



# COVID-19 Channel Impact Study

## Executive Summary

Special Session for the IPED Channel Masters Community

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Channel**Masters**®

**IPED**® Consulting  
Channelytics®

# Your Hosts



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Sr. Consultant

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# Agenda

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Objectives & Methodology

Executive Summary

- ▶ Business Model
- ▶ Financial Implications
- ▶ Sales, Marketing and Pipeline Implications
- ▶ Technology Segment Implications
- ▶ Industry Segment Implications

Vendor Guidance

Appendix: Supplemental Materials



## Objectives & Methodology



Unique perspective from both **managed/strategic** partners and the **channel at large**



# COVID-19 Channel Impact Study



**Our primary goal is to share what we heard from the partner community and provide our insights on how that may affect your channel GTM direction.**

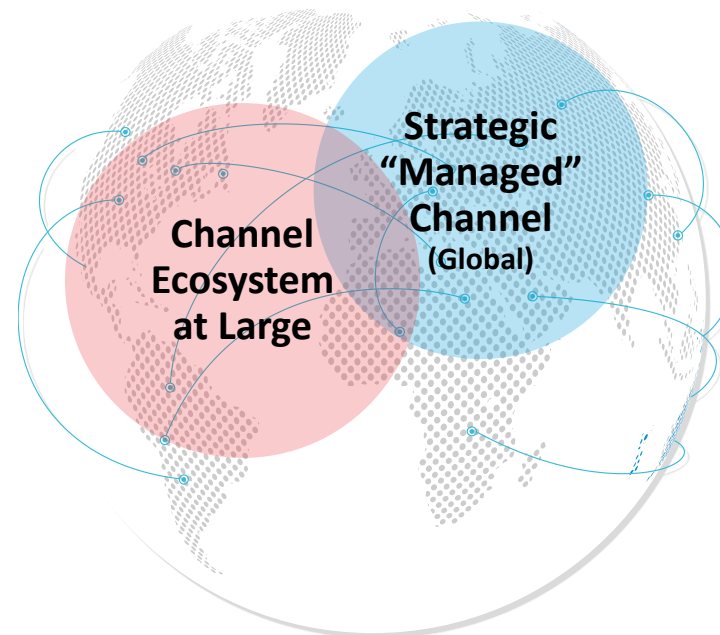
## Objectives

- ▶ Gain perspective on how the COVID-19 pandemic is affecting solution providers
- ▶ Analysis of its impact based on different solution provider characteristics:
  - Different business models, customer set served, solution orientation, and geographic location
- ▶ Key insights into their current business environment and insights on its impact over the next 3-6 months
- ▶ Provide vendor insights on ways to approach the situation

## Methodology

**On-line survey** (Channel-at-large; Primarily NA)

- ▶ Fielded between **April 15<sup>th</sup> - April 30<sup>th</sup>**
- ▶ **265** total responses
- ▶ Data cleansed and normalized for outliers; data represents medians unless otherwise noted



**Partner interviews** (Managed/Strategic solution providers; Global)

- ▶ **61** targeted **partner interviews**
  - ▶ **10** countries across NA, EMEA and ANZ
  - ▶ **Roles:**
- |                               |     |
|-------------------------------|-----|
| Founder, President and/or CEO | 46% |
| Managing Director             | 16% |
| VP/Dir Sales or Marketing     | 15% |
| VP/Dir Technical / Services   | 13% |

# Understanding the research questions and metrics

**Scale:** The scale below was used throughout the research in both on-line surveys as well as in 1:1 interviews.



## Questions: The following were the questions asked during the interviews in the 5 major categories

Q1: How much has COVID-19 affected your overall business so far?

### Business Model

- Q2: How do you see this situation impacting your Product Resell revenue in the next 3 - 6 months?
- Q3: How do you see this situation impacting your Project Services revenue in the next 3 - 6 months?
- Q4: How do you see this situation impacting your Managed Services revenue in the next 3 - 6 months?
- Q5: How do you see this situation impacting your Cloud Services revenue in the next 3 - 6 months?

### Financial Implications

- Q6: How do you see this situation impacting your Staffing revenue in the next 3 - 6 months?
- Q7: How do you see this situation impacting your Cash Flow revenue in the next 3 - 6 months?
- Q8: How do you see this situation impacting your M&A revenue in the next 3 - 6 months?
- Q9: How do you see this situation impacting your contracts/payments revenue in the next 3 - 6 months?

### Sales, Marketing and Pipeline Implications

- Q10: How do you see this situation impacting your ability to close current quarter opportunities?
- Q11: How do you see this situation impacting your Current pipeline revenue in the next 3 - 6 months?
- Q12: How do you see this situation impacting your New Pipeline revenue in the next 3 - 6 months?

### Technology Segment Implications

Q: Which technology segments do you expect to see impacts to your business in the next 3 - 6 months?


### Industry Segment Implications:

Q: Which industry segments do you expect to see impacts to your business in the next 3 - 6 months?

# Contents

Executive Summary



 **Uncertainty**



# This is More Than Business...This is Personal



“I will be re-evaluating my strategic vendors once this is over...how they **act today** will determine if they are a partner or just another vendor.”

“In case you didn’t remember, after the pandemic of 1918, came the **roaring twenties.**”

“I am staring down **a knuckleball**, there really is no way to tell where it is going.”

“I was a soldier in Desert Storm, we all have a plan until you engage the enemy...at which point **your ability to adapt and react quickly is** paramount.”

“I have not been in one place for 30 days in 3 decades... this has been a grand awakening. YOGA. Everyday. Mind & body. **This is LIFE changing.**”



# The Covid-19 Immediate Market Inflection Point

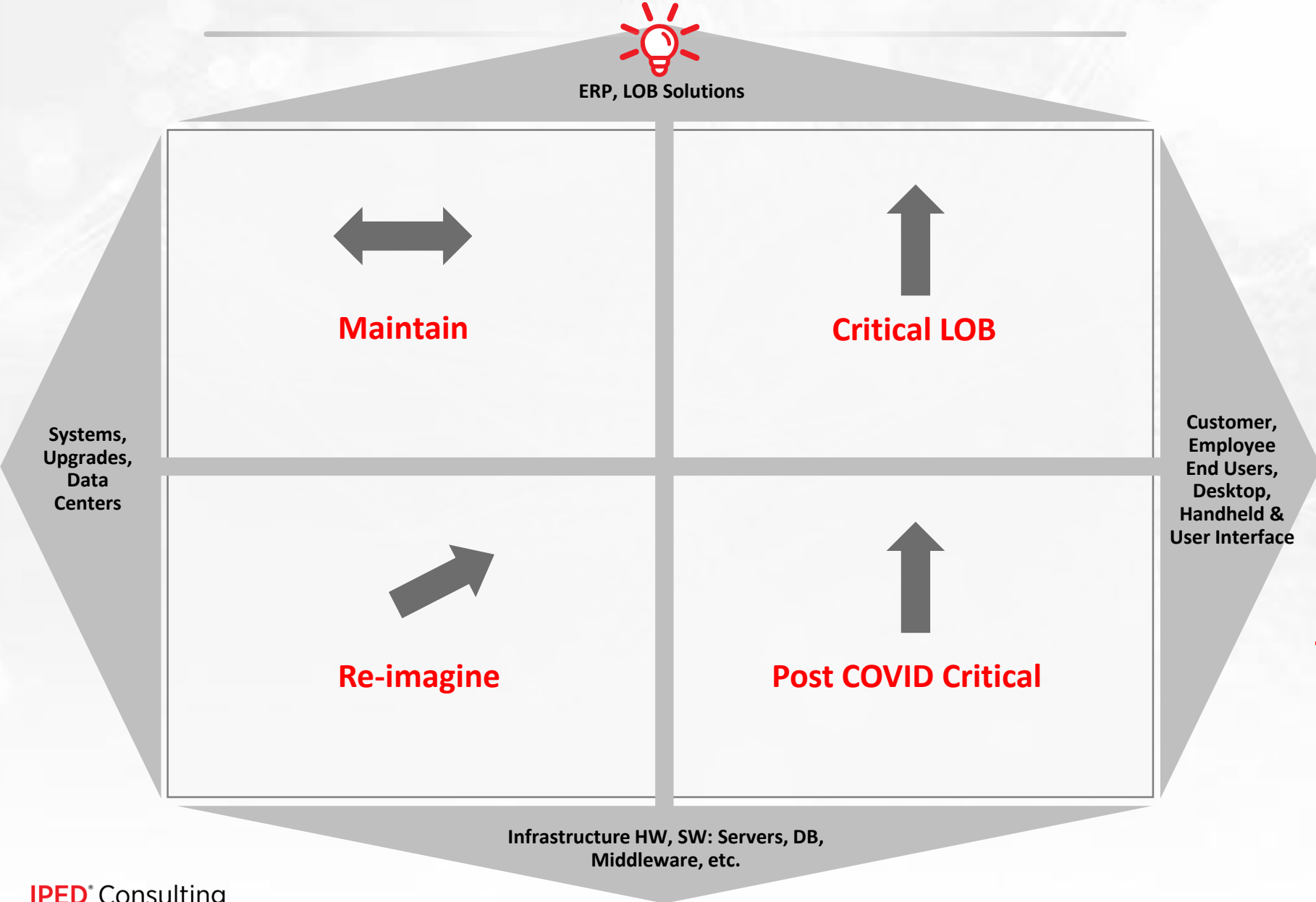


- **This is a time of dramatic change requiring lightening fast leadership with laser like clarity ...** we will not return to our previous world (in many ways).
- **Post Covid-19, new world challenges:**
  - We don't have regular face to face access to our constituents, customers and partners
  - We need to balance revenue performance with partner relationship needs
  - The world economy must re-start and some industries and technology areas will take significantly longer to recover



- **Partners are transforming their businesses aggressively to ensure profitable survival**
  - Your role in dealing with today's business challenges and your partners' transformations will inform your partner relationships for years.
  - Step into the void, address fear uncertainty and doubt; show your partners, who are moving forward, your path.

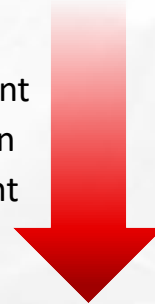
# Covid-19 Solution & Revenue Impact Map Samples



## Preliminary Covid-19 by Industry

**Negative Impact:**

- Oil & Gas
- Hospitality & Restaurant
- Travel & Transportation
- Media & Entertainment
- Air & Cruise Lines
- US State & Local Gov't



**Moderate Impact:**

- All Others

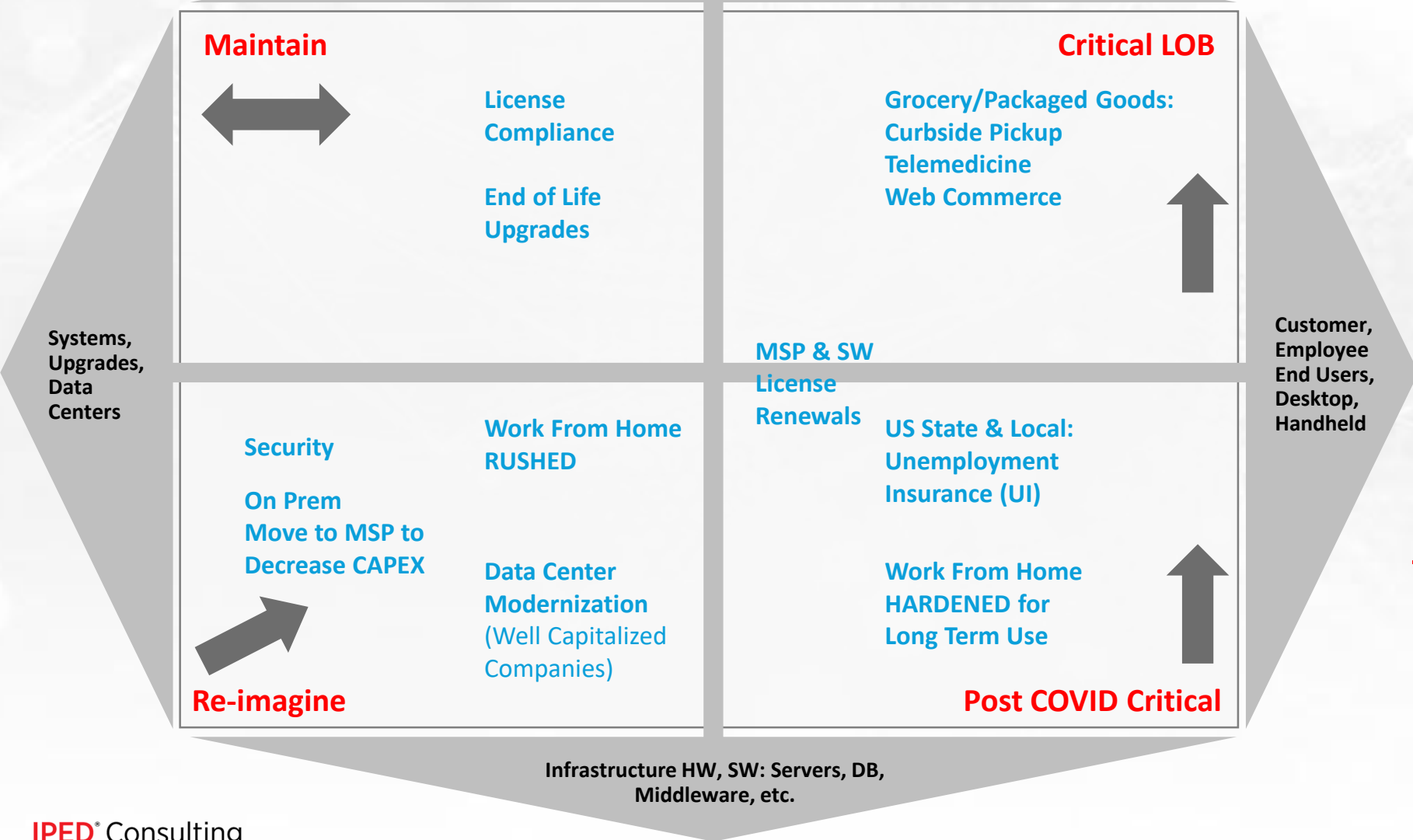
**Positive Impact:**

- Consumer Packaged Goods
- Selected IT
- Selected Healthcare
- Well Capitalized Re-inventors

# Covid-19 Solution & Revenue Impact Map Samples



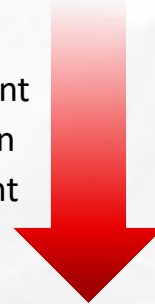
ERP, LOB Solutions



## Preliminary Covid-19 by Industry

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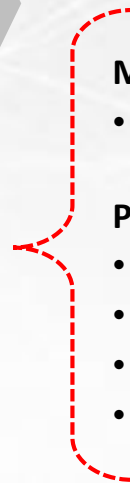


### Moderate Impact:

- All Others

### Positive Impact:

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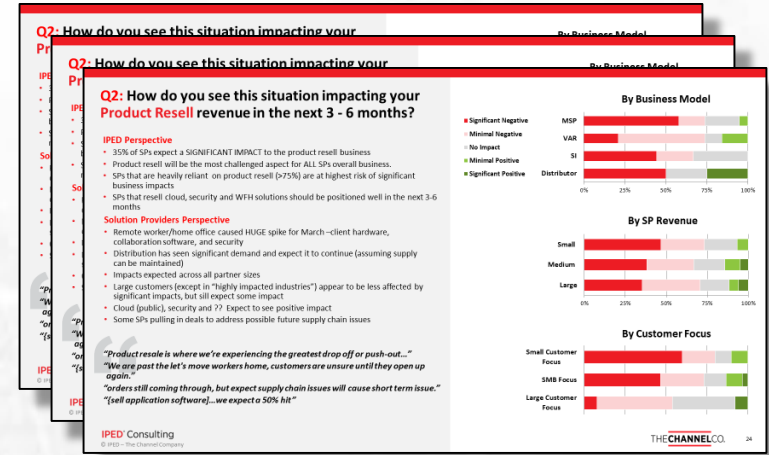
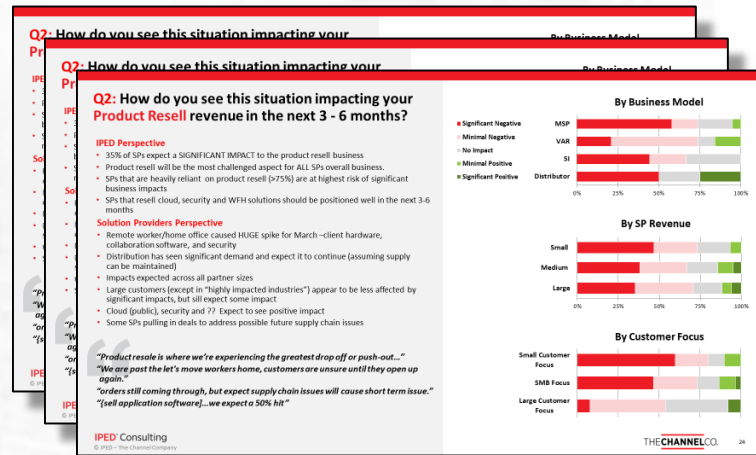
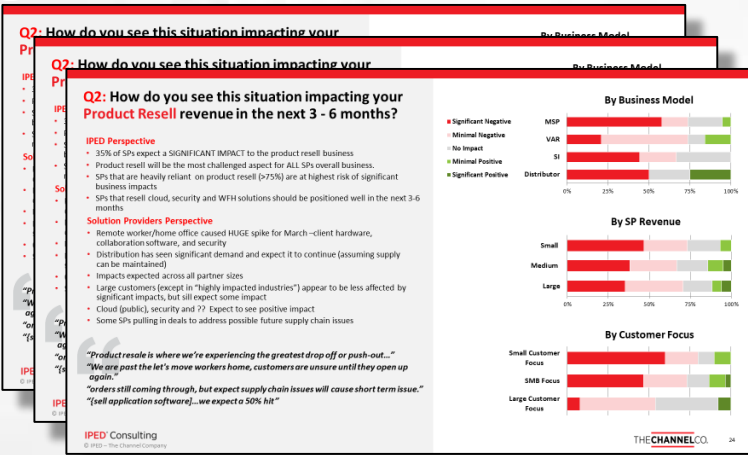


# Details Available in 6 Primary Sections... *today we will cover the exec summary*

## 1 Business Model

## 2 Financial Implications

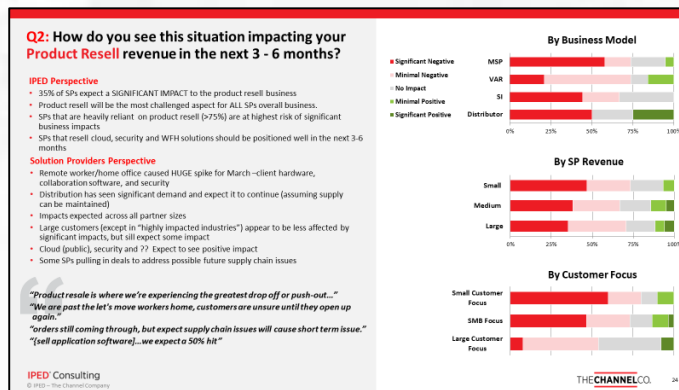
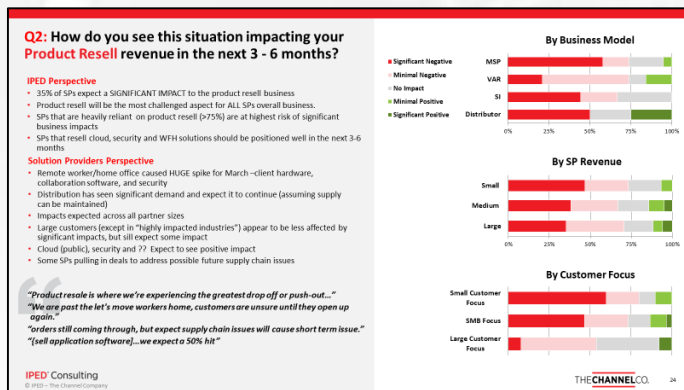
## 3 Sales, Marketing and Pipeline



## 4 Technology Segment Implications

## 5 Industry Segment Implications

## 6 Appendix: Vendor Initiatives



**COVID19 Supplemental Materials**  
**Appendix 1**  
 Vendor Programs  
 Distribution Insights  
 Work From Home (WFH) Technology Samples

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# Q1: How much has COVID-19 affected your overall business so far?

## Q1

The negative business impact in **Q1 was MINIMAL** for most solution providers; Q1 was a GREAT quarter for most solution providers

## Q2

Q2 is soft and solution providers expect **Q2 to be challenging**; deals paused or pushed

## Q3/Q4

One of the most significant issues is the **visibility in Q3/Q4**

- **UNCERTAINTY**
- **New pipeline is difficult to build right now**

## 60+%

of solution providers expecting **NO IMPACT to POSITIVE** impact in the cloud/managed services business

- **Managed services, cloud, security, WFH and POST COVID Critical are bright spots**

- Solution providers are a people-based business... **employee retention is a top concern**
- Small / Mid size partners have been the most affected so far
- Solution providers with **VAR business model most impacted**
- Solution providers with **recurring revenue services more insulated**

# Q1: How much has COVID-19 affected your overall business so far?



- The negative business impact in Q1 was MINIMAL for most solution providers
- Q2 is soft and solution providers expect Q2 to be very challenging
- A significant issue is the visibility in Q3/Q4, new pipeline is difficult to build right now
- Managed services, cloud, security, WFH and POST COVID Critical are bright spots
- Solution providers are a people-based business...employee retention is a top concern
- Small / mid size partners have been the most affected so far
- Solution providers with VAR business model most impacted; Solution providers recurring revenue services more insulated

## Solution Providers Perspective

- Great Q1 – Most SPs stated they were having one of their best Q1’s ever even though some lost 2+ weeks of “slowed” closing.
- More managed / cloud business = less concerns
- The "modified" selling process is causing partial slowdown in Q2
- Many expecting government assistance to float their business for now
- Larger solution providers appear more insulated
- Solution providers with smaller customers are most impacted
- Supply risk driving some purchasing decisions
- Push to enable remote work force happened quickly – (days); solution providers see opportunity to expand and harden

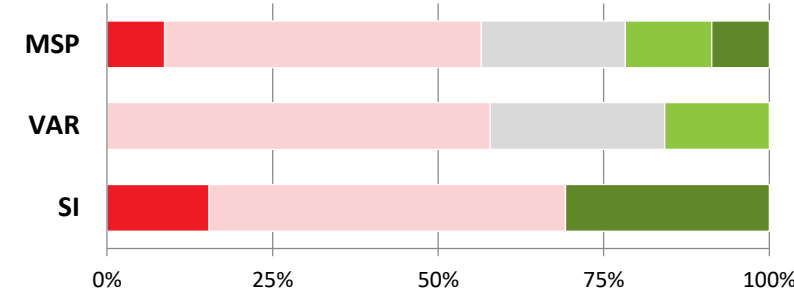
*“I don’t think we’ll see normalized cash flow until May 2021.”*

*“This scenario will prove out that teleworking can really work, and actually INCREASE productivity...modernization of workforce, long-term, ability to attract millennial workforce, reduction of physical locations costs – it’s all good!”*

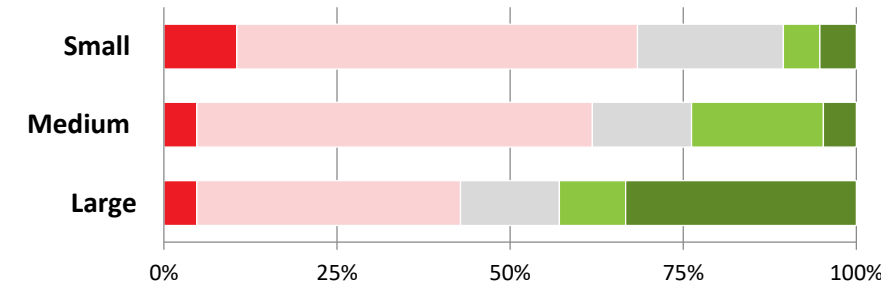
*“...had a great Q1 (best ever)...Q2 is soft, but Q3/Q4 is a complete unknown right now”*



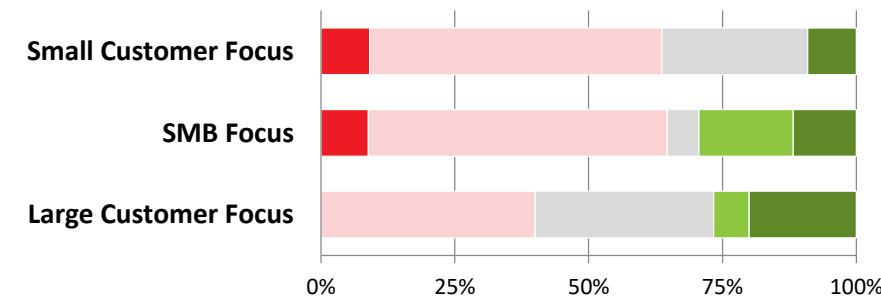
By Business Model



By SP Revenue



By Customer Focus

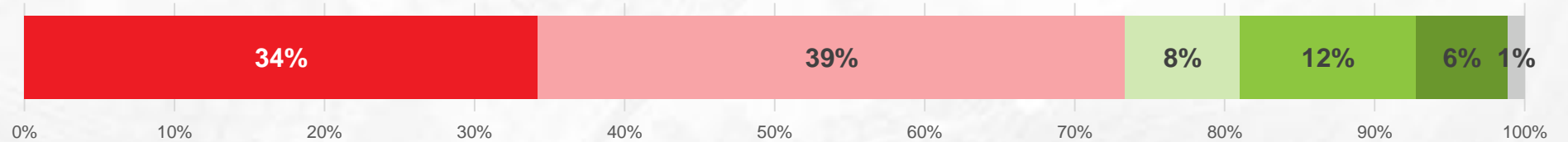


# How much has COVID-19 affected your overall business so far?

## Channel Ecosystem at Large

■ Significant Negative Impact   ■ Minimal Negative Impact   ■ No Impact   ■ Minimal Positive Impact   ■ Significant Positive Impact   ■ Dont know

How much has COVID-19 affected your overall business so far?



### IPED Analysis

- Solution provider community is comprised of many smaller solution providers who are more vulnerable
- Initial reactions to COVID-19 situation were more positive (in early March)
  - Great Q1
  - Demand for Work from Home (WFH)
  - Governments providing funding
  - Stay home orders were limited
- Shifts in next normal, post COVID environment have created uncertainty
  - Some technologies shifting to “re-imagine”

# Business Model Summary (Over the Next 3-6 Months)

## 35%

of solution providers expect a **SIGNIFICANT IMPACT** to their **product resell** business; this will be the most challenged aspect for ALL SPs overall business

- Many believe investments will accelerate in WFH, cloud and security products but budgets for projects will be impacted in Q3/Q4
- Solution providers servicing small business and SMB clients (~50%) see greater risk

## 60%

of solution providers expect either **POSITIVE OR NO IMPACT** to their **managed services business**

- Many believe this situation will immediately accelerate the move to outsourced, managed and cloud-based solutions
- But, some customers will be challenged to pay their bills and afford new services

## 50%

expect **growth in their cloud business** even in these challenging times

## 23%

of solution providers expect a **SIGNIFICANT IMPACT** to their **project-based services business**

- “Close to the box” challenges with on-site access, and inability to forage for new projects were key reasons cited
- Strategic, longer terms projects appear to be unaffected for now



# Financial Implications Summary (Over the Next 3-6 Months)

## 55%

of solution providers expect a **NEGATIVE IMPACT** to their **cash flow**, but there are several major areas limiting the impact of this situation:

- Record Q1 revenue across the board
- Global government assistance (PPP and CARES (US), 80% workforce payments (EMEA), JobKeeper & CashBoost (AUS))
- Strong focus on accounts receivable and evaluation of nonessential expenses
- Vendor / distribution payment term accommodations

## 70%

of solution providers expect a **NEGATIVE IMPACT** to their **customer contracts and payments**

- MSPs stated most instances of concern primarily due to ongoing nature of contracts
- Customers in certain industries have stopped paying; or going out of business
- Solution providers generally are NOT able to float significant payment delays (or handle bankruptcies); will need help from vendors on product related terms

## #1

**Employee retention** was the # 1 concern for **VIRTUALLY all solution providers**

- These are people-based business; loss of employees = loss of their “offering”
- Layoffs/furlough are happening BUT targeted and selective
- Best solution providers are targeting to hire “potentially available” A-players



**M&A activity has mostly “paused”** in March/April (focus on shoring up the business)

- Buyers are expecting valuations to go down (for those under duress); Otherwise, valuations not necessarily going down
- “Operator-based” M&A activity may shift from strategic purchasing to “fire sale” emphasis
- M&A experts anticipate activity to start up again in the fall (strategic operated based); Private equity not taking the summer off

# Sales, Marketing and Pipeline Summary (Over the Next 3-6 Months)

## Q1

Q1 was on track to be a **RECORD** quarter for **VIRTUALLY all** solution providers

## 53%

of solution providers expect a **NEGATIVE IMPACT** to their **current quarter (Q2)**

- 73% of small partners expect negative impact while 25-35% expect it to be SIGNIFICANT

## 55-70%

of solution providers expect a **NEGATIVE IMPACT** to their ability to create **New Pipeline** but...

Impacts partner of all types, size and customer focus with the biggest impacts:

- Services oriented partners that rely on engagement to find new opportunities
- Solution providers that rely heavily on face-to-face interactions (very common in EMEA)
- Current marketing activities will NOT create the pipeline they need

## 20%

of solution providers see **opportunity to grow their pipeline**

- Driven by cloud, WFH, managed services and customer cost cutting



**Q3/Q4 is best described as uncertain**

# Technology Implications Summary *(Over the next 3-6 months)*

## ▶ WFH – Significantly positive

- Q1 was a boon; WFH was not common in many companies, industries and countries
- Initial demand was short lived (days/weeks) not months; future demand under consideration
- Significant demand expected in VDI, collaboration, bandwidth)

## ▶ Security – Significantly positive

- WFH hardening (multi-factor, training, policy management)
- Cloud security (Azure, AWS, GCP, SaaS)

## ▶ CLOUD- Positive impact

- WFH eroding barriers to cloud adoption
- Cost reductions and desire to move to OPEX model expected to accelerate
- Solution providers investigating cloud provider options and programs

## ▶ IT Infrastructure (Servers, storage, networking) – expected to be more negative than positive

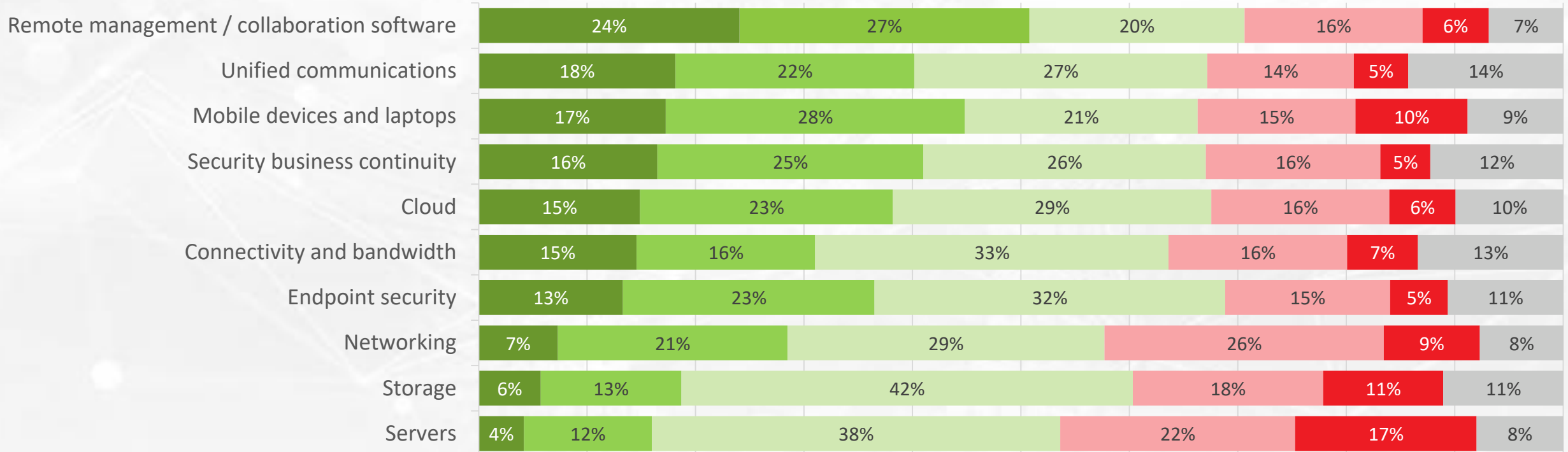
- Deals brought forward have diminished pipeline (replenishing pipeline is challenging)
- Anticipating supply chain constraints
- Accelerating cloud workload migrations

## ▶ Business Applications (ERP/CRM, etc.) – Mixed

- Core business applications operations are minimally affected
- Project services for implementation negatively impacted
- BUT longer term, strategic projects moving forward for now

# Channel Ecosystem at Large – Technology Segment Implications

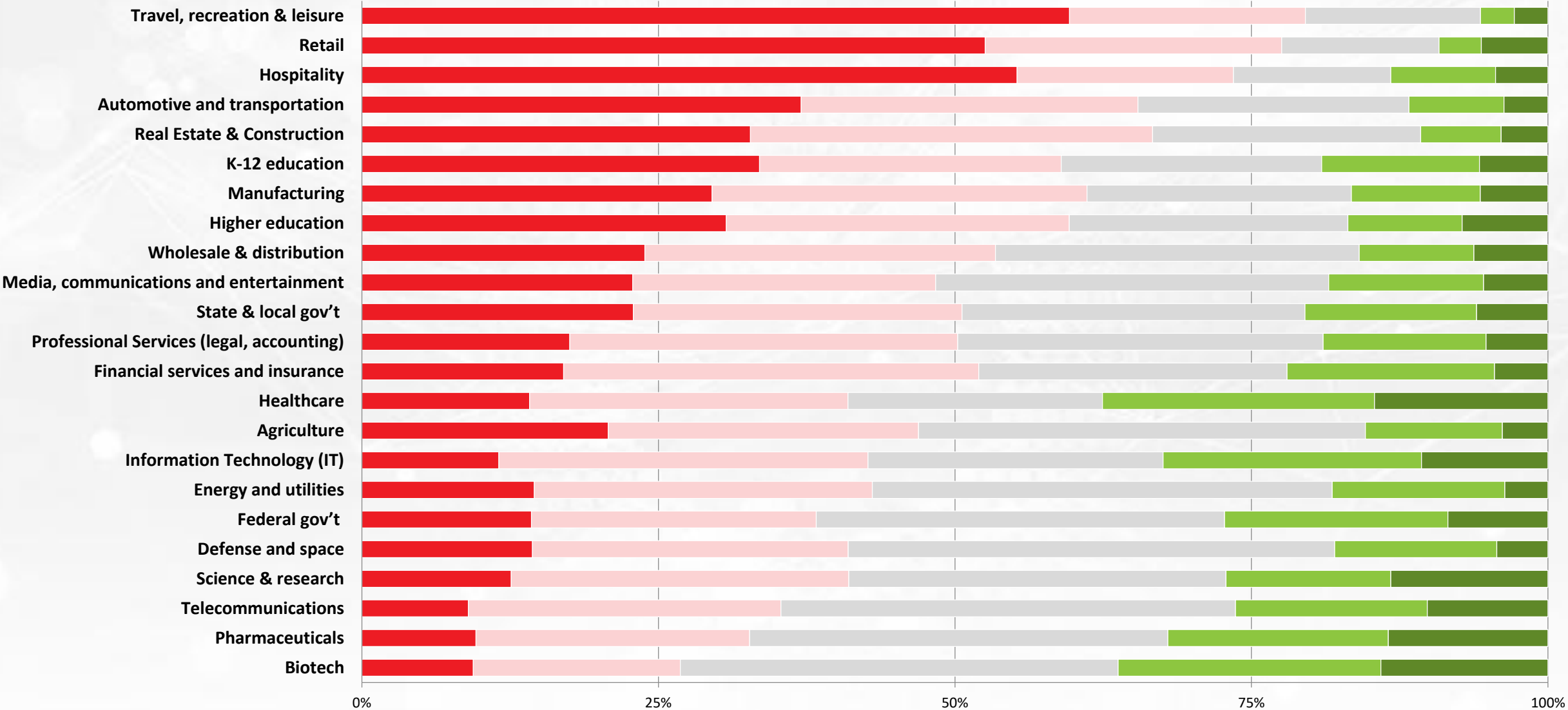
■ Significant Positive Impact    
 ■ Minimal Positive Impact    
 ■ No Impact    
 ■ Minimal Negative Impact    
 ■ Significant Negative Impact    
 ■ Dont know



## IPED Perspective

- All solutions supporting secure remote access for WFH experiencing large initial spike in March/April
- Supporting compute and storage capacity shifting dramatically to cloud deployments
- Dramatic expansion of collaboration tools and apps – focus is SaaS solutions; some SPs capitalizing on this to drive training revenue

# Channel Ecosystem at Large – Industry Segment Implications



# Contents

## Vendor Guidance

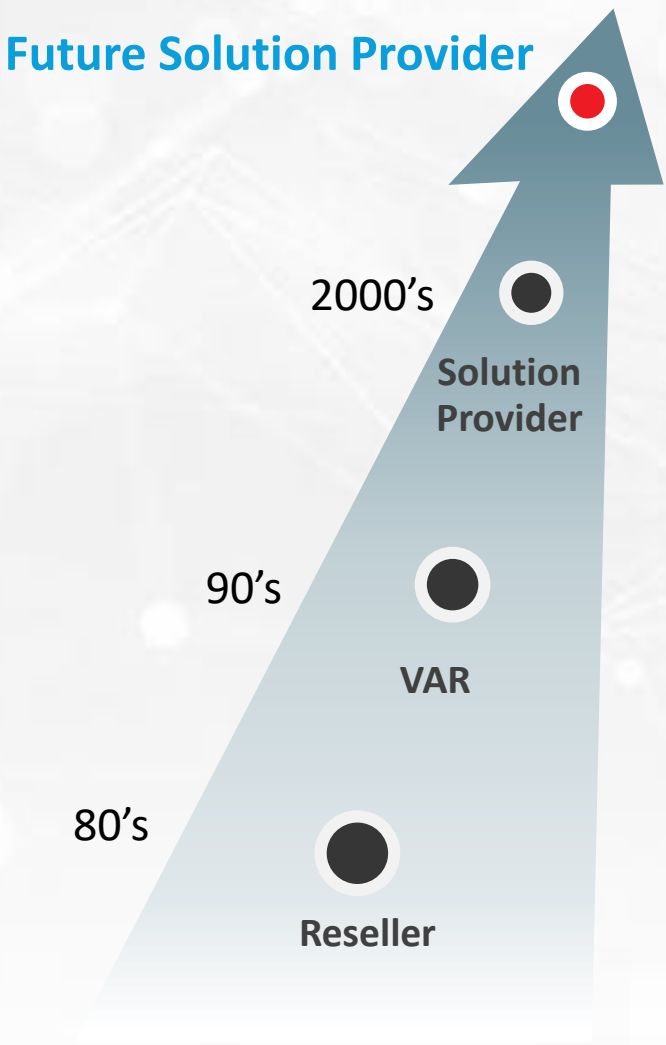


How vendors act today will determine the trajectory of their channel “relationships” for years to come?

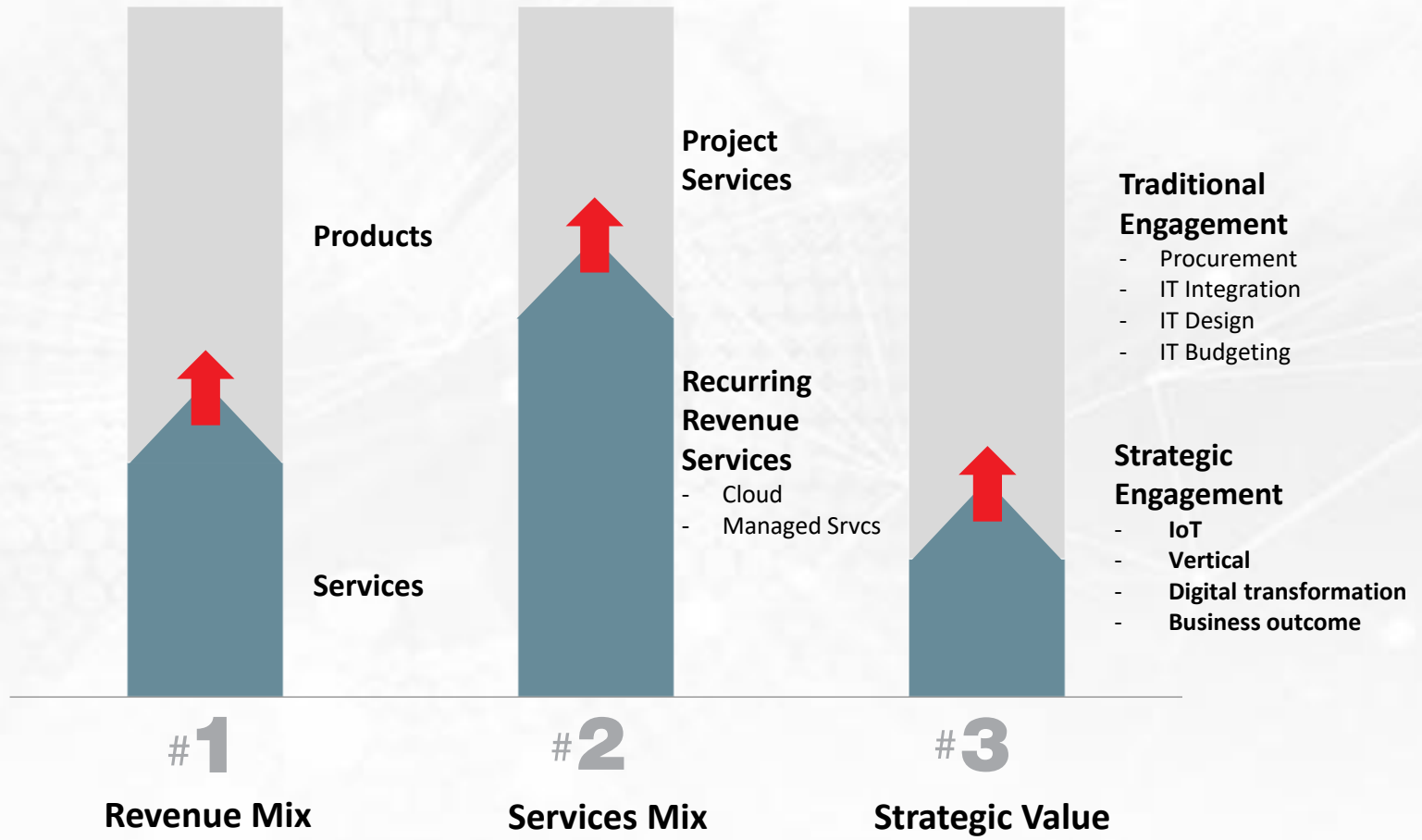


# The "IT Solution Provider" is evolving – **POST COVID-19 WILL accelerate this evolution**

The partner view...



## Strategic Business Direction



*accelerated transformation is now a business imperative, not a slow transition*

# What's Your Pandemic Partnering Strategy?

## Partner- Reactive

### Vendor Behaviors

#### Preserve Q2/Q3 pipeline

- Limited awareness to partner solvency & continuity risks
- Basic financing options
- Product bundles to address remote secure access needs

## Partner- Proactive

### Vendor Behaviors

#### Help partners weather the storm in 2020

- Financing to keep existing pipeline evolving
- Digital marketing support & funding
- Accelerated incentive funding and timing

## Partner-Centric

### Vendor Behaviors

#### Help partners build new skills and accelerate their transformation

- Business planning to define differentiation and build new IP
- Shift to MSP and cloud management capabilities
- Shift sales methodologies
- Build new sales & technical skills
- Foster P2P collaboration and match-making

Low

Vendor Impact & Strategic Channel Focus

High

*Transactional focus  
Today's offerings & services*

*Building strategic new capabilities  
Accelerating business transformation*





# Corona Virus COVID-19: What Should I Do?



**IPED**<sup>®</sup>  
Advice

“How Vendors act today will determine if they are our partner or simply another vendor for the next several years...”

“Vendors, you have the opportunity to **IMPACT** the future well-being of your partners...”  
– The IPED Team

Partner Business Transformations

Company Culture & Tone

Immediate Financial Issues





Marketing & Selling in Uncertain Times

Enablement & Training at a Distance

**Vendors Here  
In Partnership  
Against Covid-19**

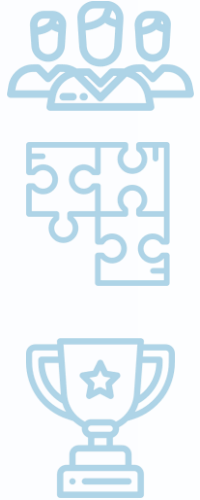
# Vendor Guidance – Immediate Considerations



<b>Company Culture</b>	Understand your company culture	<ul style="list-style-type: none"> <li>• Manage risk or leverage for gain your company’s Partner Culture: REACTIVE - PROACTIVE - CENTRIC</li> </ul>
 <b>Partner Business Transformations</b>	Communicate Post COVID vision	<ul style="list-style-type: none"> <li>• Post COVID vision is an absolute MUST - develop and communicate with market intelligence that shows go forward opportunities</li> </ul>
	Invest in Post COVID business recovery	<ul style="list-style-type: none"> <li>• Investigate / fund POST COVID operational recovery planning (business and operational level)</li> </ul>
	Re-educate YOUR staff	<ul style="list-style-type: none"> <li>• Educate CAMs / Sales – “how to manage your relationships today” (now is not the time for the hard close.. they need business as much as you do)</li> </ul>
 <b>Immediate Financial Issues</b>	Reinforce channel commitment	<ul style="list-style-type: none"> <li>• Consider commitment to shifting business to the channel .. if they go out of business this is your problem as well.</li> </ul>
	Automatically extend payment terms	<ul style="list-style-type: none"> <li>• Automatic extension of payment terms (90 days preferred)                         <ul style="list-style-type: none"> <li>• Hardware/upfront purchase</li> <li>• Software subscription / usage</li> </ul> </li> </ul>
	Segment your partner ecosystem	<ul style="list-style-type: none"> <li>• Segment partner ecosystem by critical industries and business model. Check financial health of critical partners.</li> </ul>
	Create M&A Match Making	<ul style="list-style-type: none"> <li>• There are some partners that will not survive and there are partners looking for opportunities</li> </ul>
	Do not ignore distribution support	<ul style="list-style-type: none"> <li>• Maintain distribution funded heads; solution providers are relying on them more than ever for communications, insights, etc.</li> </ul>
 <b>Marketing &amp; Selling in Uncertain Times</b>	Update insolvency terms	<ul style="list-style-type: none"> <li>• Add customer insolvency terms for all MRR / subscription contracts</li> </ul>
	Increase MDF% allocations	<ul style="list-style-type: none"> <li>• Increase MDF% allocations (75-100%), extend thru YE and direct to digital activities.</li> </ul>
	Extend trials/demos	<ul style="list-style-type: none"> <li>• Extend trials / access to demos to 6 months</li> </ul>
 <b>Enablement &amp; Training at a Distance</b>	Differentiated distance marketing	<ul style="list-style-type: none"> <li>• Conduct vendor/partner joint webinar / digital activates with guidance and/or concierge services</li> </ul>
	Provide FREE online training	<ul style="list-style-type: none"> <li>• Make training FREE now... they have time and are directing their staffs to use time to re-educate</li> </ul>
	Offer proactive technical mentoring/access	<ul style="list-style-type: none"> <li>• Provide proactive technical mentoring/access.....Post COVID technical certification mentoring (virtual)..again they have time and so do you</li> </ul>
	Share available talent pool	<ul style="list-style-type: none"> <li>• Provide mechanism for talent sharing across your ecosystem</li> </ul>

# This is a Once in a Lifetime Inflection Point in the Market

## This is Your Opportunity!



- ❑ **Lead Partners to Your Vision of the Future**
- ❑ **Invest People and Resources with Partners who Will Not Only Survive, but Thrive ...**
  - Segment your Partners, Conduct Health Checks, Re-invent Solutions
  - As in 2008, Partners with significant recurring revenue businesses are better positioned to invest with you
- ❑ **Partner Loyalty will be Forged Today**

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- ▶ **Our support includes follow on webinars and discussions with your team, the full Research Brief, new IPED Post Covid-19 Channel Offerings...**
- ▶ **We're here to help!**

# COVID-19 Channel Impact Study

THANK YOU

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# COVID-19 Channel Impact Study

## Appendix: Supplemental Materials

- ▶ Vendor Programs
- ▶ Distribution Insights
- ▶ WFH Technology Samples

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# Contents

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## Vendor Programs for

- ▶ Partners
- ▶ Customers
- ▶ Community Support

Distributor Announcements

Vendor Work from Home

Product Positioning Samples



## Vendor Programs for

- ▶ **Partners**
- ▶ Customers
- ▶ Community Support

Distributor Announcements

Vendor Work from Home

Product Positioning Samples



# Vendor Programs for Partners Snapshot ... Details Next Page



90 day payment terms, short term rentals, \$2B in financing support



\$10.2M in partner financing support, legal support, Covid Stimulus SBA PPP support



Selected free training & cloud credits



90 day payments, relaxed tiering, flat rate incentives



Virtual training, discounts and extended certification test windows



100% Q2 MDF, extended tiering levels, free 90 SW trials, distributor incentives



Extended MDF timeline & incentive enhancements, financing terms, free training



Free cybersecurity support & training, financing, relaxed partner compensation



Free training, bootcamp & support









180-day deferred payments, free certification, extended partner levels



180 day deferred payments, payment plans, consumption models, trials



# Vendor Programs for Partners - Page 1

	Announcement	Description	Link
	\$2B in financing and new programs.	<ul style="list-style-type: none"> <li>• 1%/mo through 2020; regular payments 1/1/21</li> <li>• 90-day delayed payment for new deals</li> <li>• Short-term rentals</li> </ul>	<a href="#">Click Here HPE</a>
	Free access to on-line training & cloud credits	<ul style="list-style-type: none"> <li>• Access to on-line learning and certifications - Developers</li> <li>• 3 mos of credits to cover Oracle cloud infrastructure costs - Startups</li> </ul>	<a href="#">Click Here Oracle</a>
	Virtual training, discounts & extended cert testing	<ul style="list-style-type: none"> <li>• Expanded virtual trainings</li> <li>• Digital learning discounts; flexible cancellations</li> <li>• Extended exam window; training units</li> </ul>	<a href="#">Click Here Redhat</a>
	MDF, incentive enhancements, financing terms, free training	<ul style="list-style-type: none"> <li>• One-time, 50% Up-front MDF payout; extend unspent MDF</li> <li>• Extended payment terms</li> <li>• Free Services Deployment training; UnityXT, VxRail, DP440</li> <li>• Removal of 1H'21 growth targets w/ increased base rates (Distributors)</li> </ul>	<a href="#">Click Here Dell</a>
	Complimentary support and training	<ul style="list-style-type: none"> <li>• Qlik Continuous Classroom trainings for free</li> <li>• Free Data Analytics bootcamp webinars</li> <li>• Extended 24x7 support to ALL partners</li> </ul>	<a href="#">Click Here Qlik</a>
	Financial assistance; free DaaS trial & certification exams	<ul style="list-style-type: none"> <li>• 180-day deferred payment; customized payment plans; consumption payment models</li> <li>• Through May 31, 2020; contact Distributor for eligibility</li> <li>• Free trial of XiFrame</li> </ul>	<a href="#">Click Here Nutanix</a>

# Vendor Programs for Partners - Page 2



Announcement	Description	Details
\$10.5M in legal, business and financial assistance	<ul style="list-style-type: none"> <li>• Legal/business guidance for PPP application process</li> <li>• TruMethods training – Manage &amp; Grow through this Crisis</li> <li>• Customized renewals &amp; financing options</li> </ul>	<a href="#">Click Here Kaseya</a>



Financial and program offerings with Intel, Microsoft & DLL	<ul style="list-style-type: none"> <li>• Flat-rate incentives/30 day payments vs 90 day</li> <li>• 90 day extended terms</li> <li>• Relaxed tier criteria</li> </ul>	
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Financing options, free training, partner program adjustments	<ul style="list-style-type: none"> <li>• Defer payments 180 days; 0% interest</li> <li>• Free certification training; Specializations, Cloud, Wireless</li> <li>• Current partner levels valid through 2020</li> </ul>	<a href="#">Click Here Extreme</a>
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Adapting partner program, increasing incentives and business resources	<ul style="list-style-type: none"> <li>• Extend existing partner’s level to 1/1/21</li> <li>• Additional time to submit co-marketing plans</li> <li>• Millions of dollars added to incentive portfolio-Distributors</li> <li>• Increased Q2 incentives for Power &amp; Storage partners</li> <li>• No-cost, 90-day SW trials</li> <li>• 100% funding for Q2, digital co-marketing programs</li> </ul>	<a href="#">Click Here IBM</a>
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Incentive, free support & training	<ul style="list-style-type: none"> <li>• Financing &amp; leasing options for Customers</li> <li>• Incentives/relaxed compensation models for Partners</li> <li>• Free access to cybersecurity support &amp; on-demand training</li> </ul>	<a href="#">Click Here HPI</a>
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## Vendor Programs for

- ▶ Partners
- ▶ **Customers**
- ▶ Community Support

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# Vendors Programs for Customers ... Details Next Page



No service termination, late payment fees, free hotspots



Free product bundles for schools, healthcare, municipalities and not-for-profit



Open access to Ariba, hosting marketplace



Training, HR tools & 90 day Oracle Cloud credits



Free O365 for teams 180 days



120-day product trials



Red Hat

Training units, virtual training, discounts, extended test windows



\$2B in financing 90 day terms, 1% financing to 2021.



\$50M in secure connectivity bundles for clinics, testing sites, hospitals



Free O365 protection, cloud archiving and apps



90 day terms, 1% financing to 2021



Free eLearning, CAD to schools, Vuforia until June



Free training & data analytics bootcamp, 24x7 support



Financial offerings








WFH free appliances & licenses through May 31









0 Interest, 180 day terms, free training

# Vendor Programs for Customers – Page 1

	Announcement	Description	Details
	60-day program to 'Keep Americans Connected'	<ul style="list-style-type: none"> <li>No termination of service (mobile, home, broadband)</li> <li>Waive late payment fees</li> <li>Keep public Wi-Fi spots open for general public Residential &amp; small business Customers</li> </ul>	<a href="#">Click Here ATT</a>
	Free access to on-line training & HR tools; cloud credits	<ul style="list-style-type: none"> <li>Access to on-line learning and certifications</li> <li>Access to <a href="#">Workforce Health and Safety</a> solution</li> <li>3 mos of credits to cover Oracle cloud infrastructure costs</li> </ul>	<a href="#">Click Here Oracle</a>
 Red Hat	Enhanced/flexible training and certification	<ul style="list-style-type: none"> <li>Expanded virtual trainings</li> <li>Digital learning discounts; flexible cancellations</li> </ul>	<a href="#">Click Here Redhat</a>
COHESITY	Free software and cloud storage	<ul style="list-style-type: none"> <li>Free protection for Office 365</li> <li>1-yr, 20TB free cloud archiving</li> <li>Remote data management apps</li> </ul>	<a href="#">Click Here Cohesity</a>
	Complimentary support and training	<ul style="list-style-type: none"> <li>Qlik Continuous Classroom trainings for free</li> <li>Free Data Analytics bootcamp webinars</li> <li>Extended 24x7 support to ALL customers and partners</li> </ul>	<a href="#">Click Here Qlik</a>
	Financing options; free training	<ul style="list-style-type: none"> <li>Defer payments 180 days; 0% interest</li> </ul>	<a href="#">Click Here Extreme</a>

# Vendor Programs for Customers – Page 2

	Announcement	Description	Details
	Free emergency remote work kits through June	<ul style="list-style-type: none"> <li>• Work kits include:               <ul style="list-style-type: none"> <li>○ GoToMeeting, GoToWebinar, GoToMyPC</li> <li>○ LogMeIn Pro</li> <li>○ RescueAssist</li> </ul> </li> <li>• Schools, healthcare, municipalities, non-profits</li> </ul>	<a href="#">Click Here LogMeIn Kits</a>
	Free O365 trial	<ul style="list-style-type: none"> <li>• 6-month Office 365 E1, including Microsoft Teams</li> <li>• Available through MSFT rep or Partner</li> </ul>	<a href="#">Click Here O365 Trial</a>
	\$2B in financing and new programs.	<ul style="list-style-type: none"> <li>• 1%/mo through 2020; regular payments 1/1/21</li> <li>• 90-day delayed payment for new deals</li> <li>• Short-term rentals</li> </ul>	<a href="#">Click Here HPE</a>
	\$2.5B; defer 95% of payments until 2021	<ul style="list-style-type: none"> <li>• 90-day delayed payment for new deals</li> <li>• Includes all HW, SW, Services</li> <li>• 1%/mo through 2020; regular payments 1/1/21</li> <li>• Available through Partners</li> </ul>	<a href="#">Click Here Cisco</a>
	Financial offerings	<ul style="list-style-type: none"> <li>• Financing &amp; leasing options for Customers</li> <li>• Free access to cybersecurity support &amp; on-demand training</li> </ul>	<a href="#">Click Here HPI</a>
	\$9B in financing programs	<ul style="list-style-type: none"> <li>• 0% interest rates for infrastructure solutions</li> <li>• 180-day payment deferral</li> <li>• Remote work/learning: 6 to 12-month terms/refresh options</li> </ul>	<a href="#">Click Here Dell</a>

# Vendor Programs for Customers - Page 3



Announcement	Description	Details
Open access to Ariba Discovery B2B e-commerce solution	<ul style="list-style-type: none"> <li>Buyers and suppliers can collaborate on business transactions</li> <li>Buyers can post their immediate sourcing needs</li> <li>4M Suppliers can respond to show they can deliver</li> <li>Free to post, free to respond; no fees until 6/30/20</li> </ul>	<a href="#">Click Here SAP</a>
120-day product trials; up to 250 users	<ul style="list-style-type: none"> <li><a href="#">AuthPoint</a> Multi-factor Authentication</li> <li><a href="#">DNSWatchGO</a> remote user security</li> <li>Available through WatchGuard or Partner</li> </ul>	<a href="#">Click Here Watchguard</a>
\$50M in products - secure connectivity bundles	<ul style="list-style-type: none"> <li>Pop-up clinics, testing sites, temporary hospital facilities</li> <li><a href="#">Two bundles being offered:</a> <ul style="list-style-type: none"> <li>Small site extension from existing network</li> <li>Large site location</li> </ul> </li> </ul>	<a href="#">Click Here Aruba</a>
Free products & eLearning courses	<ul style="list-style-type: none"> <li>Vuforia Chalk available through June 30th.</li> <li>Onshape SaaS CAD Solution available to schools</li> <li>Free access to online courses</li> </ul>	<a href="#">Click Here PTC</a>
Special 'Work-from-Home' promotions through May 31	<ul style="list-style-type: none"> <li>Enterprise – Free SMA 8200v VPN appliance</li> <li>SMB - Free SMA 500v VPN appliance</li> <li>30 &amp; 60-day spike licenses for SMA 100 &amp; 1000 series</li> </ul>	<a href="#">Click Here Sonicwall</a>



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# Vendors Programs for Community Support ... Details Next Page



Free first responder smartphones & services in conjunction with FirstNet



\$335M for WHO, UN Foundations, non profits, etc.



Touchless innovation, 3D printing to donate face shields



Donation matching, equipment donations, COVID19 research support



Funding for relief efforts and research








\$5M grants for SMB businesses





Free Secure Wi-Fi

# Vendor Programs for Community Support – Page 1

Announcement	Description	Target	Link
 Free smartphones & services in conjunction with FirstNet	<ul style="list-style-type: none"> <li>Free smartphones (First responders)</li> <li>3 mos free service (nurses &amp; doctors)</li> <li>Priority coverage/connectivity</li> </ul>	First Responders Health Care Workers	<a href="#">Click Here ATT</a>
 \$335M for WHO, UN Foundations, non profits, etc.	<ul style="list-style-type: none"> <li>Supporting UN Foundations, WHO, etc</li> <li>\$5M in grants to non-profit organizations</li> <li>Support for Silicon Valley specific organizations</li> </ul>	Global organizations Local organizations	<a href="#">Click Here Cisco</a>
 Touchless innovation, 3D printing to donate face shields	<ul style="list-style-type: none"> <li>Developed a <a href="#">touchless tool</a> ; helps medical workers avoid contact with surfaces</li> <li>Using manufacturing and 3D printing expertise to produce 360K reusable <a href="#">face shields</a> face shields; donated to hospitals</li> </ul>	Healthcare providers	<a href="#">Click Here Eaton</a>
 Donation matching, equipment donations, COVID19 research support	<ul style="list-style-type: none"> <li>Global and Bay Area donation matching</li> <li>Equipment donations to California hospitals</li> <li>Supercomputing SW &amp; support for researchers combatting COVID19</li> </ul>	Various global/local organizations	<a href="#">Click Here HPE</a>
 \$5M grants for SMB businesses	<ul style="list-style-type: none"> <li>\$10K grants; 2-50 employees; \$250k-\$2m revenue</li> <li>\$3m to US companies; \$2m to RoW companies</li> </ul>	Small business	<a href="#">Click Here SFDC</a>

# Vendor Programs for Community Support – Page 2

Announcement	Description	Target	Link
 <p>Funding for relief efforts and research</p>	<ul style="list-style-type: none"> <li>\$10M to global &amp; local COVID19 relief efforts</li> <li>\$50M <a href="#">Pandemic Response Technology Initiative</a> towards patient care, scientific research; access to on-line learning for teachers &amp; students</li> </ul>	Various global/local organizations	<a href="#">Click Here Intel</a>
 <p>Free Secure Wi-Fi</p>	<ul style="list-style-type: none"> <li>Secure wireless kit available for temporary COVID-19 testing facilities</li> <li>Includes Mist access points, SRX 320 w/FW/UTM</li> </ul>	Locations in US, Canada & UK	<a href="#">Click Here Juniper</a>

Autodesk, Box, DocuSign, Cisco, Dropbox, GitHub, Intuit, LinkedIn, NetApp, Okta, PagerDuty, Palo Alto Networks, Pledge 1%, Postmates, Pure Storage, Salesforce, SAP, ServiceNow, Silicon Valley Bank, Slack, SurveyMonkey, Twilio, Workday, Zoom Video Communications and Zuora



Bay Area Companies Distribute \$22M in Funding through CDC Foundation, United Nations Foundation and the Silicon Valley Community Foundation in Response to the COVID-19 Crisis

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## **Distributor Announcements**

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# Distributor Announcements

Distributors have created similar global Business Continuity/Crisis Management Programs which include a list of actions to support their Employees, Solutions Providers and Vendors.

- ▶ Temporary work-from-home programs except logistics/warehouse
- ▶ Offices closed to all visitors; logistics facilities operational w/adjustments
- ▶ Suspended business-related travel and F2F meetings
- ▶ Cancelled on-site events and attendance at outside events
- ▶ Increased health precautions policies and programs; increased cleaning for all facilities
- ▶ Managing supply chain issues with Vendors; increasing inventory; accelerate orders
- ▶ Provide Solution Providers with financing that enables them to maintain their business
- ▶ Availability of distributor-specific cloud and operations platforms
- ▶ Supplemental technical and educational support capacity
- ▶ Customized product bundles



# Additional Distributor Announcements: Global Technology Distribution Council (GTDC)

## GTDC Member News

- [Household Appliances in the National Fight Against COVID-19 from the AB Group](#)
- [Ingram Micro Adds Two Financing Offers to Fuel Deals During Coronavirus Slowdown](#)
- [How Resellers Can Manage Cashflow in Unprecedented Times](#)
- [Dice: Tech Industries Faring Better Than Others During Pandemic](#)
- [Tech Data Boosts Capacity at Configuration Centre](#)
- [D&H Launches Virtual SMB VAR Engagement to Inform 280+ Vendors on Needs During COVID-19](#)
- [Almo Financial Relief Alliance Expands Program To Support Home Appliance Dealers](#)
- [Arrow Works on Ventilator Project, Looks to Boost Virus Testing](#)
- [Exclusive Networks Sets Up Coronavirus Support Hub](#)
- [Connectivity for Temporary Medical Locations](#)
- [Bloom Energy to Refurbish Out-Of-Warranty Ventilators, Almo Corporation to Distribute](#)
- [Tarsus Supply Chain Update](#)
- [Westcon-Comstor '100% Operational' in Face of COVID-19](#)
- [Distributors Rally to Support Partners During Pandemic](#)
- [SYNNEX Rapidly Responding to Unprecedented Challenges of COVID-19](#)
- [Providing Secure Remote Access with Free Cisco Security Offerings](#)

## Frank Perspectives



**Frank Vitagliano**  
CEO, GTDC

[Frank Vitagliano Bio](#)

### Taking Care of Business Takes on New Meaning

Change has always been constant in the technology world, down to every channel dimension we know. Familiar forms of “normal,” on the other hand, may now be less recognizable in certain respects, if not altered forever.

That’s not altogether a bad thing. No one wants to compromise getting back healthy and *staying* that way. Forging ahead will be both art and science in the aftermath and lingering effects of COVID-19.

[Read More](#)

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# Technology – Work From Home (WFH) Related

Technology	Description	Link
	<ul style="list-style-type: none"> <li>• Ready-to-deploy VDI Solutions on HPE ProLiant Servers, HPE Synergy Servers &amp; HPE SimpliVity (HCI) for VMware and Citrix environments</li> <li>• Seamless and secure access to corporate resources with Aruba Remote Access Points (RAP's) or Aruba VIA VPN access for single or multiple clients</li> </ul>	<a href="#">Click Here HPE VDI</a>
	<ul style="list-style-type: none"> <li>• Business continuity options including:               <ul style="list-style-type: none"> <li>○ <a href="#">Remote PC Access</a> - log into physical Windows office PC using virtually any device</li> <li>○ <a href="#">Citrix Managed Desktops</a> - use cloud to host business continuity environment; hosted in Microsoft Azure</li> </ul> </li> </ul>	<a href="#">Click Here Citrix</a>
	<ul style="list-style-type: none"> <li>• <a href="#">Flexible Security Solutions</a> including:               <ul style="list-style-type: none"> <li>○ <a href="#">Remote Workforce Security Solutions</a>: Access vulnerability &amp; information security assessments</li> <li>○ <a href="#">Rapid Monitoring Deployment Services</a> : Managed detection &amp; response solution</li> </ul> </li> </ul>	<a href="#">Click Here Secureworks</a>
	<ul style="list-style-type: none"> <li>• FortiGate appliance aggregates and terminates 4X more concurrent VPN connections with no additional hardware or licensing investments.</li> <li>• FortiClient software installed on both business and personal devices to create encrypted VPN connections to the enterprise network.</li> <li>• Secure SD-WAN provides remote access services to branch workers into the organization's internal and cloud resources with no additional hardware or licensing investments.</li> </ul>	<a href="#">Click Here Fortinet</a>



# Technology – Work From Home (WFH) Related

Technology	Description	Link
 <p>Video Conferencing/ UC</p>	<ul style="list-style-type: none"> <li>Expanded integrations with <a href="#">Microsoft Teams</a> , <a href="#">Docebo</a> &amp; plug-ins for O365 &amp; Google Calendar</li> <li>Audio improvements with noise suppression and better adaption to network condition</li> <li>Additional security capabilities such as secure content sharing, meetinglock/PW-protected meetings, and security compliance features.</li> </ul>	<p><a href="#">Click Here LogMeIn</a></p>
 <p>Video Conferencing/ UC</p>	<ul style="list-style-type: none"> <li><a href="#">Best practices</a> on enabling effective remote work including:               <ul style="list-style-type: none"> <li>User ID &amp; access, MFA, Endpoint Manager, O365 (now MS365), Teams, LOB applications, service monitoring</li> </ul> </li> </ul>	<p><a href="#">Click Here Microsoft</a></p>
 <p>Networking</p>	<ul style="list-style-type: none"> <li>Virtual Office – end-to-end solution for WFH locations</li> <li>Voice, video, wireless &amp; data applications in secure environment</li> <li>Enabled on Cisco IOS Software-based CPE routers (1000 &amp; 800 Series ISRs)</li> </ul>	<p><a href="#">Click Here Cisco</a></p>

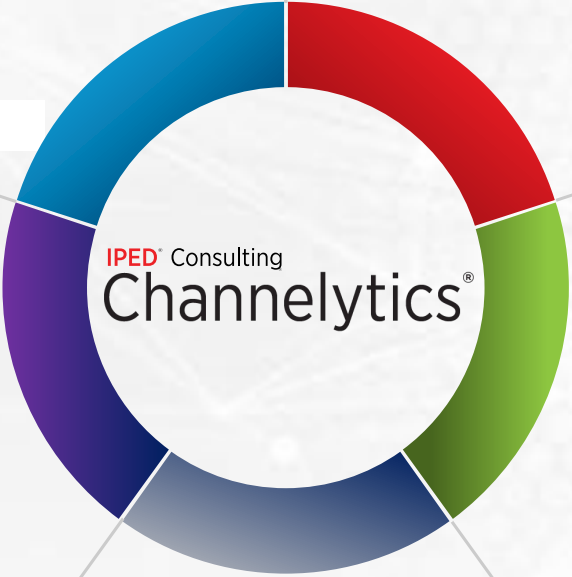
# Channelytics<sup>®</sup>

## PARTNER DATABASES

SP500  
MPS500  
+More Lists & Awards

## RESEARCH

Market Intelligence  
Trending Data  
Vendor Imperatives



## ADVISORY

Research Readouts  
Inquiry Appointments  
Executive Briefings

## INSIGHTS

Expert Perspectives  
Proven Practices  
Operational Guidance

## TOOL SETS

Frameworks & Guides  
Playbooks & Templates  
Channel Primers

# Actionable Intelligence to Grow your Channel

- ✓ Research on topics at the forefront of the channel
- ✓ Actionable insights to fully leverage the data
- ✓ Playbooks and tools for quicker execution
- ✓ Advisory services tailored to your objectives
- ✓ Executive communities to network and collaborate

Vendor Programs & Benchmarks	Partner Marketing	Partner Profitability
Public Cloud Platform Providers	Managed Services	Channel Census
Channel Account Management	Route to Market Playbooks	Professional Services
App Development Services	Partner Enablement	Subscriber Request

**Please contact us if you need help or would like to set up advisory session or live webinar for your team!**

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