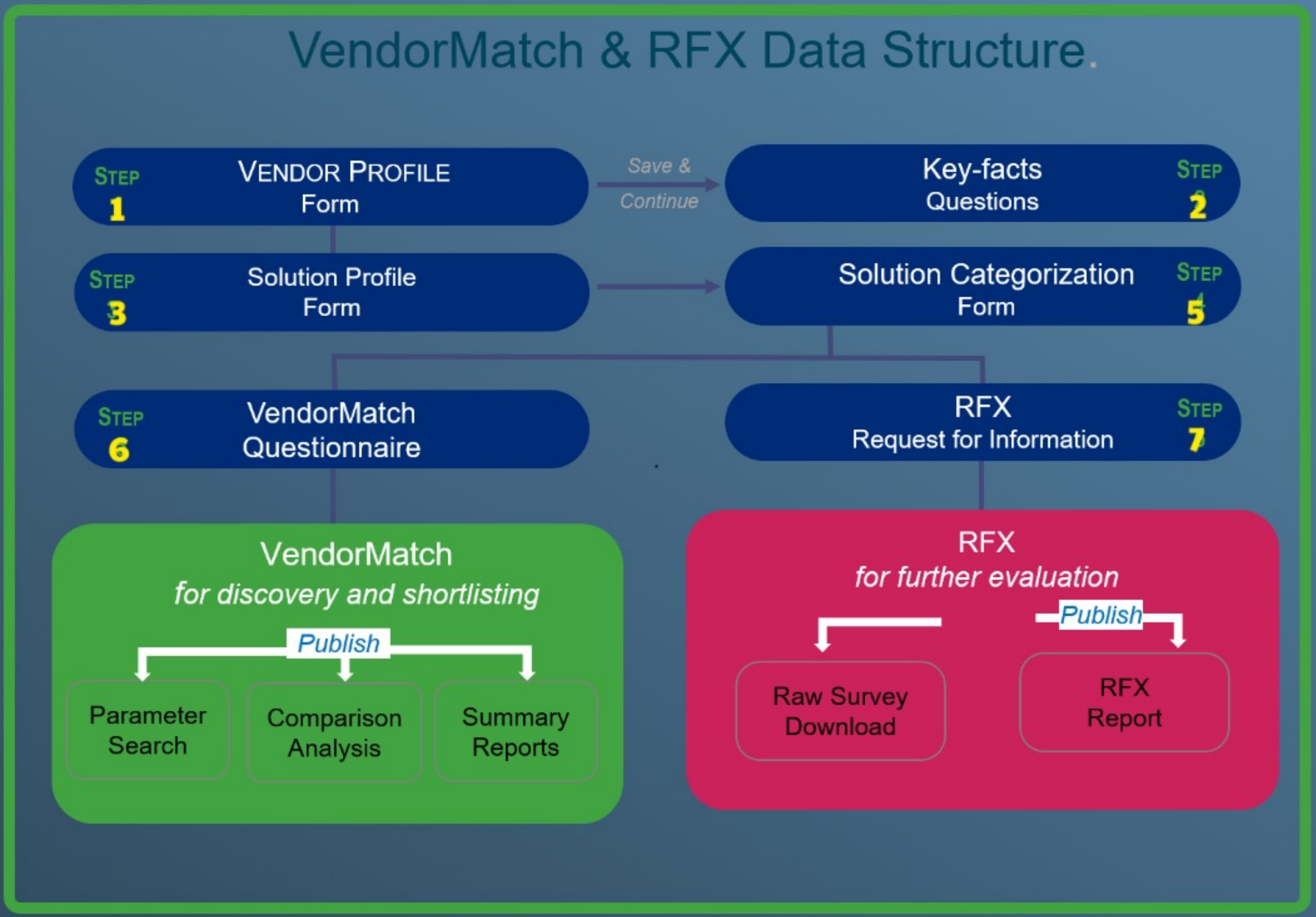
1. Comparison analysis and summary reports are only available to FIs and their advisers.

2. RFX access offers an additional level of protection – access requires authorization from the vendor on a case by case basis.



ONLY SUBSCRIBING FINANCIAL INSTITUTIONS AND ADVISERS HAVE ACCESS TO SENSITIVE INFORMATION AND ARE BOUND BY OUR TERMS OF USE WHICH INCLUDE NDA TYPE CLAUSES.

Order of work



4 Invite colleagues to work collaboratively – see user mgmt secton.

Complete your profile in this order


PART 3
Creating & editing your company profile & the key-facts form.
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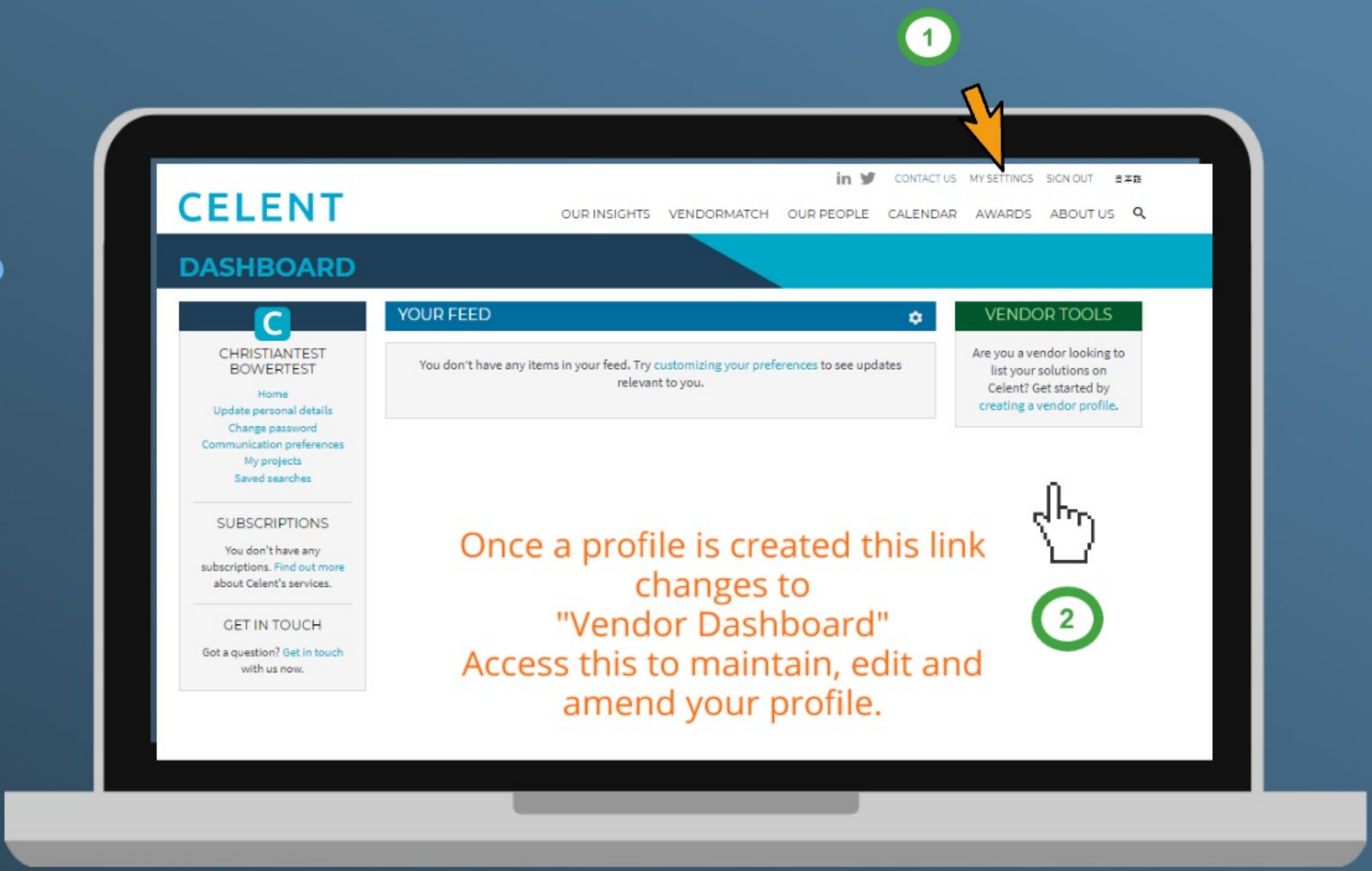
Locating the vendor dashboard

1 Go to My settings located in the top menu bar.

2 click "create a vendor profile"

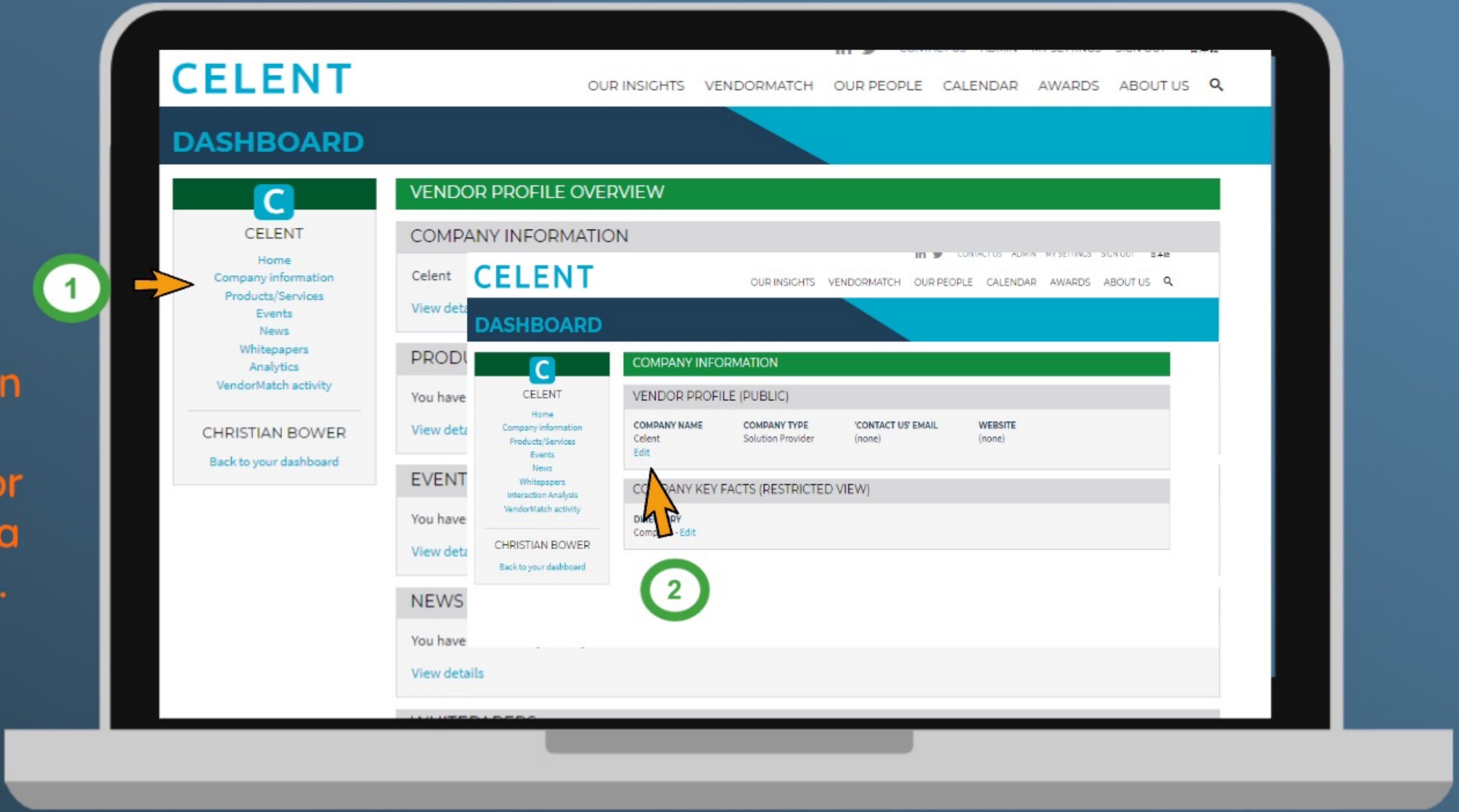


THE VENDOR DASHBOARD IS YOUR CONTROL CENTER FOR CREATING, EDITING AND MANAGING YOUR VENDOR PROFILE AND ACCOUNT.

Locating the company profile form.

1 Click Company Information

2 In the next screen click "add" to create or "edit" to amend a company profile.



The Company Profile Form powers your public company page from which everything else, like solutions, news, events, whitepapers is connected.

Complete the company profile form.

Part 3.
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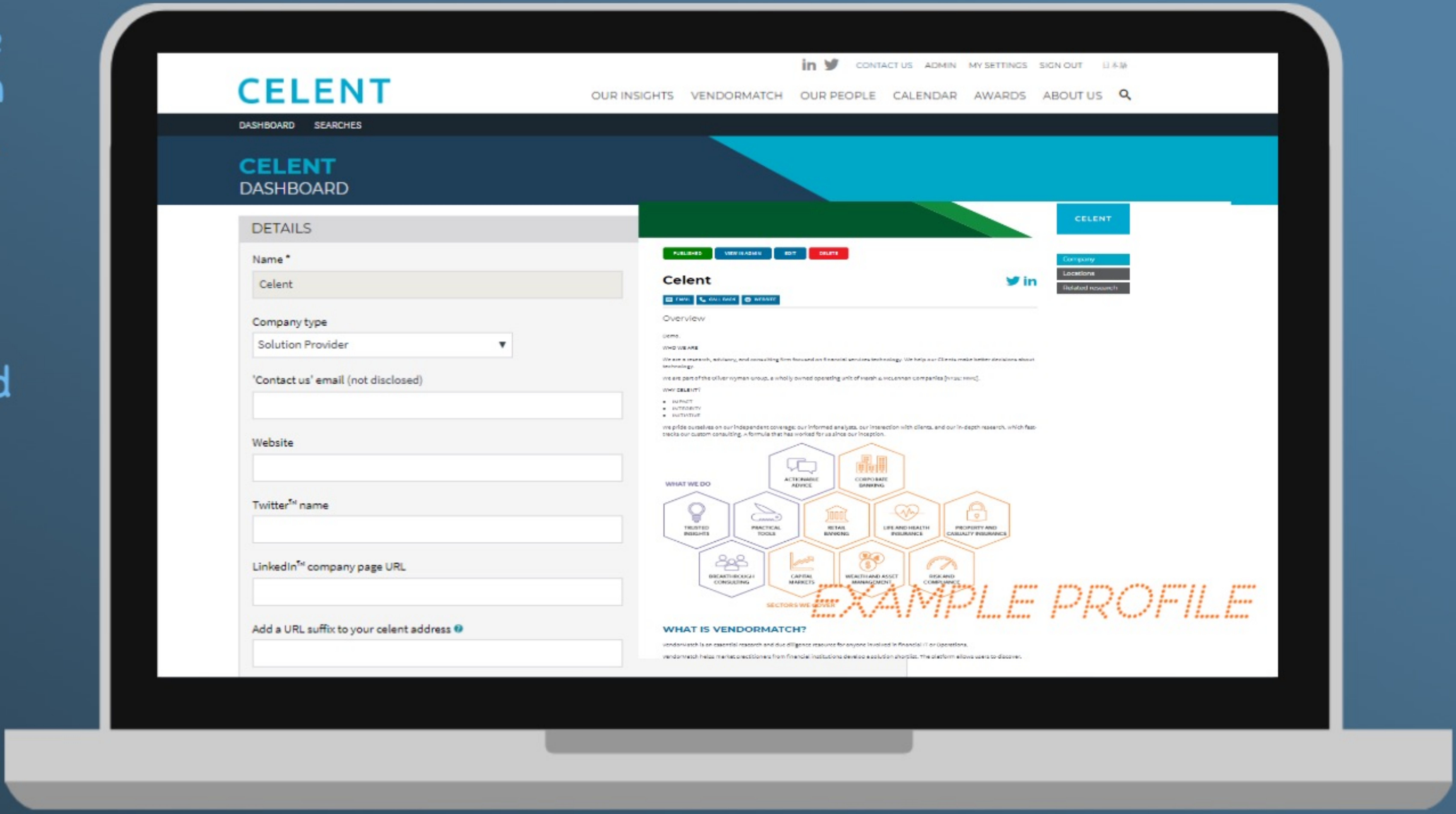
Co profile

Thoroughly complete the form to ensure an enticing profile page.

Save regularly as timeout is set to 30 minutes inactivity and resting on a page is inactivity.

Add media such as corporate reports.

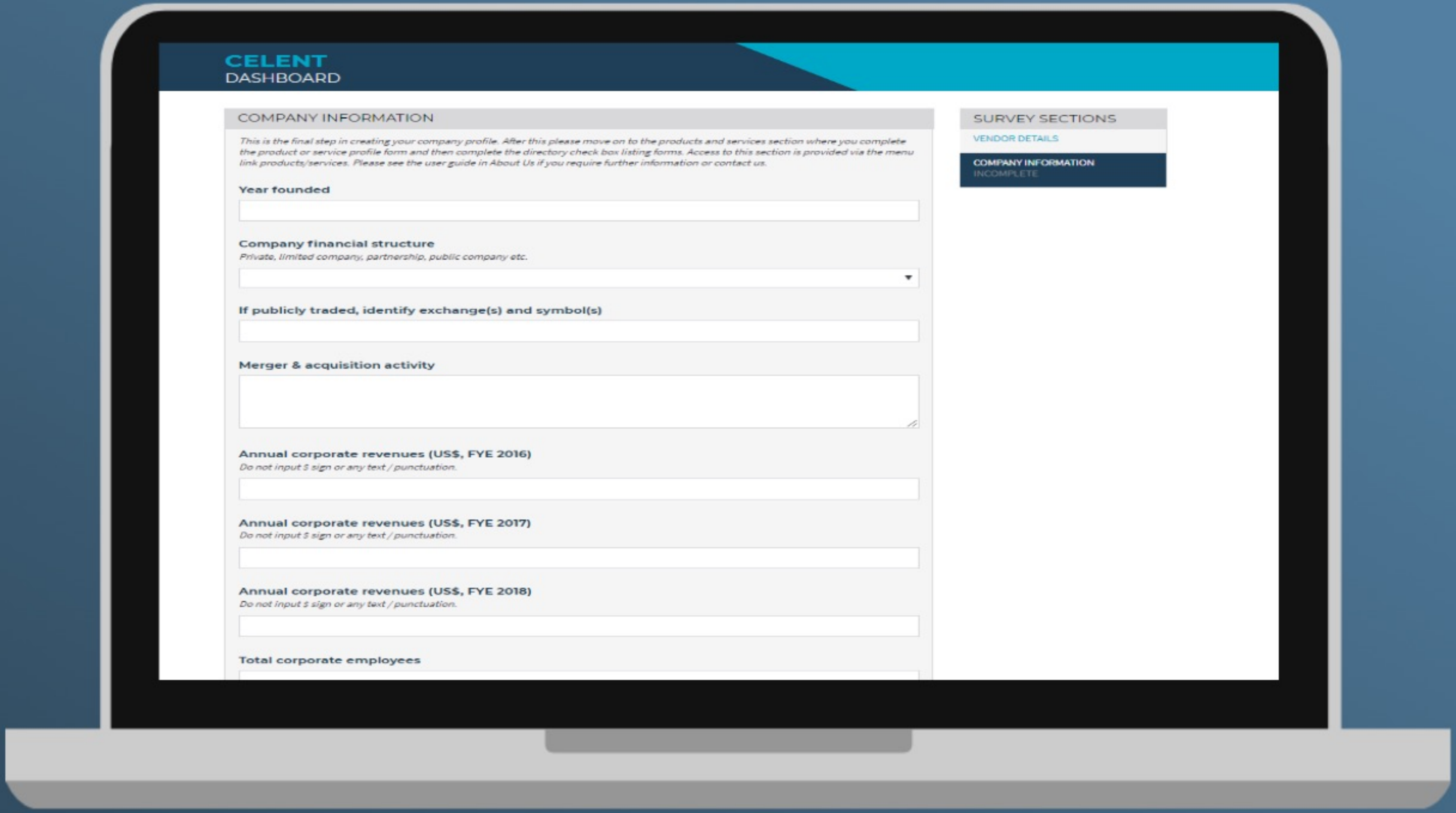


Your company profile page is a public page accessible through VendorMatch Discovery.
Profile information is pulled into the summary report and RFX Report.

Complete the company key-facts form

Click "save & continue" to progress to the company key-facts survey.

Enter the key-facts data about your company. This will only show in reports.



Access the key-facts form anytime via the company information page.


PART 4
Creating & editing your solution profile
& categorizing / classifying solution type correctly.
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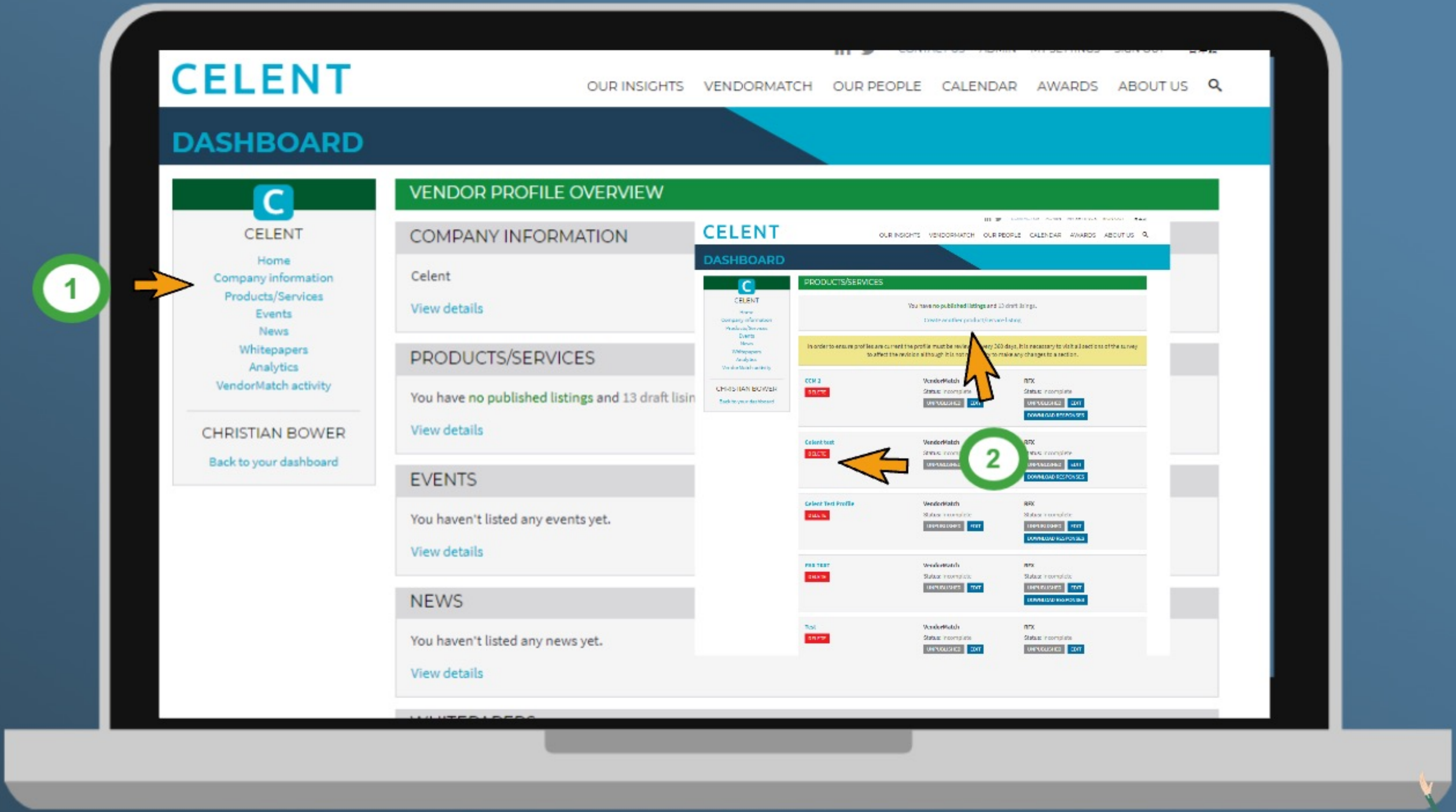
Locate the solution profile form.

1. Click products / services

2. In the next screen click "creat a new product / service" or "edit an existing solution"

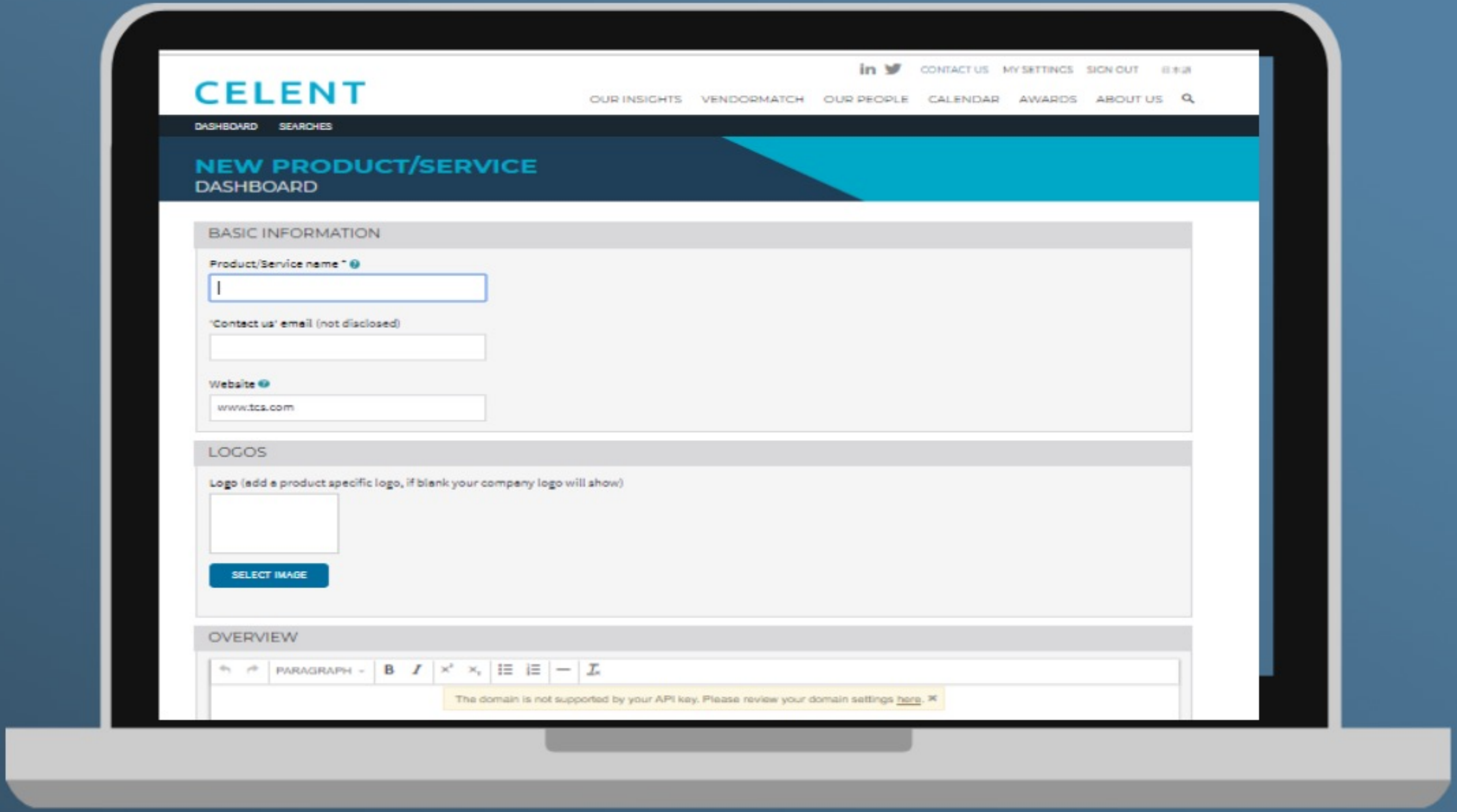


Access the product / services management page anytime to make changes to your solution profile page.

Complete the solutions profile form.

Complete all the sections. Include media such as product brochures or demonstration videos.

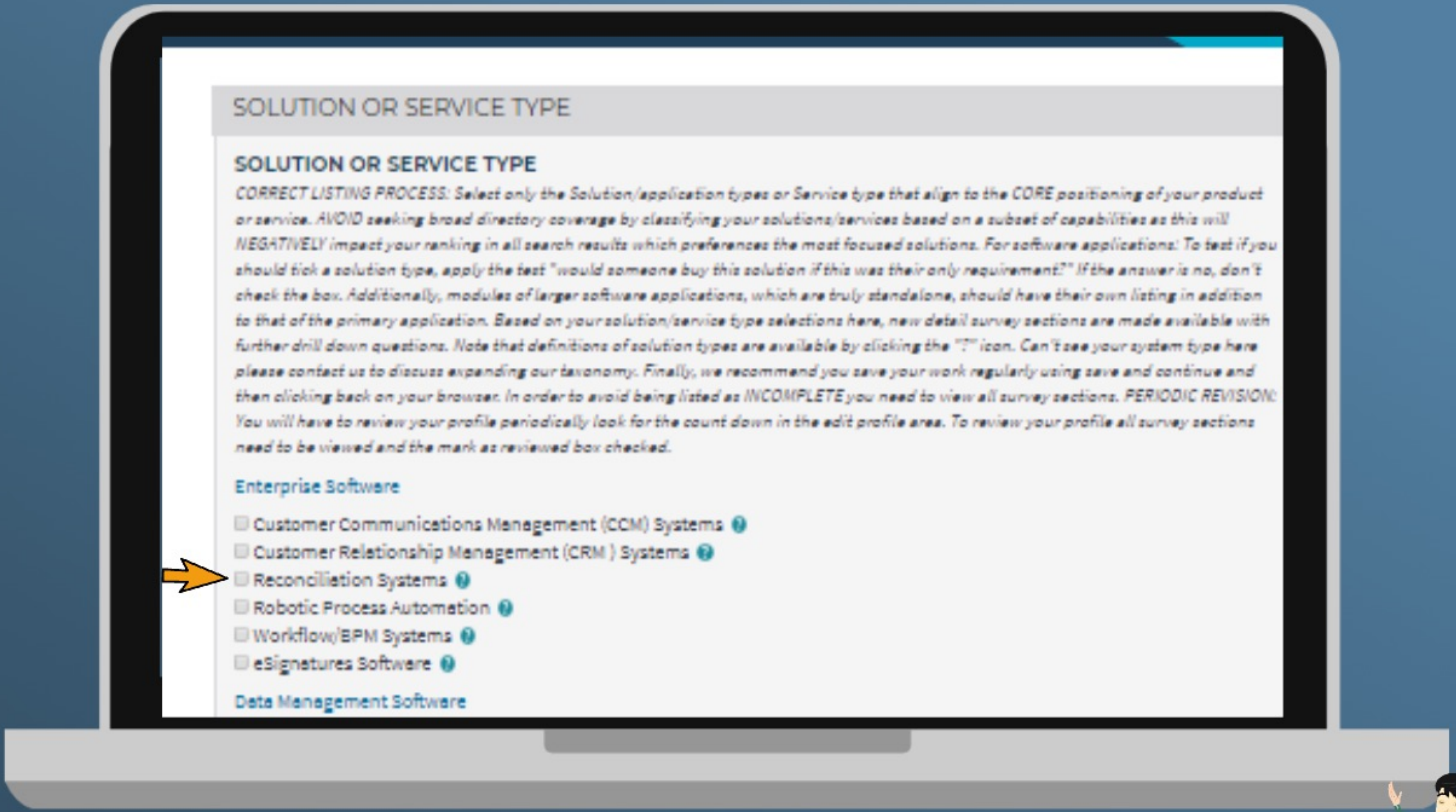
Then click "save and continue" to go to the solution type categorization / classification form.



This is Your public page showcasing your solution in VendorMatch Discovery, the profile form information also show in reports.

Categorizing & classifying your solution type.

Select the solution type(s) that best define your offering.



SOLUTION OR SERVICE TYPE

SOLUTION OR SERVICE TYPE

CORRECT LISTING PROCESS: Select only the Solution/application types or Service type that align to the CORE positioning of your product or service. AVOID seeking broad directory coverage by classifying your solutions/services based on a subset of capabilities as this will NEGATIVELY impact your ranking in all search results which preferences the most focused solutions. For software applications: To test if you should tick a solution type, apply the test "would someone buy this solution if this was their only requirement?" If the answer is no, don't check the box. Additionally, modules of larger software applications, which are truly standalone, should have their own listing in addition to that of the primary application. Based on your solution/service type selections here, new detail survey sections are made available with further drill down questions. Note that definitions of solution types are available by clicking the "?" icon. Can't see your system type here please contact us to discuss expanding our taxonomy. Finally, we recommend you save your work regularly using save and continue and then clicking back on your browser. In order to avoid being listed as INCOMPLETE you need to view all survey sections. PERIODIC REVISION: You will have to review your profile periodically look for the count down in the edit profile area. To review your profile all survey sections need to be viewed and the mark as reviewed box checked.

Enterprise Software

- [ ] Customer Communications Management (CCM) Systems
- [ ] Customer Relationship Management (CRM) Systems
- [ ] Reconciliation Systems
- [ ] Robotic Process Automation
- [ ] Workflow/BPM Systems
- [ ] eSignatures Software

Data Management Software

Categorizing / Classifying your solution type correctly is key to strong lead generation and ensuring the questionnaire and RFIs are applicable to the solution your are uploading.

How To maximize your sales opportunities

Part 4
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Categorization

Q. How do I optimize my profile for generating leads ?

A. You need to rank high in search as this drives the number of profile views and that's where opportunity arises.

How to optimize ranking

Q. OK, WHAT SHOULD I DO TO OPTIMIZE MY RANKING ?

A. SOLUTIONS WHICH ARE BROADLY CATEGORIZED USUALLY PERFORM LESS WELL IN SEARCHES THAN SOLUTIONS THAT ARE MORE FOCUSED.

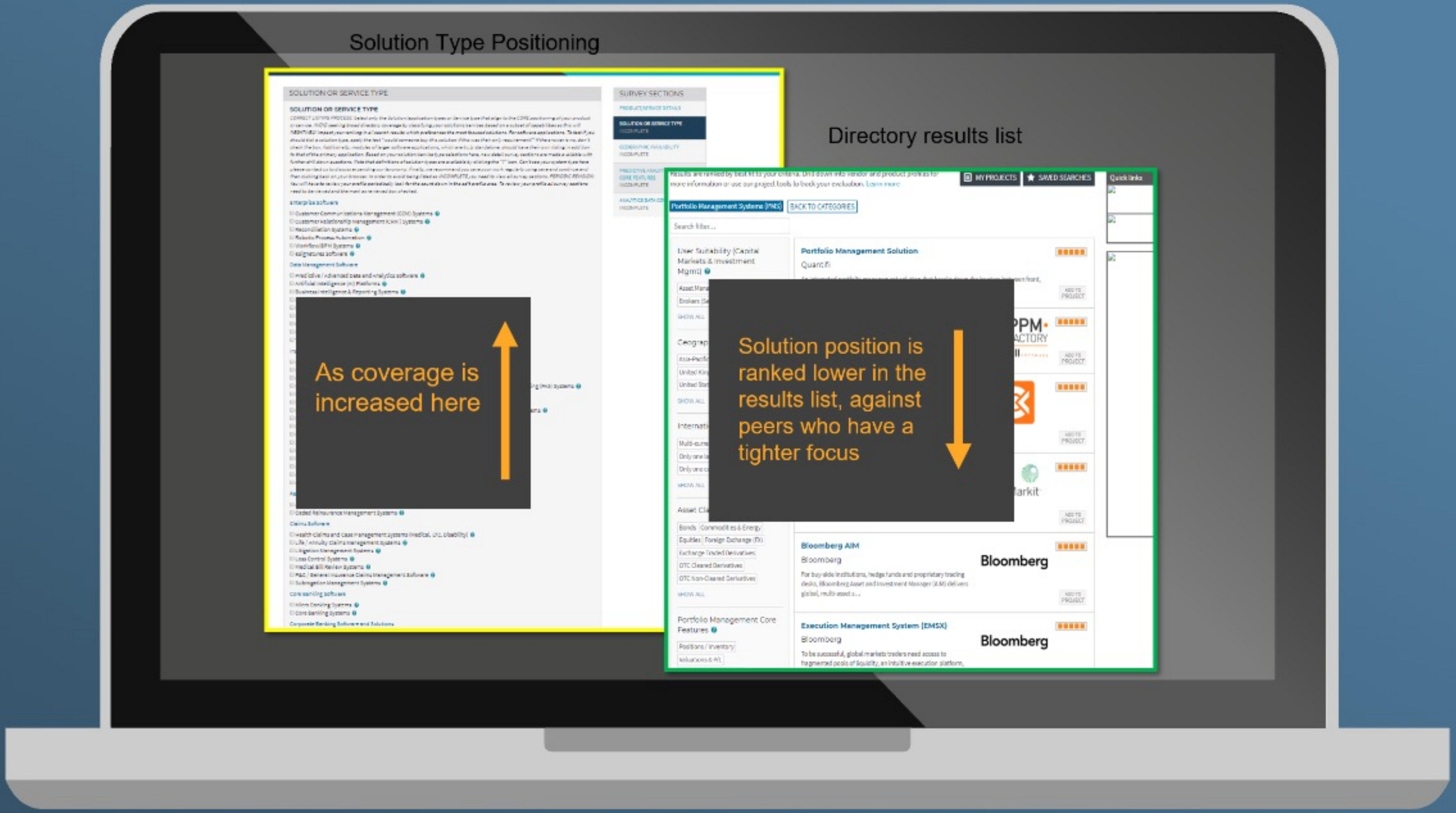
THIS IS EXPLAINED BY THE FACT THAT USERS USUALLY SEARCH FOR SOLUTIONS THAT MATCH ONE CATEGORIZATION ONLY AND CELENT'S SEARCH ALGORITHM CONSIDERS EXCESS FUNCTIONAL COVERAGE TO BE DETRIMENTAL TO THE USER.

Categorizing / classifying software types

For proper placement of software applications, apply the test:

"would someone buy this solution if this was their only requirement?"

If the answer is no, don't check the box.



Modules of larger software applications, which are truly standalone, should have their own listing in addition to that of the primary application.

Why has my solution been unpublished ?

1. Categorized in too many sections; this hurts your ranking & we want to help you get the most out of the platform .

2. Categorized across types that are too distinct serving different target markets or are of different scale ie. enterprise Vs best of breed

3. You've tagged consulting, outsourcing or services and technology categories for the same solution. These categories are not for implementing your own software.

4. Feature tagging, where the supplier of a larger solution is using the solution types categorization to describe the functionality in their system.

DON'T WORRY, OUR ANALYSTS ARE HERE TO HELP FIX THE ISSUES AND GET YOU TO POINT WHERE YOU CAN REPUBLISH.
YOU CAN SELF FIX TOO - THESE ARE COMMON ISSUES WE SEE - JUST AMEND AND REPUBLISH

PART 5

Completing & editing the VendorMatch Discovery Questionnaire and RFX Request for Information

Locate & edit the VendorMatch Discovery Questionnaire

Part 5.
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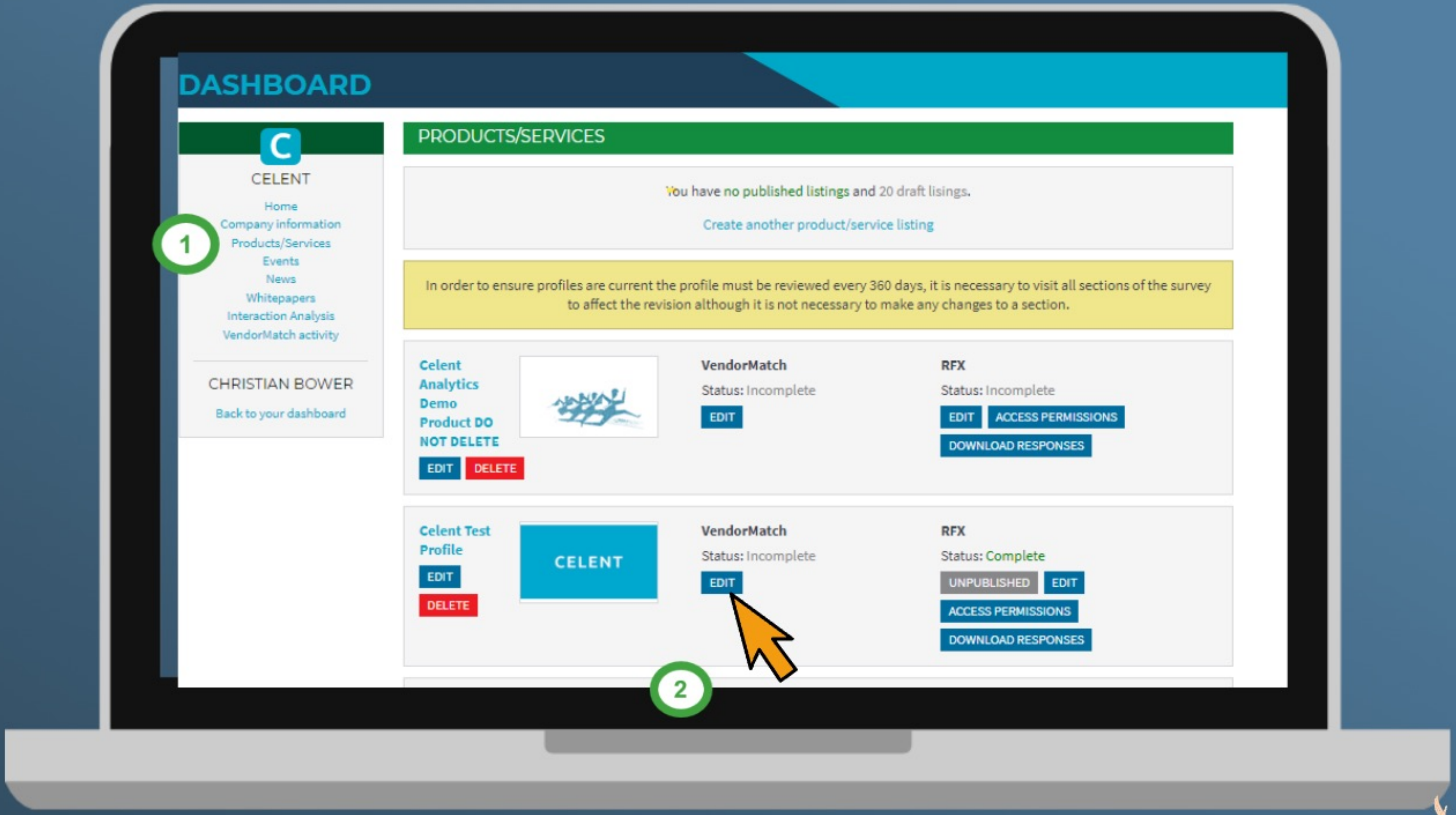
Questions

1 Find products / services in the menu and click

2 Now find the VendorMatch Discovery questionnaire and click edit



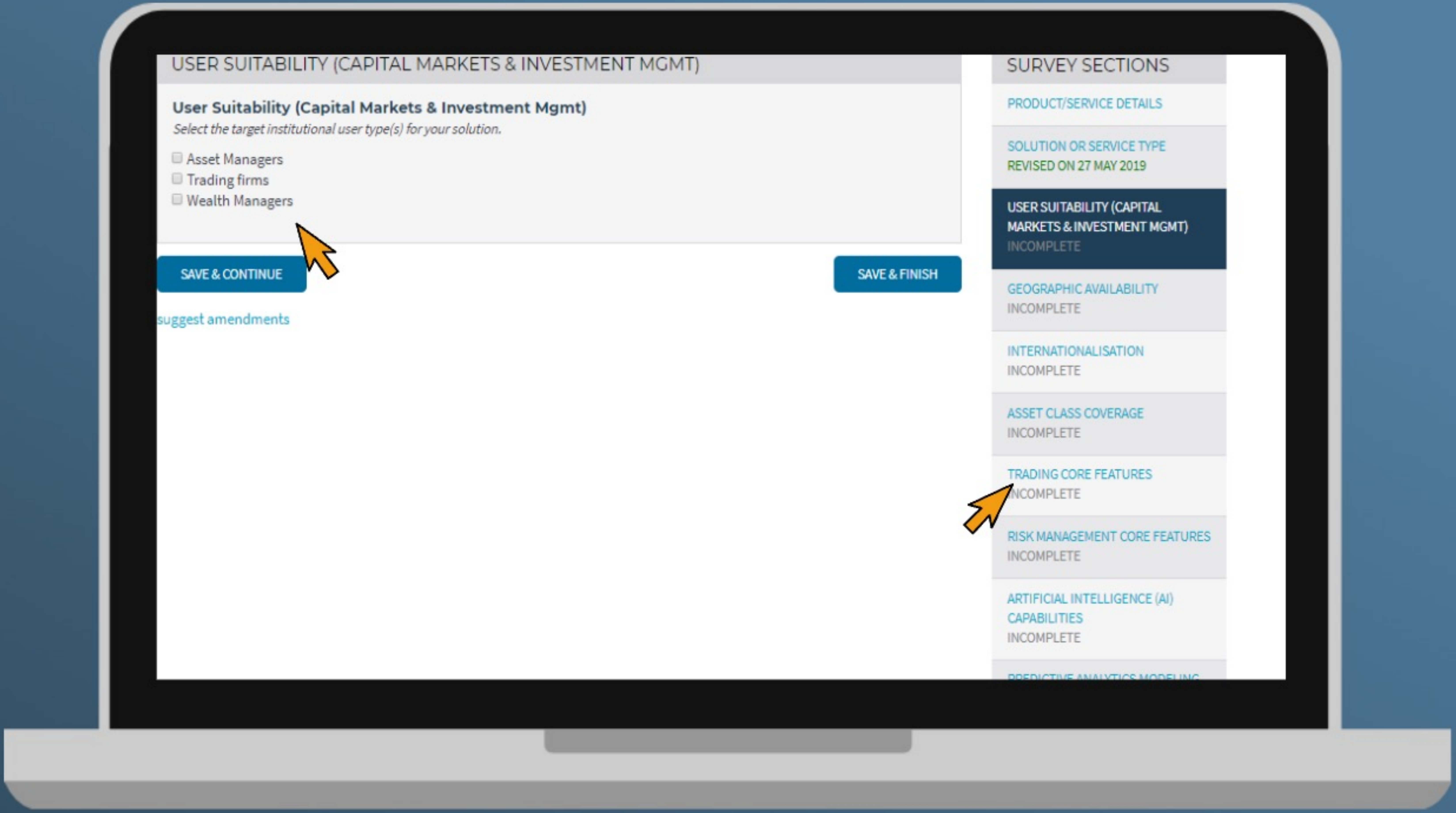
Having categorized your solution (as this drives the questions data structure) proceed to the VendorMatch Discovery questionnaire. You can amend / update at anytime using the edit link.

Complete the VendorMatch questions

Part 5. CELENT Questions

You can move on by clicking save & continue or if you can't complete a section which requires a positive response just click on the sections column (right) to proceed.

Save regularly to avoid timing out.

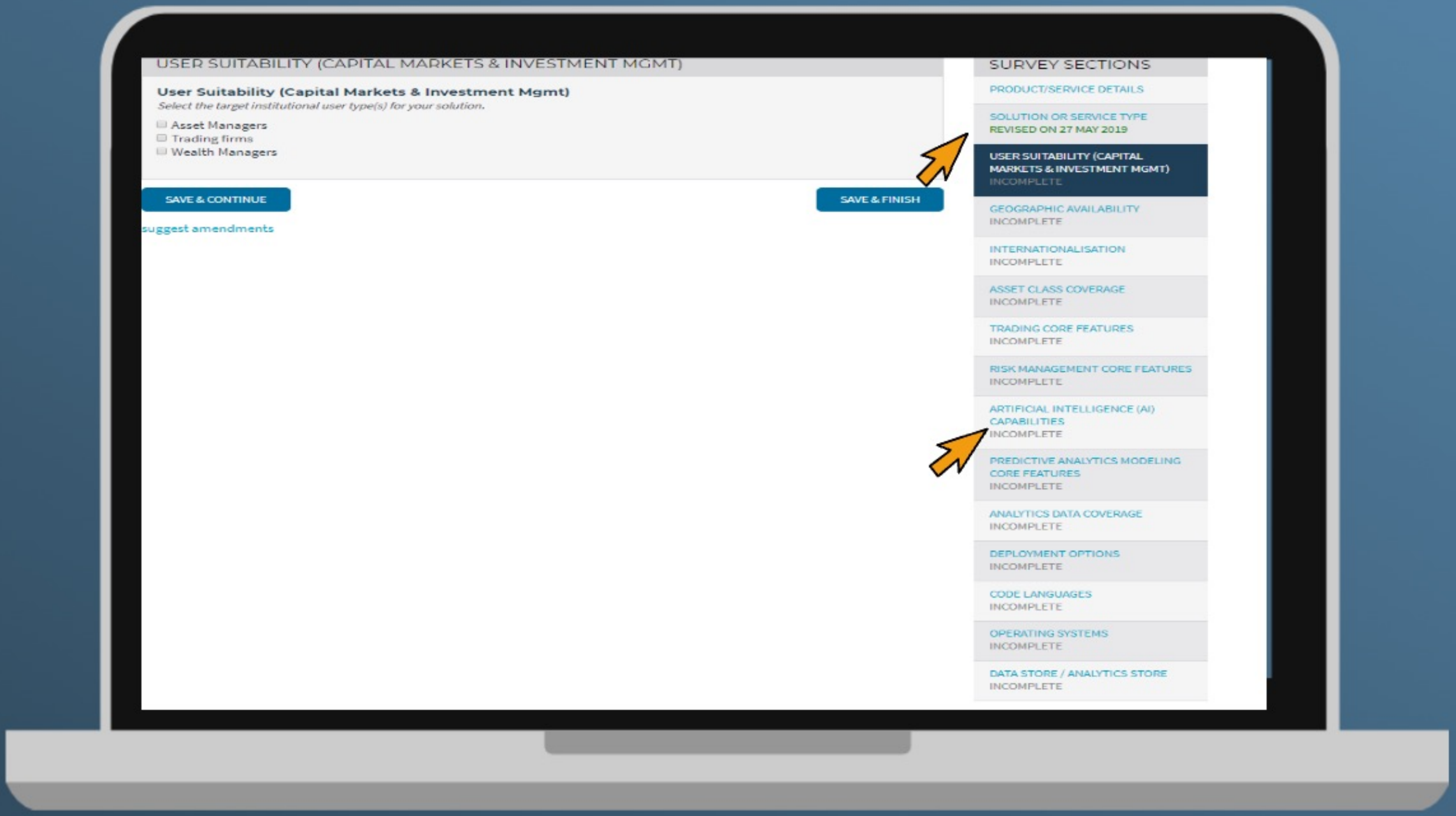


VendorMatch Discovery question are checkbox or Yes/No drop-downs - they drive the filters in the results page and show in the Summary and comparison Reports.

Status of each section is shown here

STATUS LEVELS:

- Incomplete
- Complete
- Questions updated



You can check the response status of any question section from within the questionnaire itself.

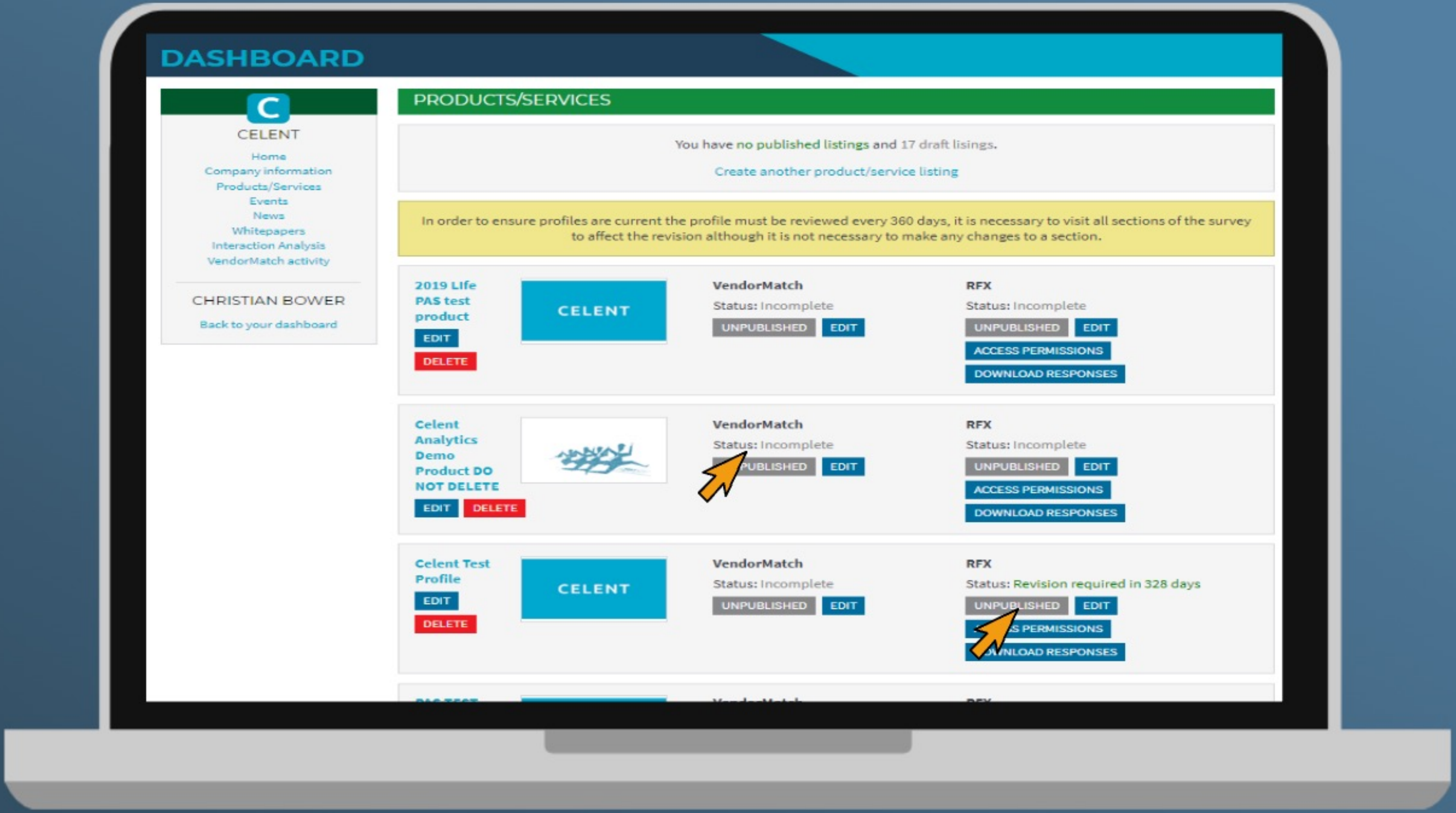
Response and listing status

STATUS LEVELS:

Incomplete

Complete
(will show time to expiry - watch for email alerts)

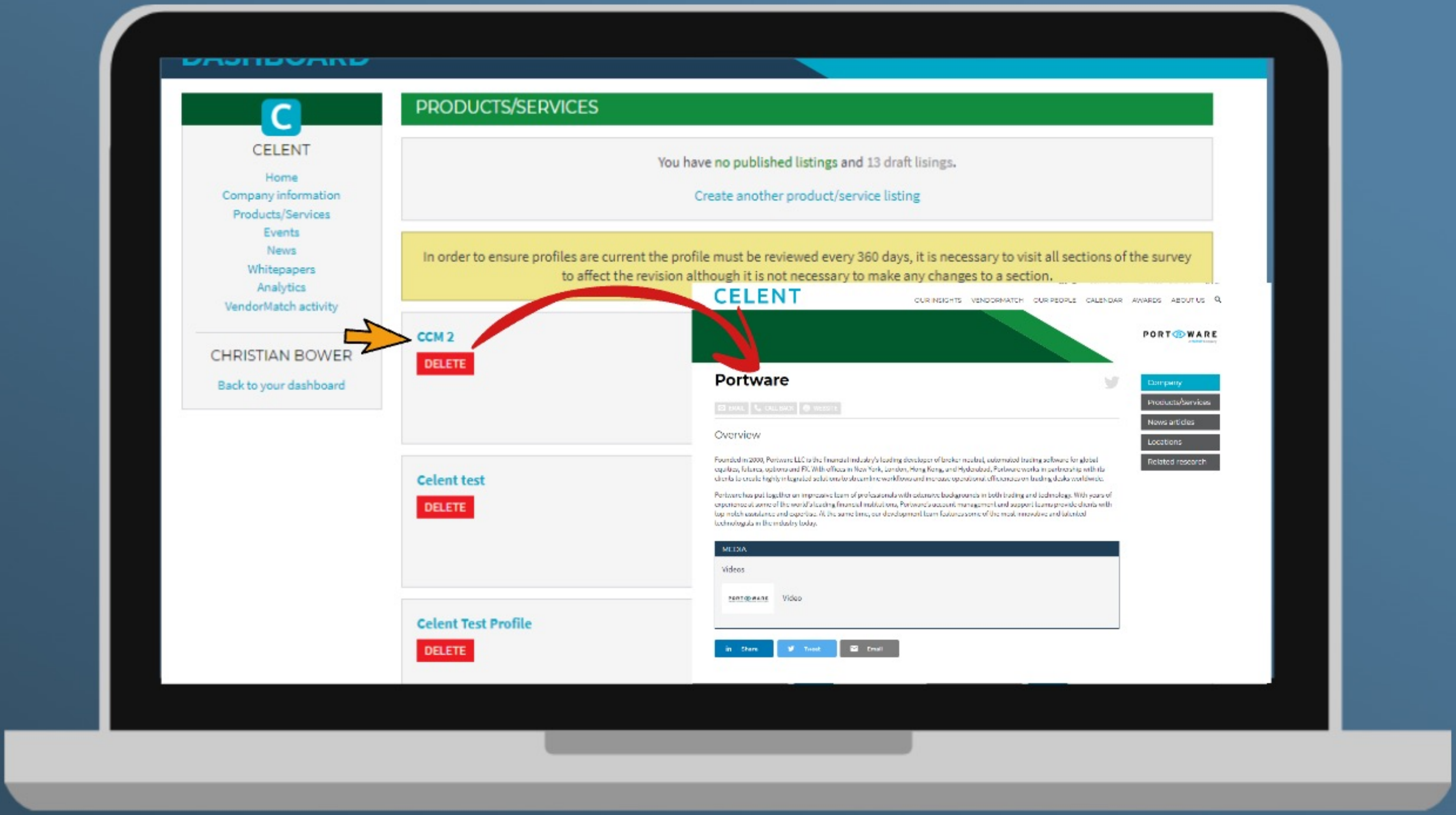
Question updated
(remains active)



Note that you can only publish a solution that is complete.

Take a moment to vist your profile

Click the solution name to see your live profile.



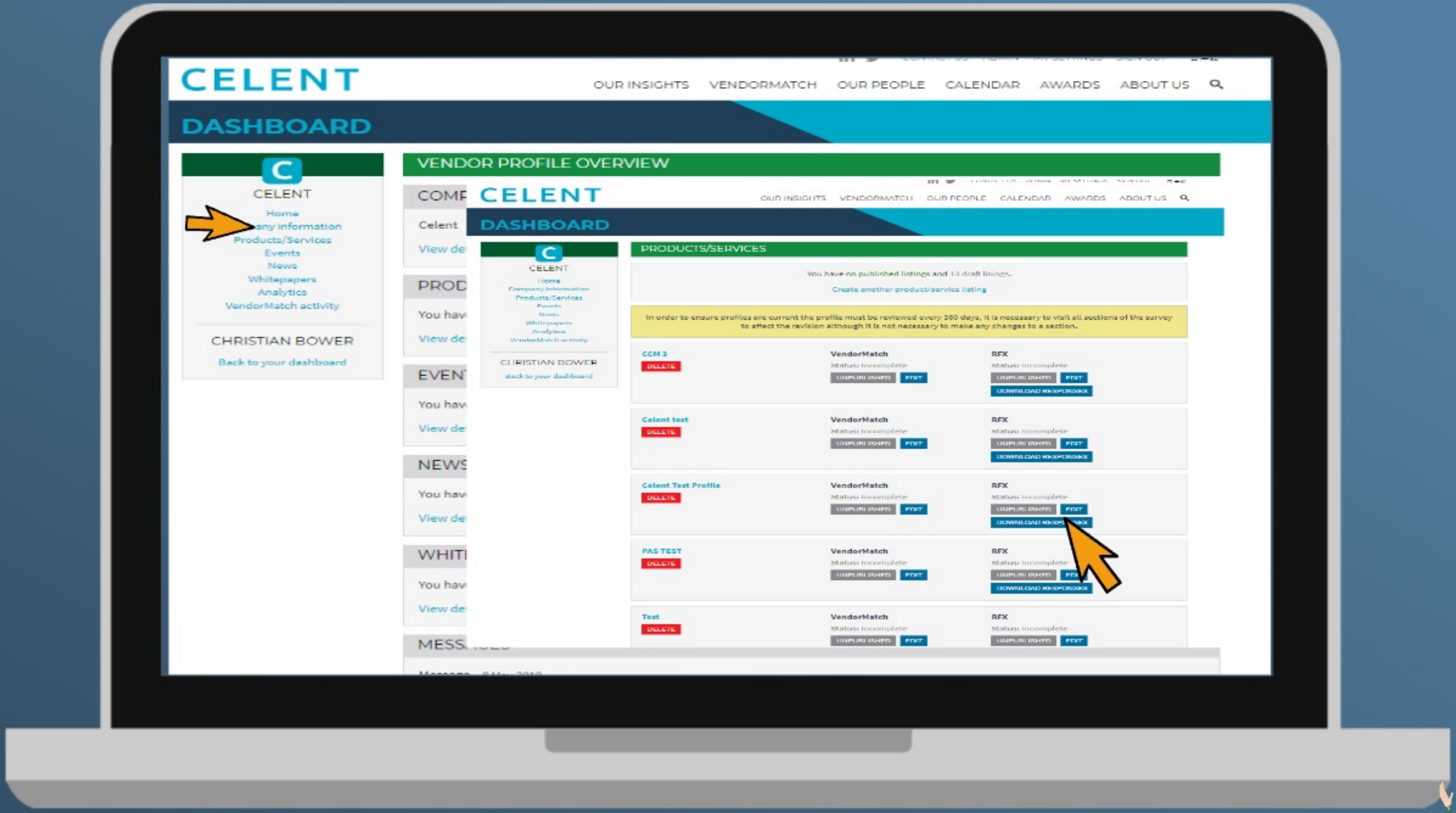
You can check your public profile via vendor dashboard or via a user search

Completing the RFX Request for Information

1. Click
Products / Services

2. then, in the next screen click edit RFX.

Note you can download the survey with responses to share internally but responses must be made online.

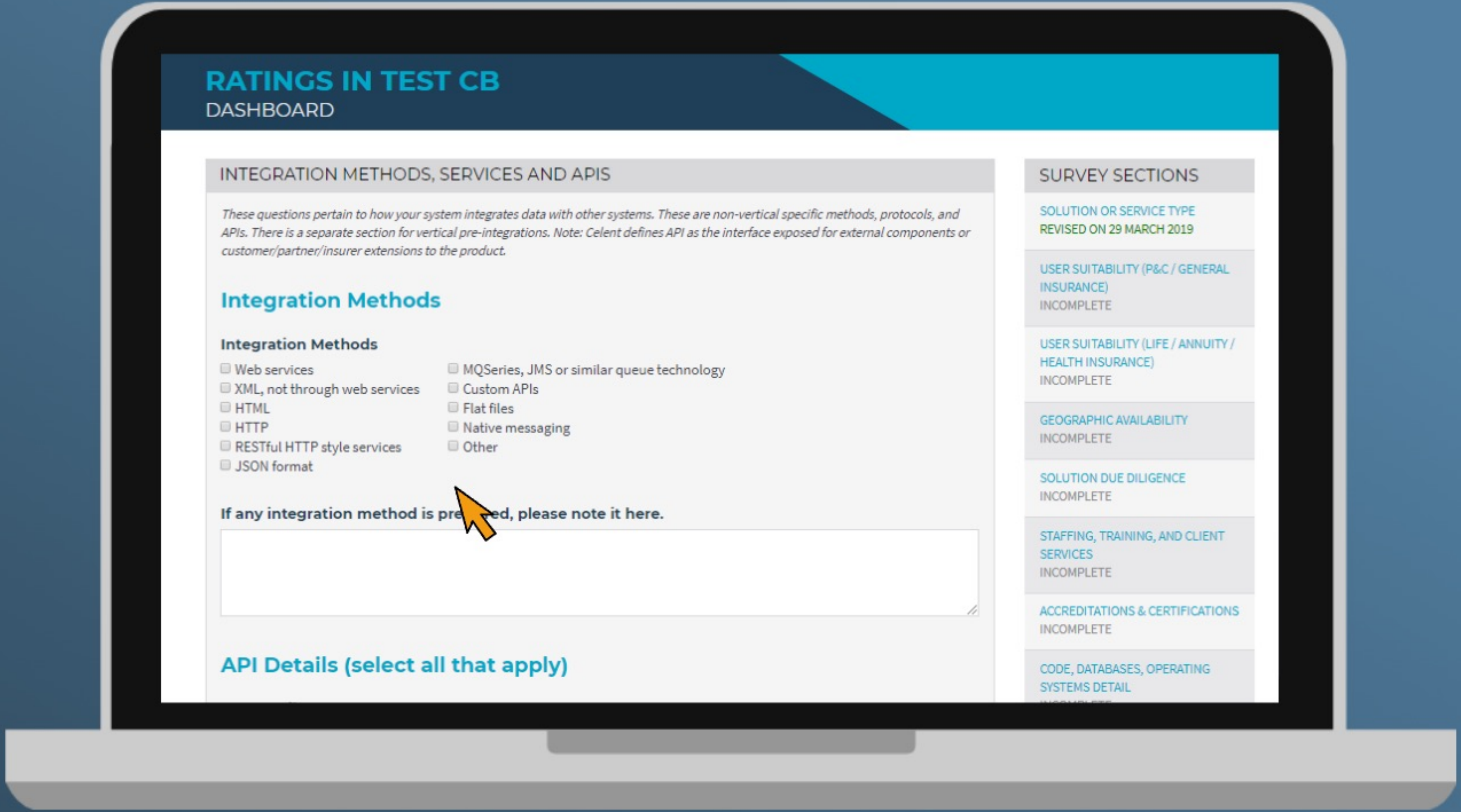


The response requires input from SMEs comfortable with responding to RFIs.

Completing the RFX – RFI

Solution types have already been selected from the solution categorization form.

Work through the survey saving regularly.



Note: To share RFX information only with Celent only leave it unpublished. If you wish to receive RFX access requests then publish – which adds the RFX Report request link to the solution profile.


PART 6
RFX Use cases and
Vendor Controlled
Release Process
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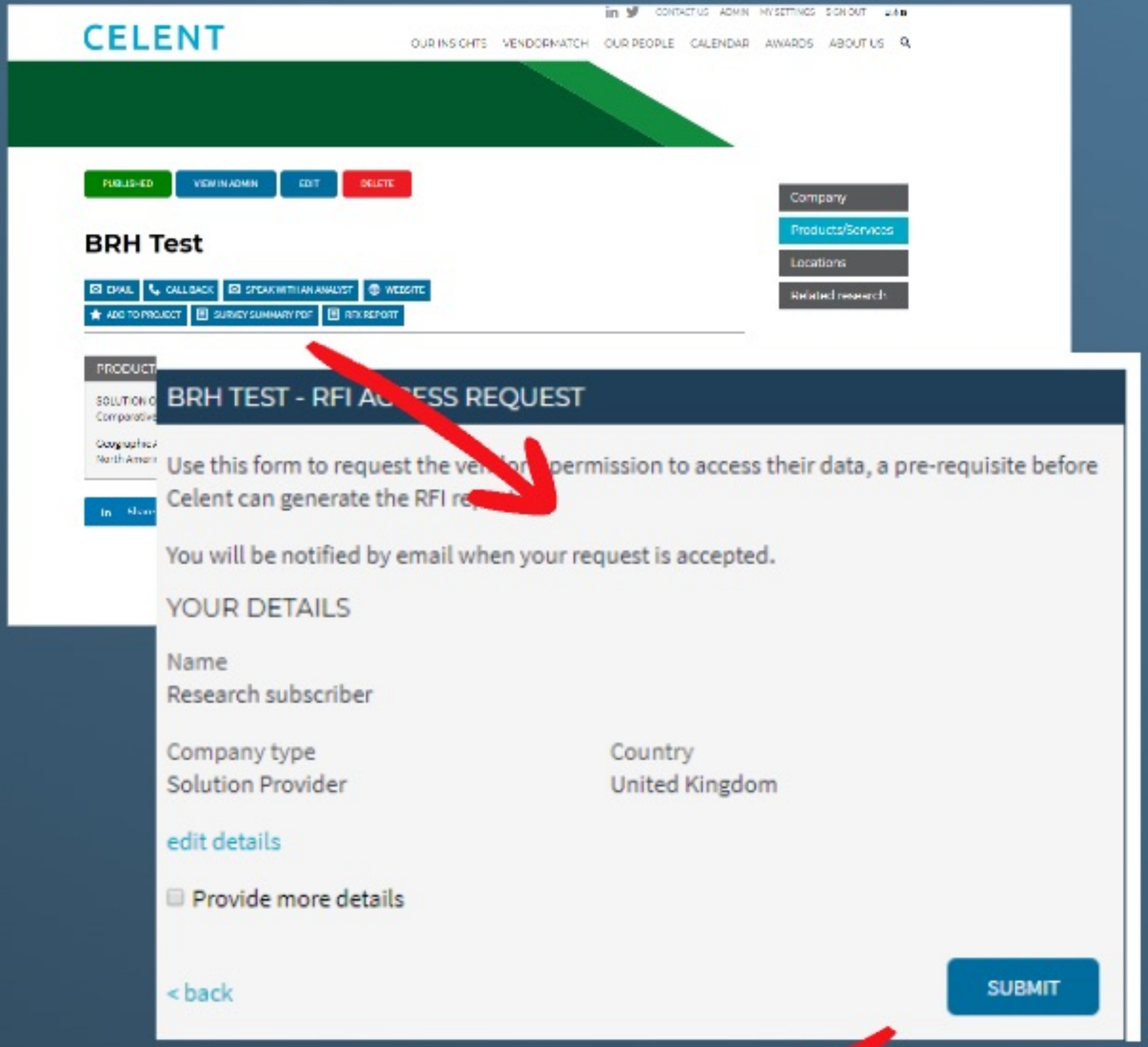
RFX - use cases: Celent Research

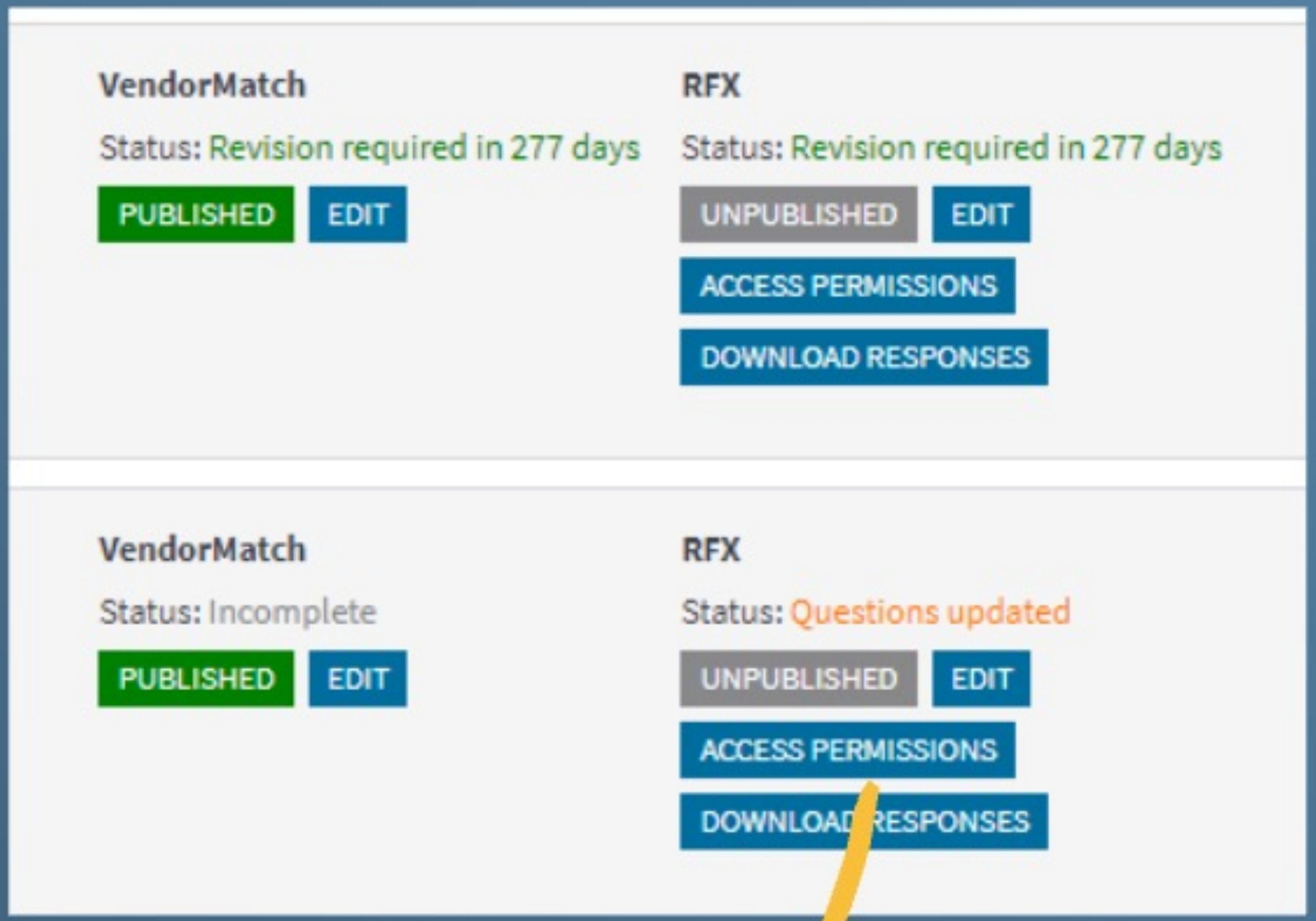
Celent analysts will use RFX information for research and will alert you by email to any planed reports.

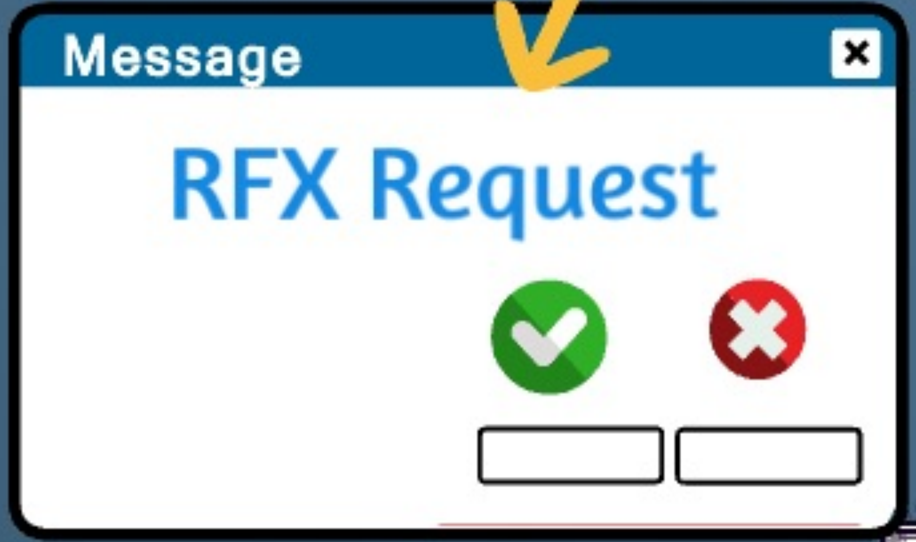
You can update your RFX RFI with the latest information and email us when you're ready.

Use case – RFX report access requests

Legitimate users like Mark with a RFX subscription can request access to RFX Reports from a solution profile page.







When you receive an RFX Report access request via email you will be able to grant or deny access from your product mgmt page.


PART 7
User management and adding collaboration
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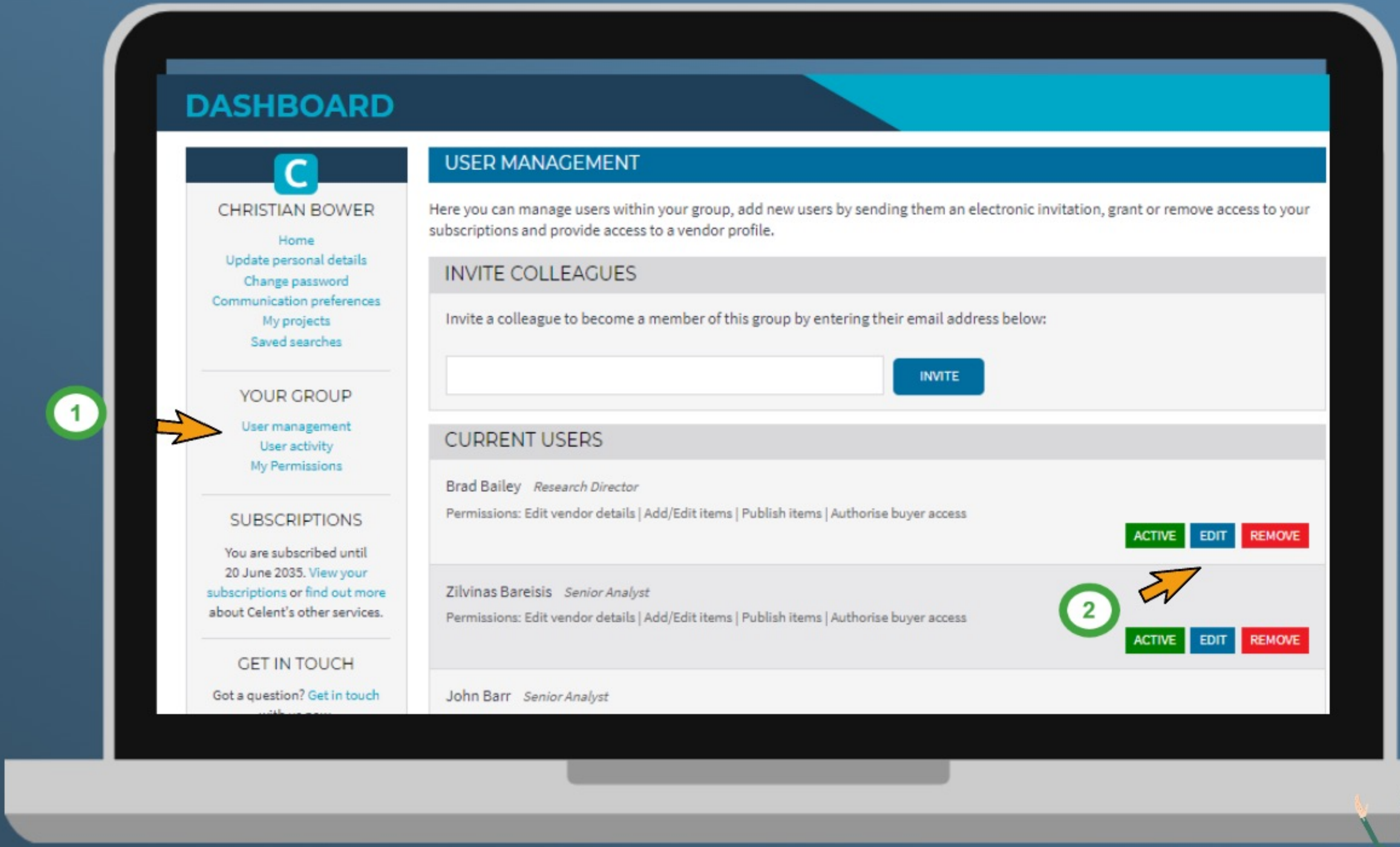
Add colleagues to collaborate

Part 7.
CELENT
User mgmt

1 Go to the main dashboard via my settings and click user management
.

2 Then click edit.



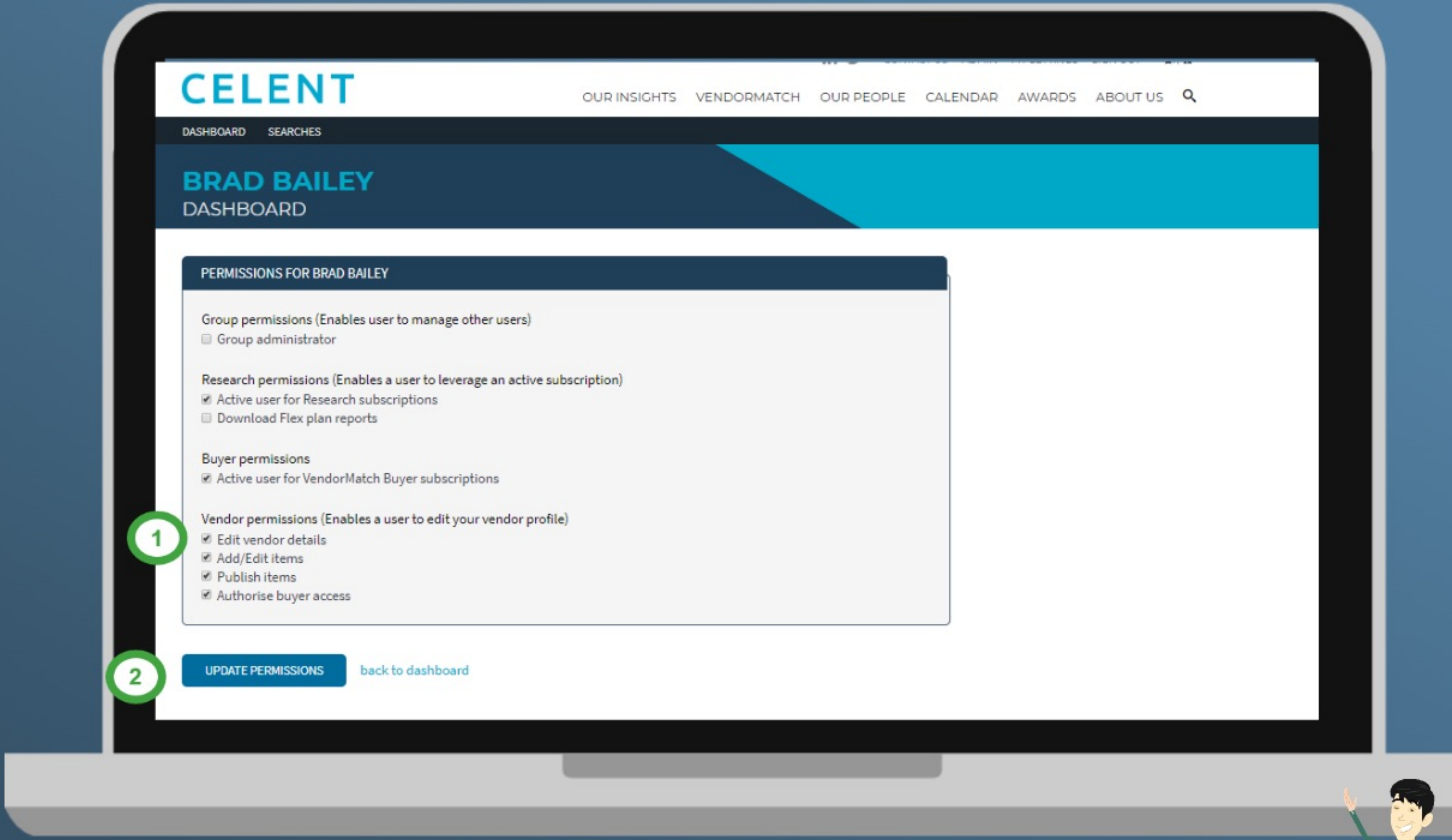
INVITE COLLEAGUES TO JOIN YOUR USER GROUP SO YOU CAN COLLABORATE AND MANAGE PROFILES AND WORK ON ENQUIRES & LEADS.

Add colleagues to collaborate

1 Provide the required levels of access in the vendor permissions section.

Consider making them a group administrator so they can invite others.

2 Then click update.



Set user privileges.


PART 8
PRO subscriptions
&
Using analytics
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Upgrade your profile with a PRO subscription.

Choose the package that best fits your needs.

All Pro options ensure your profile links are live.

All PRO level offer statistics.

The higher the PRO level, the more information your get on visitors to your profile.

Feature	Description	Free	PRO 1	PRO 2	PRO 3
PROFILE					
Company Profile	Company profile on the VM directory.	✓	✓	✓	✓
LIVE LINKS					
Website Link	Link to your website.		✓	✓	✓
Contacts Links	Link our message and call back request dialogue box to a hidden email address.		✓	✓	✓
BUYER INFORMATION SHARING					
Survey Summary Report	A link for subscribing Financial Institutions & advisors to download a summary of your company and product profiles and responses to the VendorMatch survey.	✓	✓	✓	✓
RFX Report	A link for subscribing Financial Institutions and advisors to request access to a report on one of your solutions. Includes company profile, company risk survey, product profile and RFX responses.	✓	✓	✓	✓
MARKETING ANALYTICS					
Quantitative Analysis	Statistics on impressions / views / downloads / clicks.		✓	✓	✓
Company & Demographics	Details of users engaging with your profile including company, type, location.			✓	✓
Individual	Further details of users engaging with your profile including user title.				✓
Market Intelligence	A detailed overview of what systems are getting the most and least interest on VM.				✓
ADVERTISING					
Matchboxes	Contextual matchbox ads on results page.	As per rate Card			
Skyscrapers	Contextual skyscraper ads on results page.				

YOU CAN FIND THE LATEST FEATURES CARD IN THE ABOUT SECTION OF OUR WEBSITE.

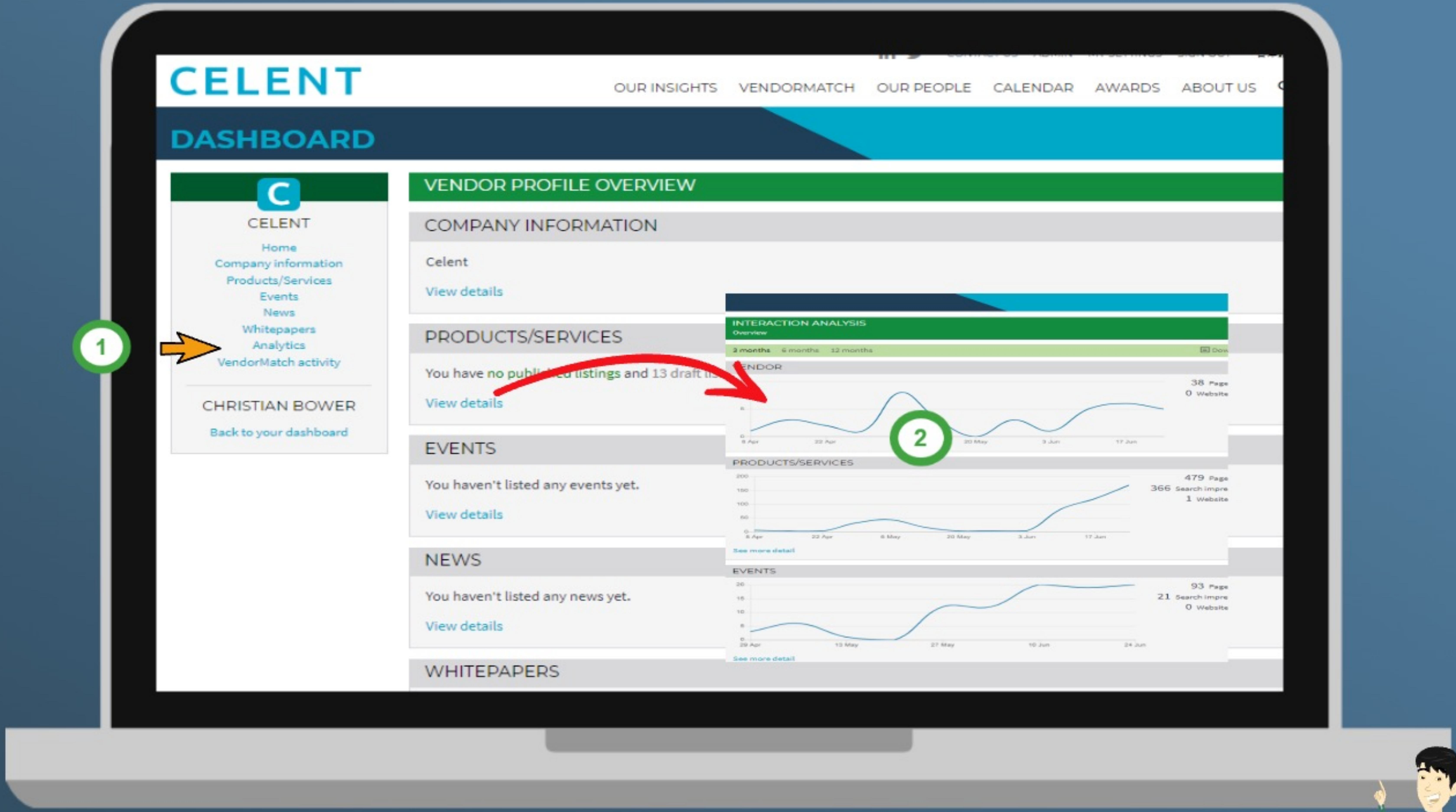
PART 9

Analytics, Audit Trails and Trends

Accessing analytics

1. From within the Vendor dashboard Click Interaction Analytics

2. Top level analytics shows how many aggregated page views you are getting at the company, product, event, news or whitepaper levels.



All vendors get their high-level statistics & audit trails.

Visitor Details

1. Click show more (again)

2. The table shows visitor details according to your PRO subscription.

THE TABLE SHOWS VISITOR DETAILS INCLUDING COMPANY NAME, TITLE, LOCATION, ACTION & IP ADDRESS.

360 degree analytics & audit trail

Part 9
CELENT
Analytics

1. From the first page scroll to the table at the bottom.

   Then click view all.

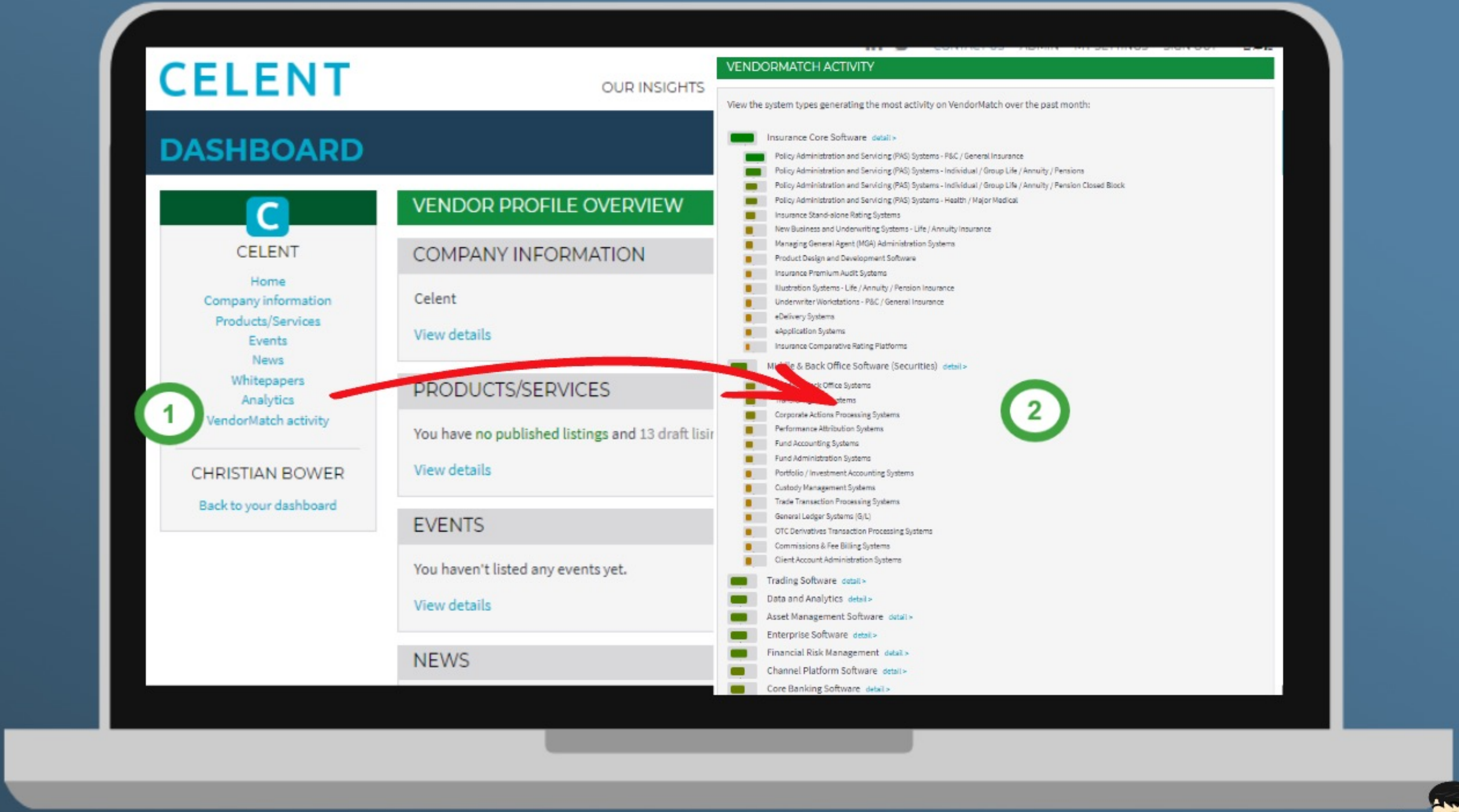
2. In the next page you can filter on date range, action type and visitor company type

The table shows interaction & audit trail information associated with your entire profile - Visitor details are depending on your level of PRO subscription

Trend Analysis

1 Click Vendormatch Activity

2 Vendormatch activity provides a good representation of whats trending in the world of financial IT.



Feed trend analysis into your management information process to assist in decision making.


PART 10
Adding & Editing Events, News & Whitepapers
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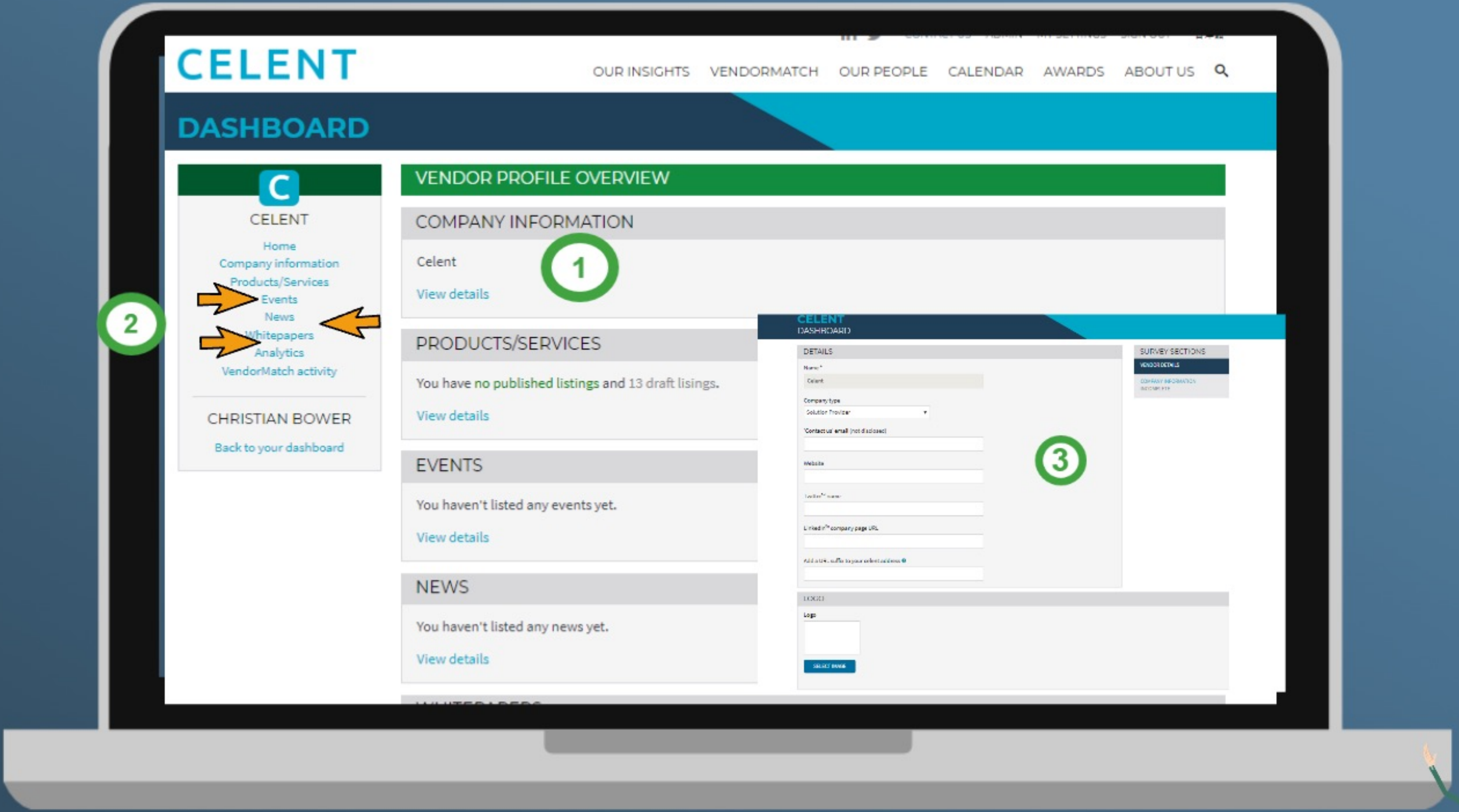
Adding / editing events, news & whitepapers

1 NOTE
You need to have a company profile created before you can add any of these items. (See section 3)

2 From My Setting > Go to Vendor Dashboard > Click events, news or whitepapers.

3 In the next screen complete the information upload form.



These will appear on your profile and other ares of the website such as the events calendar and vendor news feed.

Thank you for watching this training video.

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