



HOW TO CREATE, OPTIMIZE AND MANAGE YOUR VENDORMATCH PROFILE & COMPLETE AND LEVERAGE RFX



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.













What is VendorMatch?







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



1

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



reports and comparison analysis to detmine suitability. (The short-list)

VENDORMATCH DISCOVERY IS OUR MARKET SCOPING, SOLUTION DISCOVERY AND SHORT-LISTING TOOL.



Modules and Data Structure Vendor





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.

> RFX is our secure facility for storing, updating and sharing precompleted responses to RFIs AUTHORED BY CELENT'S ANALYSTS.

STEP

STEP

3

Modules and Data Structure



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.

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

DISCOVERY PHASE

VendorMatch Discovery + RFX

4



Parameter Search

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



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

RFX Reports

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

5



Expert Opinion

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



Summary Reports

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

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





08 Use visitor analytics to generate leads for sales to follow up SS 07 Strong SEO drives further enquiries on our platform. RelLibrar 06 Learn about market ((•)) trends and feed this information into your product and marketing strategies. (\star)

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

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.

01 Ensure you are found by genuine buyers who are early in the buying cycle and scoping the market for solutions. comparison Shortlisting 02 Showcase your full portfolio of solutions – incumbent vendors often get overlooked because buyers are unaware. 03 Tap into our 20,000 strong 0 user base of financial IT \times Project Manager professionals 04 Get enquiries from prospects who have used our platform to prequalify your match to their

requirements.













Vendor inputs, data structure & protection of information





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

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

0h10m

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

3

4

5

6

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

0h5m

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

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

2h30m





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

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

2



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

VendorMatch Data Security



4 Invite colleagues to work collaboratively see user mgmt secton.





COMPLETE YOUR PROFILE IN THIS ORDER











Creating & editing your company profile & the key-facts form.







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





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THE COMPANY PROFILE FORM POWERS YOUR PUBLIC COMPANY PAGE FROM WHICH EVERYTHING ELSE, LIKE SOLUTIONS, NEWS, EVENTS, WHITEPAPERS IS CONNECTED.





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.

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ASHBOARD	
	CELENT
DETAILS	
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Celent	E river & excert
Company type	Overview
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	vendarsiatch is an essential research and due diligence resource for anyone involved in Financial /7 or Operations, vendarsmatch helps market precisioners from financial institutions develop applying an aborption, the platform allows users to discover.

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.

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	SURVEY SECTIONS
	VENDOR DETAILS
After this please move on to the products and services section where you complete the directory check box listing forms. Access to this section is provided via the menu	
bout Us if you require further information or contact us.	COMPANY INFORMATION INCOMPLETE
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2017)	
2018)	













Creating & editing your solution profile & categorizing / classifying solution type correctly.







OUR INSIGHTS VENDORMATCH OUR PEOPLE CALENDAR AWARDS ABOUT US Q VENDOR PROFILE OVERVIEW II IF CONTRACT ALTER PROPERTY PARTY AND CELENT COMPANY INFORMATION OUR INSIGHTS VENDORMATCH OUR PEOPLE CALENDAR AWARDS ABOUT US Q. ASHBOARD Celent CELENT RODUCTS/SERVICE You have no published listings and 10 draft lisings. View details Harry Company information Hardwin, Strevens Duents Mean Withopapars Analytics Vender Watch anterly n order to ensure profiles are current the profile must be a isso, it is necessary to visit all section PRODUCTS/SERVICES affect the revision sithough it any changes to a section VendorHelsh CHRISTIAN BOWER Statute incom You have no published listings and 13 draft lisin Rack to you when the set UNPODIALE View details EVENTS Callent Test Pro You haven't listed any events yet. -----INCOMES PORT View details 00.00 rendertratch UNPUBLISHES THE UNPUNISHES THE NEWS WendorMatch 2015/26 Status: incompliate Status: represists You haven't listed any news yet. UNPUGUSIES COT UNPODUSICE 2017 View details

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







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.

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	The domain is not supported by your API key. Please review your domain settings here. ×

THIS IS YOUR PUBLIC PAGE SHOWCASING YOUR SOLUTION IN VENDORMATCH DISCOVERY, THE PROFILE FORM INFORMATION ALSO SHOW IN REPORTS.



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 texonomy. Finally, we recommend you save your work regularly using save and continue and then clicking back on your browser. In order to evoid 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 Autometion 8
- 🗆 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

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.







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



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.

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





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.





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

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

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 4



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

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











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







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.





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 LEVELS:

- Incomplete
- Complete

- Questions updated

USER SUITABILITY (CAPITAL MARKETS & INVESTMENT MGMT)

User Suitability (Capital Markets & Investment Mgmt) Select the target institutional user type(s) for your solution.

- Asset Managers
- Trading firms
- Wealth Managers

SAVE & CONTINUE

uggest amendments



YOU CAN CHECK THE RESPONSE STATUS OF ANY QUESTION SECTION FROM WITHIN THE QUESTIONNAIRE ITSELF.





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.



VICES		
	You have no published listings and 1	7 draft lisings.
	Create another product/service	e listing
	e profile must be reviewed every 360 sion although it is not necessary to m) days, it is necessary to visit all sections of the survey nake any changes to a section.
	VendorMatch	RFX
CELENT	Status: Incomplete	Status: Incomplete
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		ACCESS PERMISSIONS
		DOWNLOAD RESPONSES
	VendorMatch	RFX
MARAZI	Status: Incomplete	Status: Incomplete
11		UNPUBLISHED EDIT
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	•	DOWNLOAD RESPONSES
_	VendorMatch	RFX
CELENT	Status: Incomplete	Status: Revision required in 328 days
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		WILLOAD RESPONSES
		BEV







Click the solution name to see your live profile.



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

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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.

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

Work through the survey saving regularly.

RATINGS IN TEST CB DASHBOARD

INTEGRATION METHODS, SERVICES AND APIS

These questions pertain to how your system integrates data with other systems. These are non-vertical specific methods, protocols, and APIs. There is a separate section for vertical pre-integrations. Note: Celent defines API as the interface exposed for external components or customer/partner/insurer extensions to the product.

Integration Methods

Integration Methods Web services XML, not through web services ■ HTML HTTP RESTful HTTP style services JSON format



SURVEY SECTIONS

SOLUTION OR SERVICE TYPE REVISED ON 29 MARCH 2019

USER SUITABILITY (P&C / GENERAL INSURANCE) INCOMPLETE

USER SUITABILITY (LIFE / ANNUITY / HEALTH INSURANCE) INCOMPLETE

GEOGRAPHIC AVAILABILITY INCOMPLETE

SOLUTION DUE DILIGENCE INCOMPLETE

STAFFING, TRAINING, AND CLIENT SERVICES INCOMPLETE

ACCREDITATIONS & CERTIFICATIONS INCOMPLETE

CODE, DATABASES, OPERATING SYSTEMS DETAIL

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.













RFX Use cases and Vendor Controlled Release Process





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.



RFX

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














User management and adding collaboration





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



DASHBOARD

CHRISTIAN BOWER

Home Update personal details Change password Communication preferences My projects Saved searches

YOUR GROUP

ser management User activity My Permissions

1

SUBSCRIPTIONS

You are subscribed until 20 June 2035. View your subscriptions or find out more about Celent's other services.

GET IN TOUCH

Got a question? Get in touch

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







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

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

Then click update.





DASHBOARD SEARCHES **BRAD BAILEY** DASHBOARD PERMISSIONS FOR BRAD BAILEY Group permissions (Enables user to manage other users) Group administrator Research permissions (Enables a user to leverage an active subscription) Active user for Research subscriptions Download Flex plan reports Buyer permissions

OUR INSIGHTS VENDORMATCH OUR PEOPLE CALENDAR AWARDS ABOUT US Q

Active user for VendorMatch Buyer subscriptions

Vendor permissions (Enables a user to edit your vendor profile)

- C Edit vendor details
- Add/Edit items
- Publish items
- Authorise buyer access

UPDATE PERMISSIONS

back to dashboard















PRO subscriptions & Using analytics





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.

	Feat
	Company Profile
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	Contacts Links
\$	Survey Summary Report
	RFX Report
	Quantitativo Analysis
	Company & Demograph
1	ndividual
	Market Intelligence
•	Matchboxes
	Skyscrapers

You can find the latest features card in the About section of our Website.

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	PROFILE				
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	LIVE LINKS				
C	Link to your website.		-	~	~
	Link our message and call back request dialogue box to a hidden email address.		~	~	۲
	BUYER INFORMATION SHARING				
	A link for subscribing Financial Institutions & advisors to download a summary of your company and product profiles and responses to the VendorMatch survey. A link for subscribing Financial Institutions	~	~	۲	~
	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				
	Statistics on impressions / views / downloads / clicks.		-	-	۲
s	Details of users engaging with your profile including company, type, location.			-	۲
	Further details of users engaging with your profile including user title.				~
	A detailed overview of what systems are getting the most and least interest on VM.				~
	ADVERTISING				
	Contextual matchbox ads on results page.		\s per r	ate Cr	ard
	Contextual skyscraper ads on results page.				











Analytics, Audit Trails and Trends





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.



Click show more 1 (again)



The table shows visitor details according to your PRO subscription.





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





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

Then click view all.



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







Click Vendormatch Activity



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











Adding & Editing Events, News & Whitepapers







Adding / editing events, news & whitepapers

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

2

(1)

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



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.

OUR INSIGHTS VENE	DORMATCH OUR PEOPL	LE CALENDAR	AWARDS	ABOUT US	٩
VENDOR PROFILE OVERVIEW					
COMPANY INFORMATION					
Celent 1 View details					
	CELENT DASHBOARD				
PRODUCTS/SERVICES	DETAILS Name*			SURVEY SECTIONS VENDORDEDHIS	
You have no published listings and 13 draft lisings. View details	Companyitype Solution Provider Contactual email (not disclosed)			CONFAMPLATE BUTCHER PTP	
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Thank you for watching this training video.



CELENT

