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XPAND Activation Guide

Tips and steps to kick start demand generation in XPAND

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What is XPAND?

XPAND is our demand center designed for Nutanix partners. It is a launch pad to drive your Nutanix digital marketing strategy, augment your brand, and increase sales pipeline.

Features include:

- Customizable campaigns
- Social syndication
- Banners and microsites
- Downloadable content
- Analytics and reporting

How do I log into XPAND?

Navigate to https://my.zift123.com/#/login

If you need to register for an account, email xpand@nutanix.com

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Quick tips before you get started:

1. Have your logo, color scheme and company contact information ready.
   - You'll need these to personalize XPAND assets.
   - Your logo will appear on most design features.
   - Once you customize your first asset, XPAND will remember these settings!
2. Verify who is your XPAND administrator.
   - The admin can only access certain features. Email xpand@nutanix.com to find out who is your admin.
3. Upload a contact list first: this will streamline email marketing activation.
   - Don't worry – your data is safe. Nutanix will never share or modify your contact lists.
4. Connect your CRM.
   - Pull in lists, simplify lead reporting, automate lead sharing back into your CRM.
   - This is a faster and easier alternative to uploading individual contact lists.
5. Check XTRIBE for marketeer challenges on XPAND.
   - We want to reward you for XPANDing!
6. If you need help, reach out to xpand@nutanix.com
   - Alternatively, research the self-support portal.

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Activating various capabilities

Update Company Profile Settings

Your company profile in XPAND

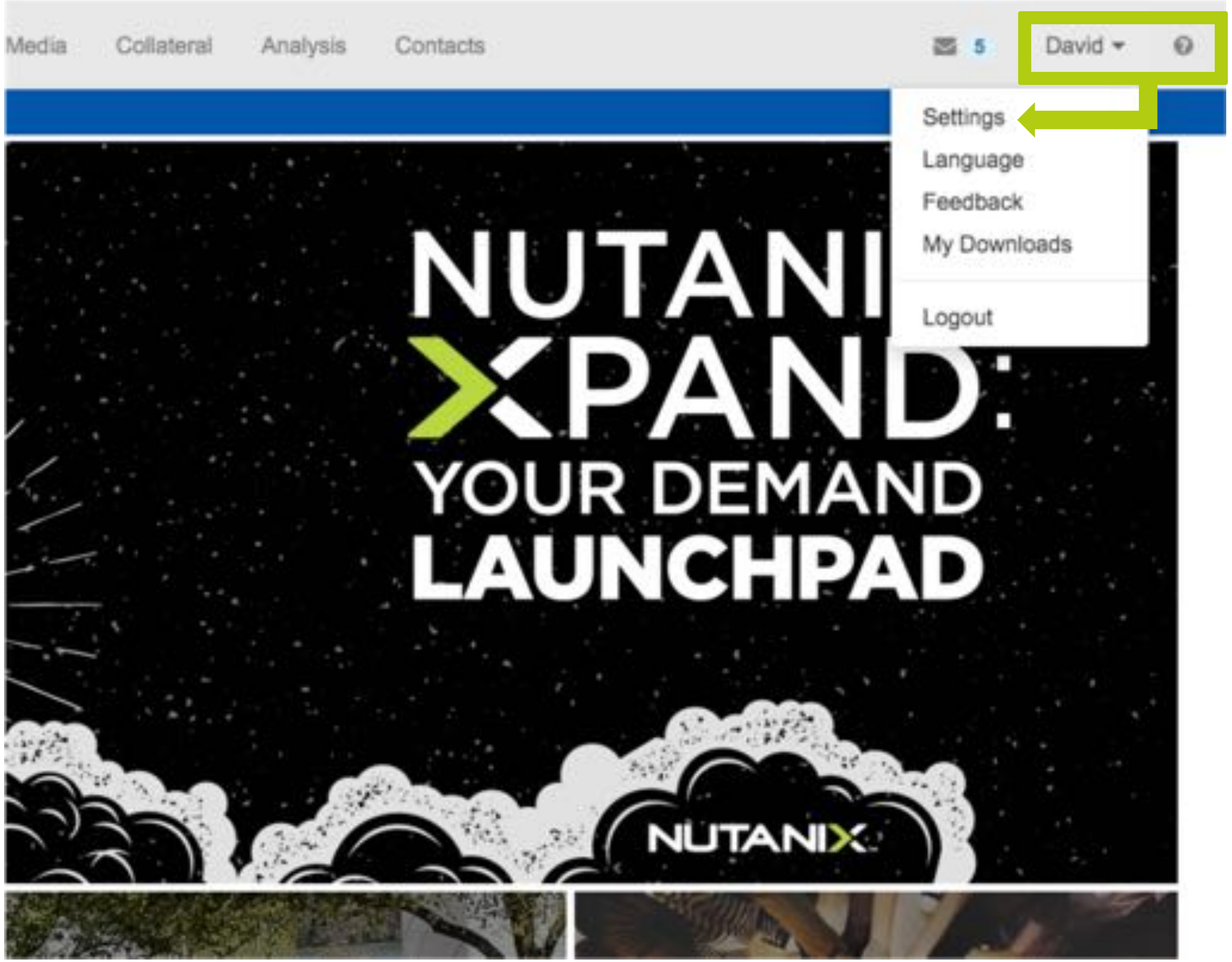
Updating your company profile allows you to:

- Streamline customization of assets in the future including your address and contact information
- Designate your preferred language preference (for communication purposes)
- Set email authorization and suppression list preferences

How to update your company profile (#1)

1. Click the drop down next to your name.

2. Navigate to ‘Settings’.



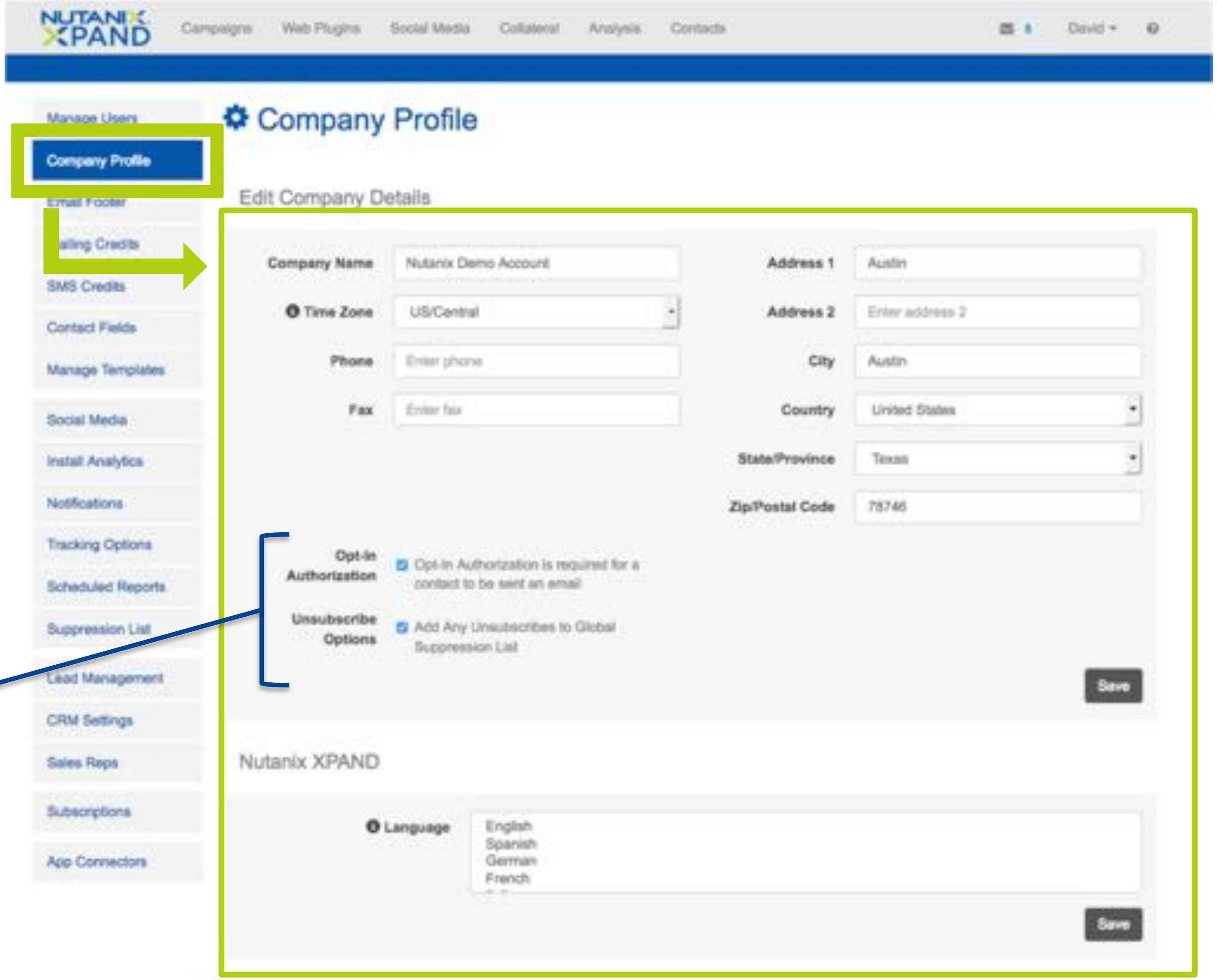
How to update your company profile (#2)

3. Navigate to 'Company Profile'.

4. Update the information outlined in green.

Tip:

- 'Opt-In Authorization': Sends an email asking partner to opt-in to your XPAND emails. Good for newly added cold lists.
- 'Unsubscribe Options': Adds all unsubscribed contacts to your global suppression list **(recommended)**. If the contact is mistakenly uploaded again, XPAND knows to suppress it.



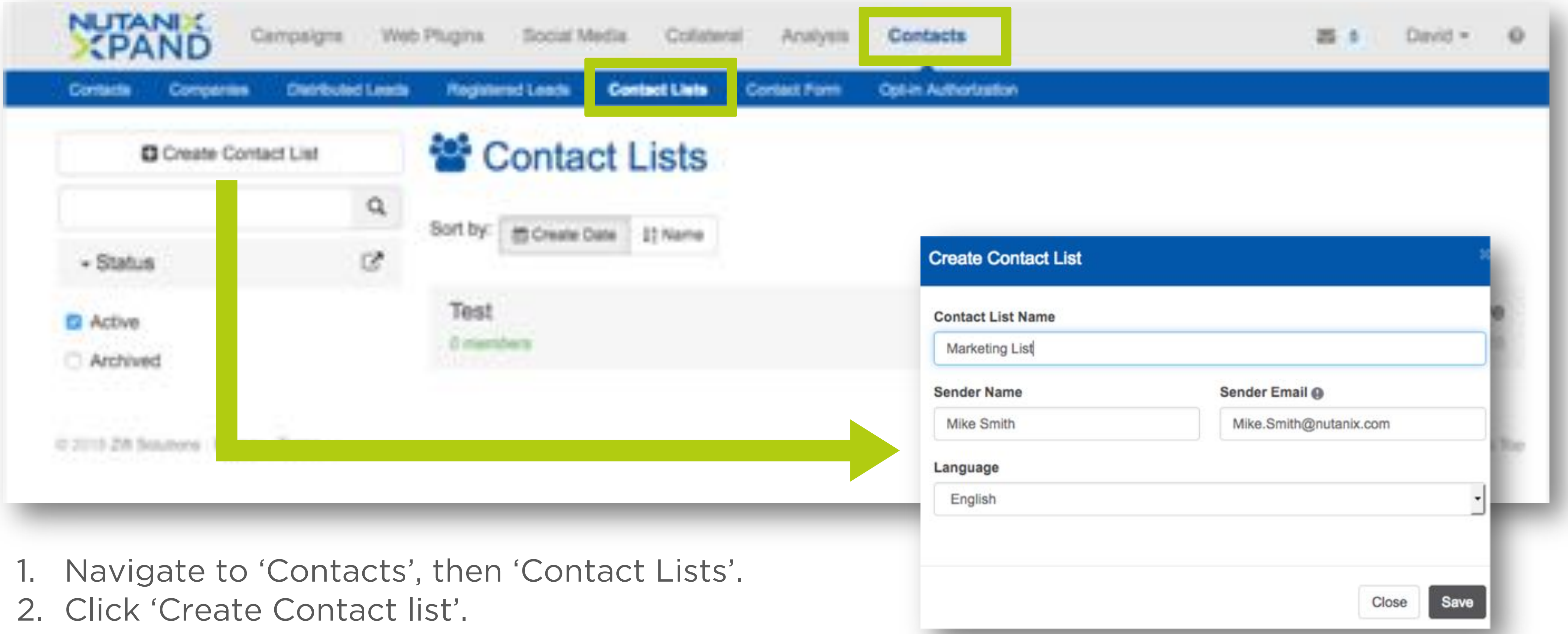
Uploading a Contact List

Contact lists in XPAND

Uploading a list to XPAND is required before sending any email workflow. Here are some things to note:

- All lists require columns for first name, last name, email, and company name per contact. You can also add addresses, phone numbers, titles and other information.
- If submitting a bulk upload, acceptable file formats include XLS, XLSX, TXT, or CSV.
- Nutanix will not share or modify any customer information that belongs to you.

Uploading a contact list (#1)



1. Navigate to ‘Contacts’, then ‘Contact Lists’.
2. Click ‘Create Contact list’.
3. Name the list and include the sender information.
4. Click ‘Save’.

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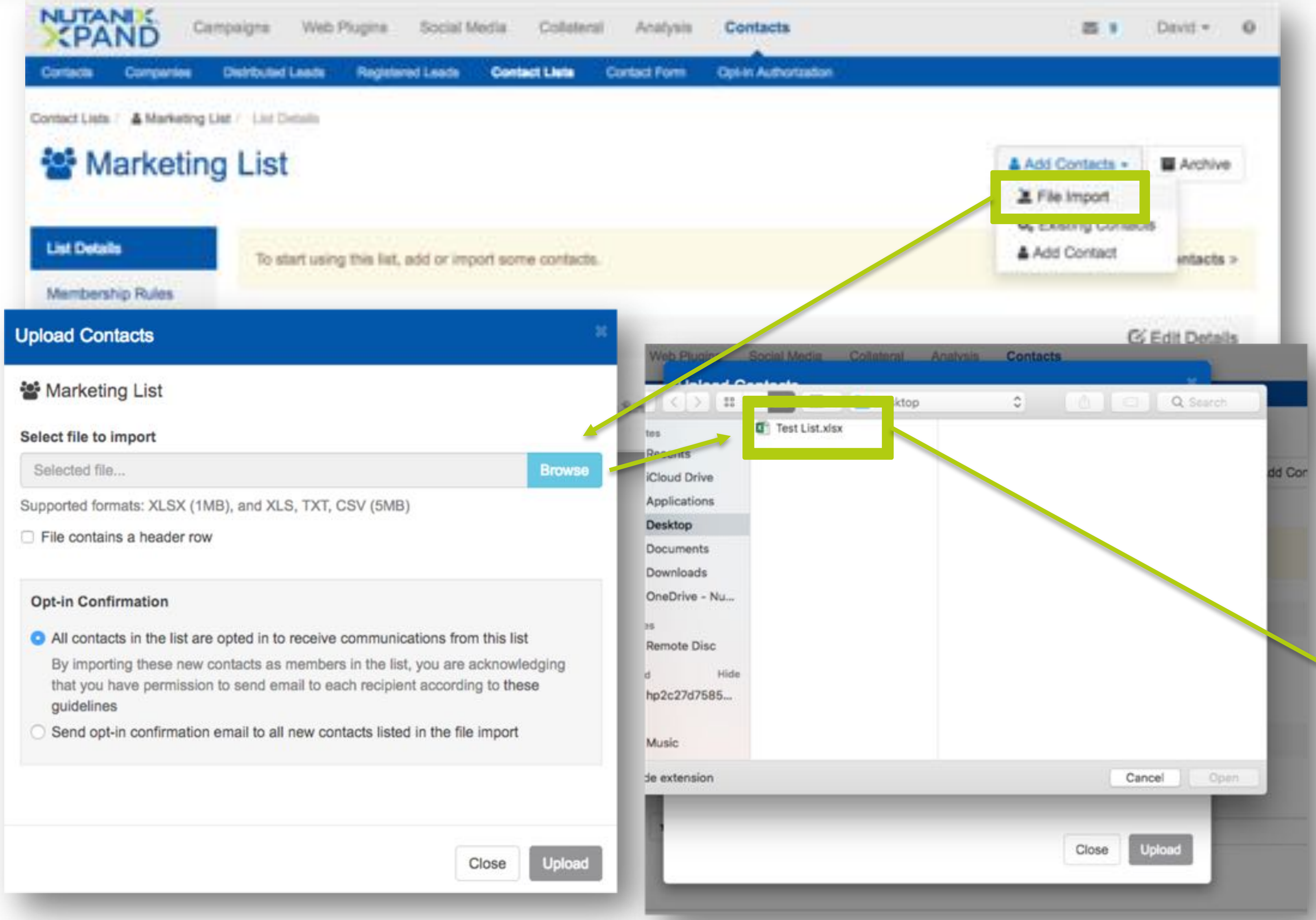
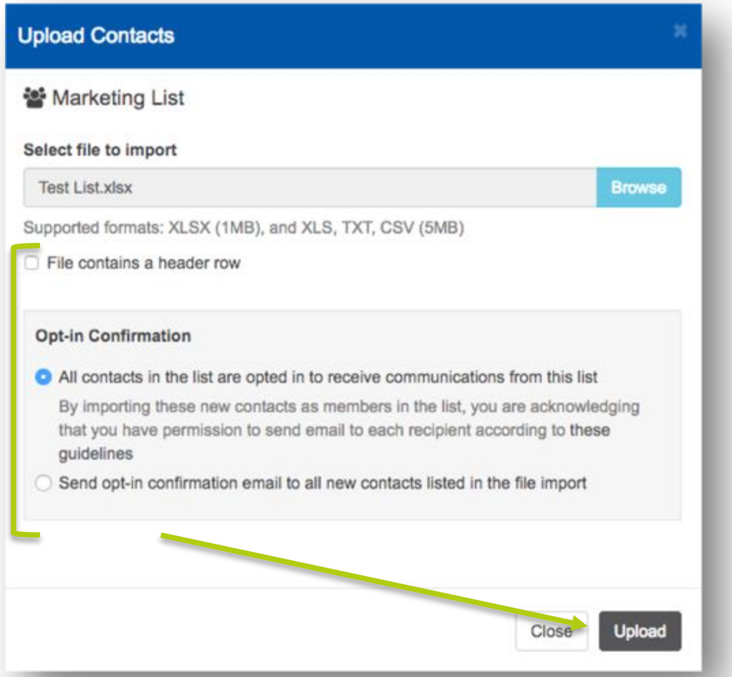
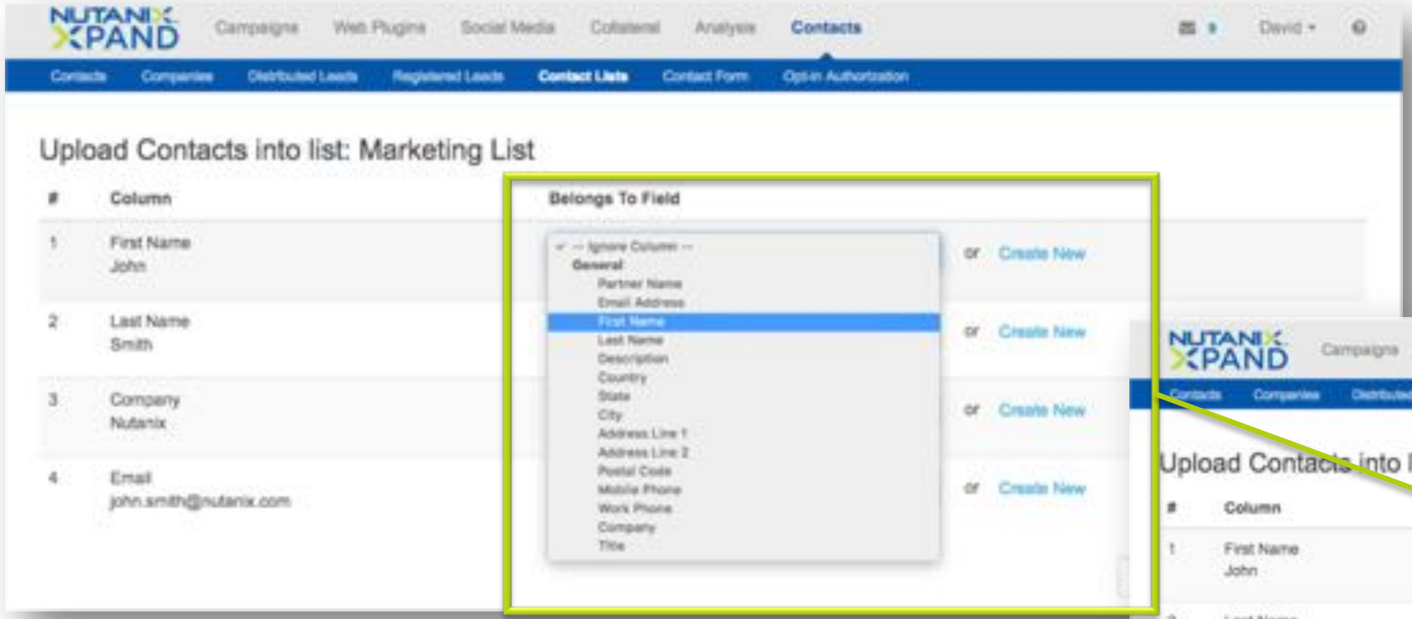
Uploading a contact list (#2)

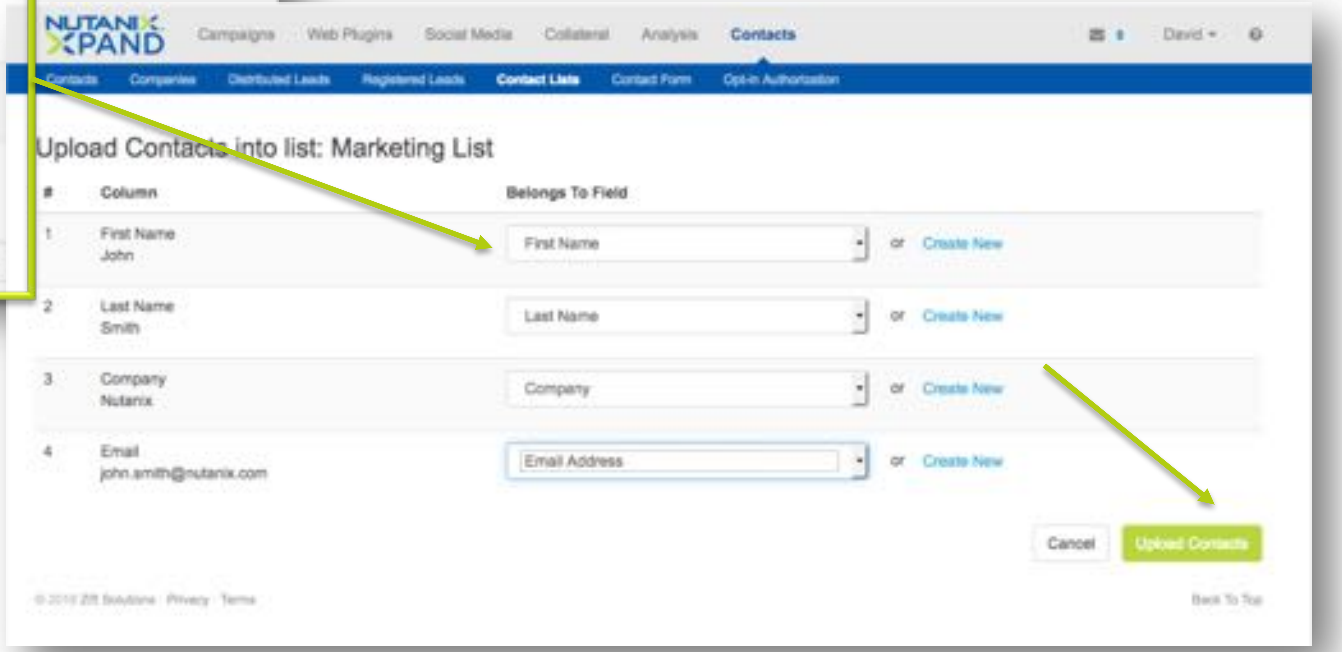


4. Click ‘File Import’ from the ‘Add Contacts’ dropdown.
5. Click ‘Browse’.
6. Search for your list.
7. Designate if the first row has header names and confirm opt-in authorizations.
8. Click ‘Upload’.



Uploading a contact list (#3)





9. Associate the column in your spreadsheet with XPAND's contact naming conventions. Create a custom field by selecting 'Create New'.

10. When done, click 'Upload Contacts'.

You can now use this list for your XPAND marketing purposes!

Connecting Your CRM

Connecting your CRM in XPAND

Streamline your marketing and sales efforts by integrating your own CRM with XPAND.

- With this integration, your XPAND contacts and sales data will seamlessly flow from XPAND to your CRM, making it easy to track pipeline.
- You can also pull contact lists from your CRM into XPAND, making marketing execution a breeze.
- Supported CRMs include Salesforce, Microsoft Dynamics, SageCRM, Zoho, Sugar and SalesLink.

Syncing your CRM (#1)

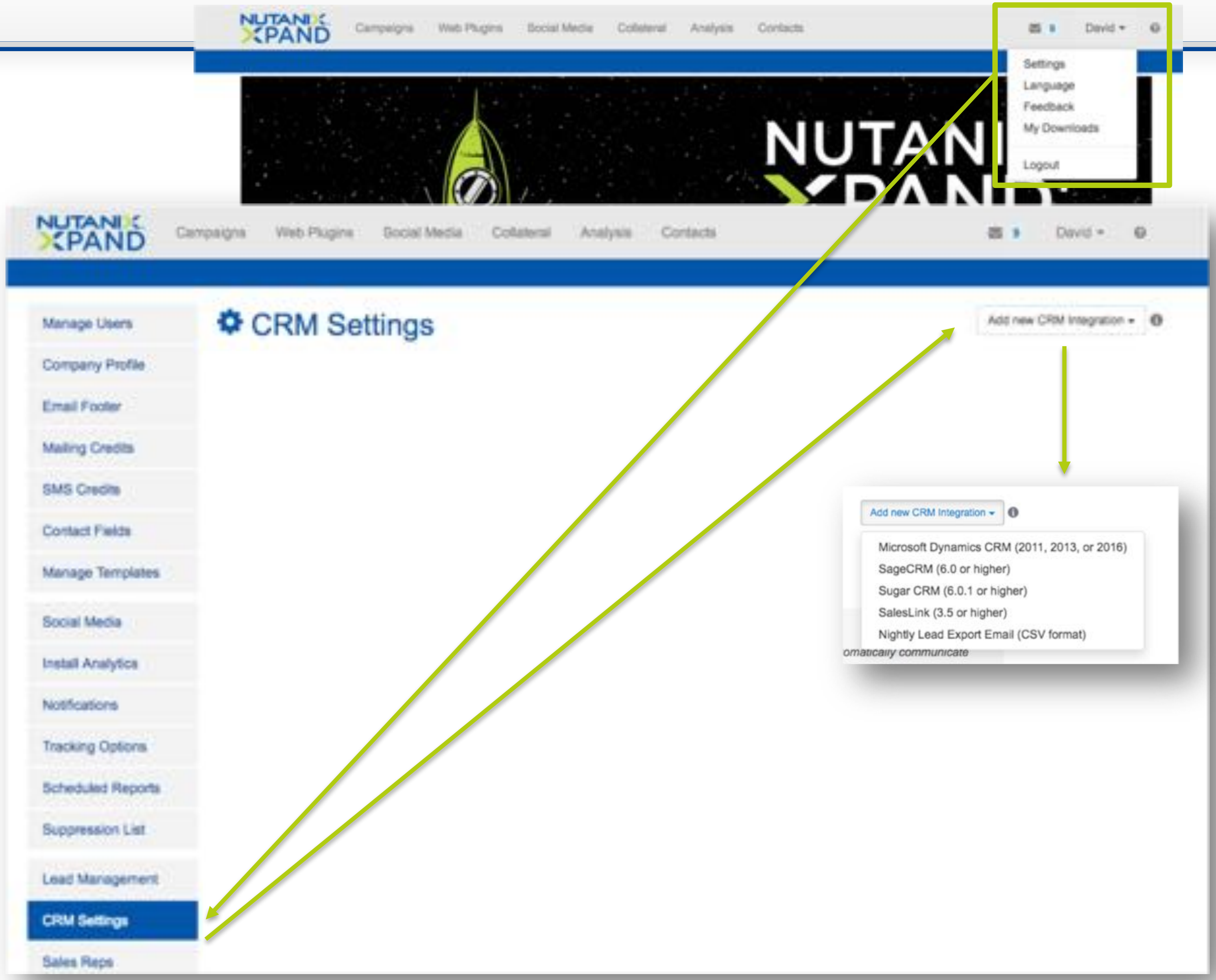
1. Have your XPAND administrator log into XPAND. If you're unsure who your administrator is, reach out to support: xpand@nutanix.com.

2. Find the dropdown next to your name in the top right corner.

3. Click 'Settings'.

4. Scroll down to 'CRM Settings'.

5. In the top right corner, click 'Add new CRM integration'.



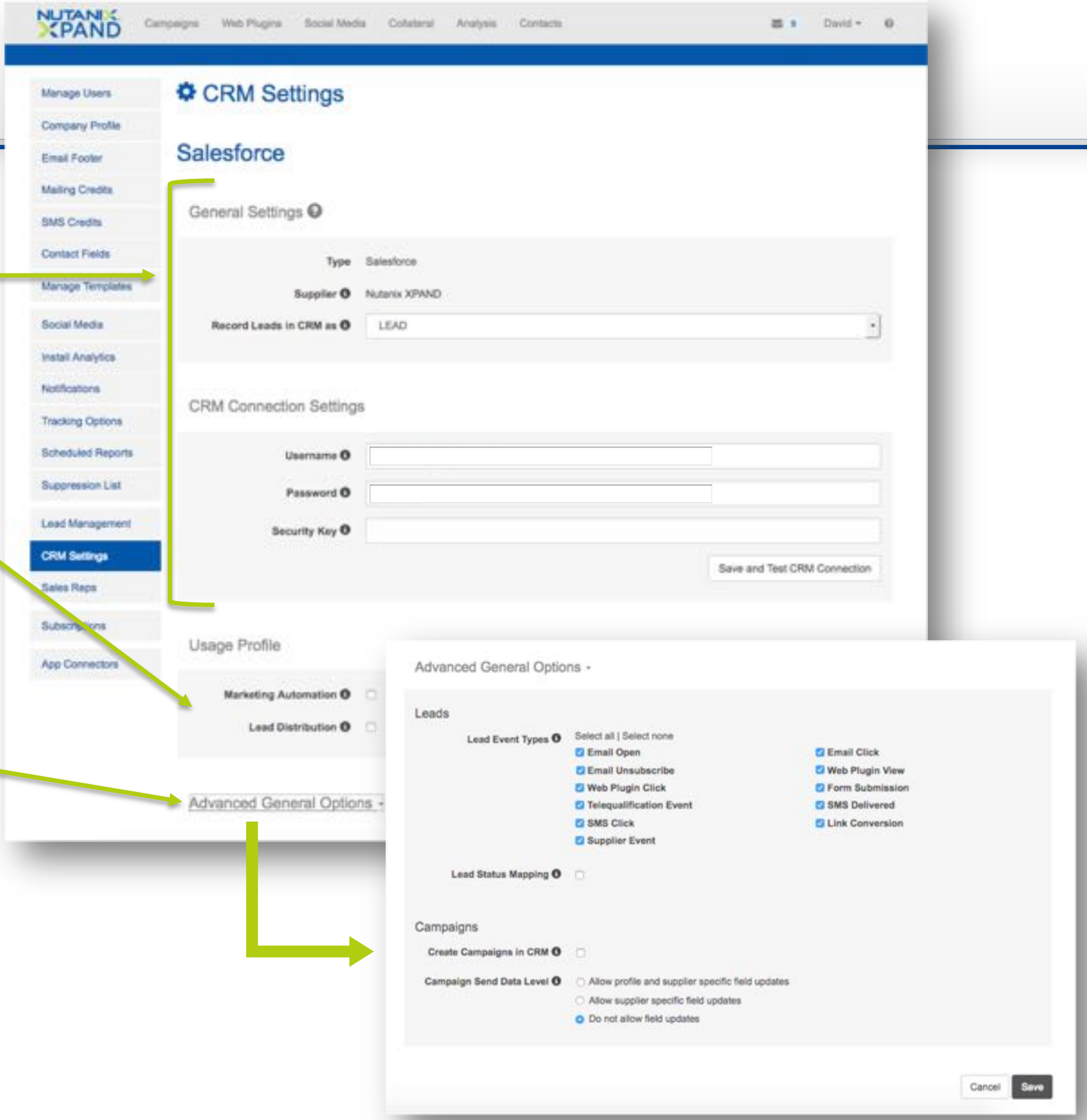
Syncing your CRM (#2)

6. A new screen will open and ask you to enter various details including your CRM credentials and connection settings.

The ‘Usage Profile’ determines how your data flows between XPAND and your CRM. Hover over the ‘i’ icon for more information. We recommend checking both boxes.

In the ‘Advanced General Options’ dropdown, specify how contacts are shared based on lead types, lead mapping fields and campaign information.

7. When done, click ‘Save’. Your CRM is now integrated!



Contact Segmentation with Membership Rules

Segmenting contacts with Membership Rules

Membership Rules organize inbound traffic and segment contacts for outbound campaigns. Filter through XPAND's CRM with rule logic and automatically add contracts to different groups based on your criteria. These groups are called *Dynamic Membership Lists.*

- Segment existing contact lists and target them with new outbound marketing campaigns.
- Or, capture new inbound contacts and automatically segment contacts into lists.

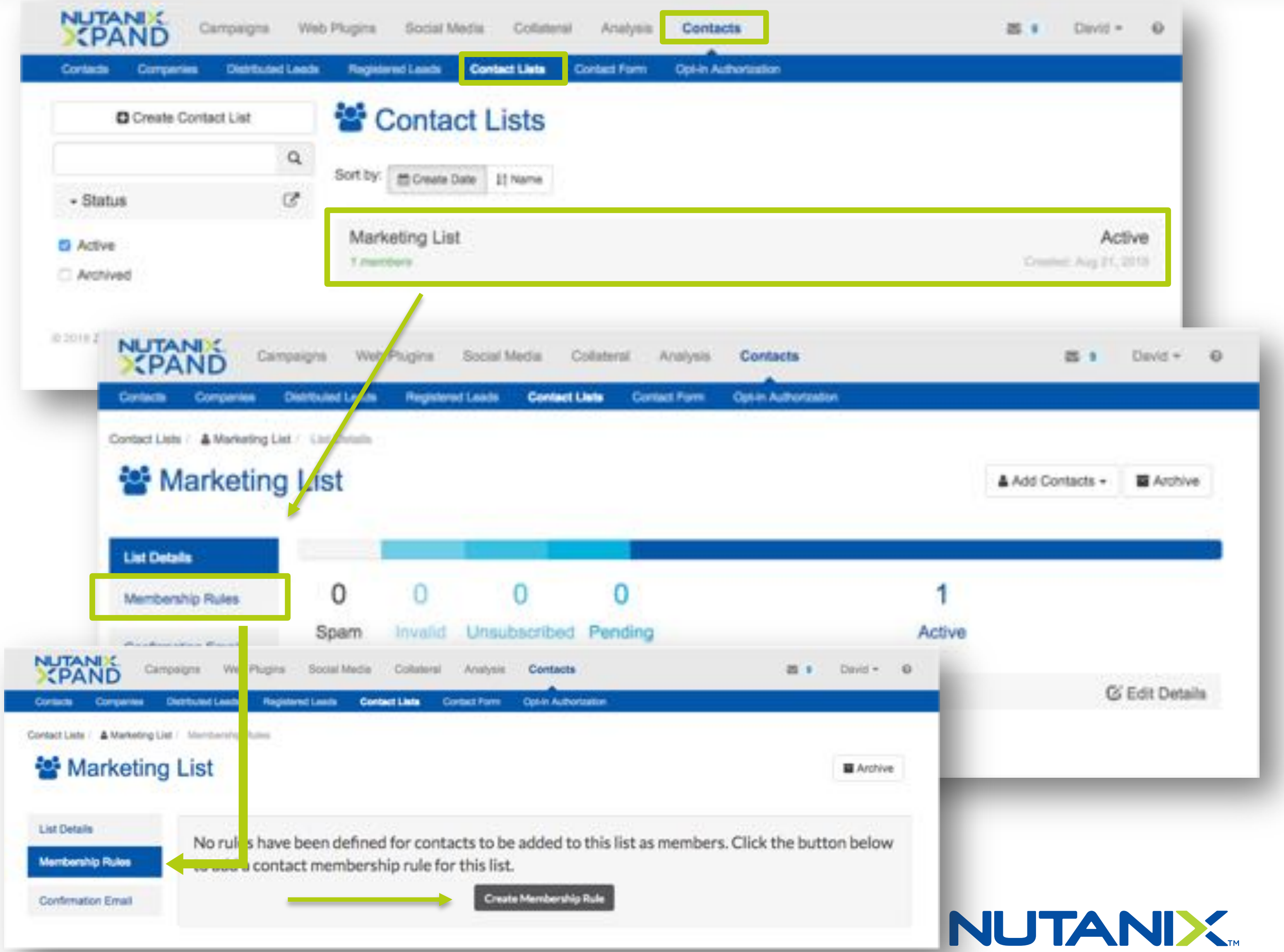
Segment existing contacts for new campaigns (#1)

1. Navigate to ‘Contacts’ and then ‘Contact Lists’.

2. To segment existing contacts, click on an existing list. This will take you to the list snapshot.

3. Select ‘Membership Rules’, then ‘Create Membership Rules’.

4. Matching fields will then appear.



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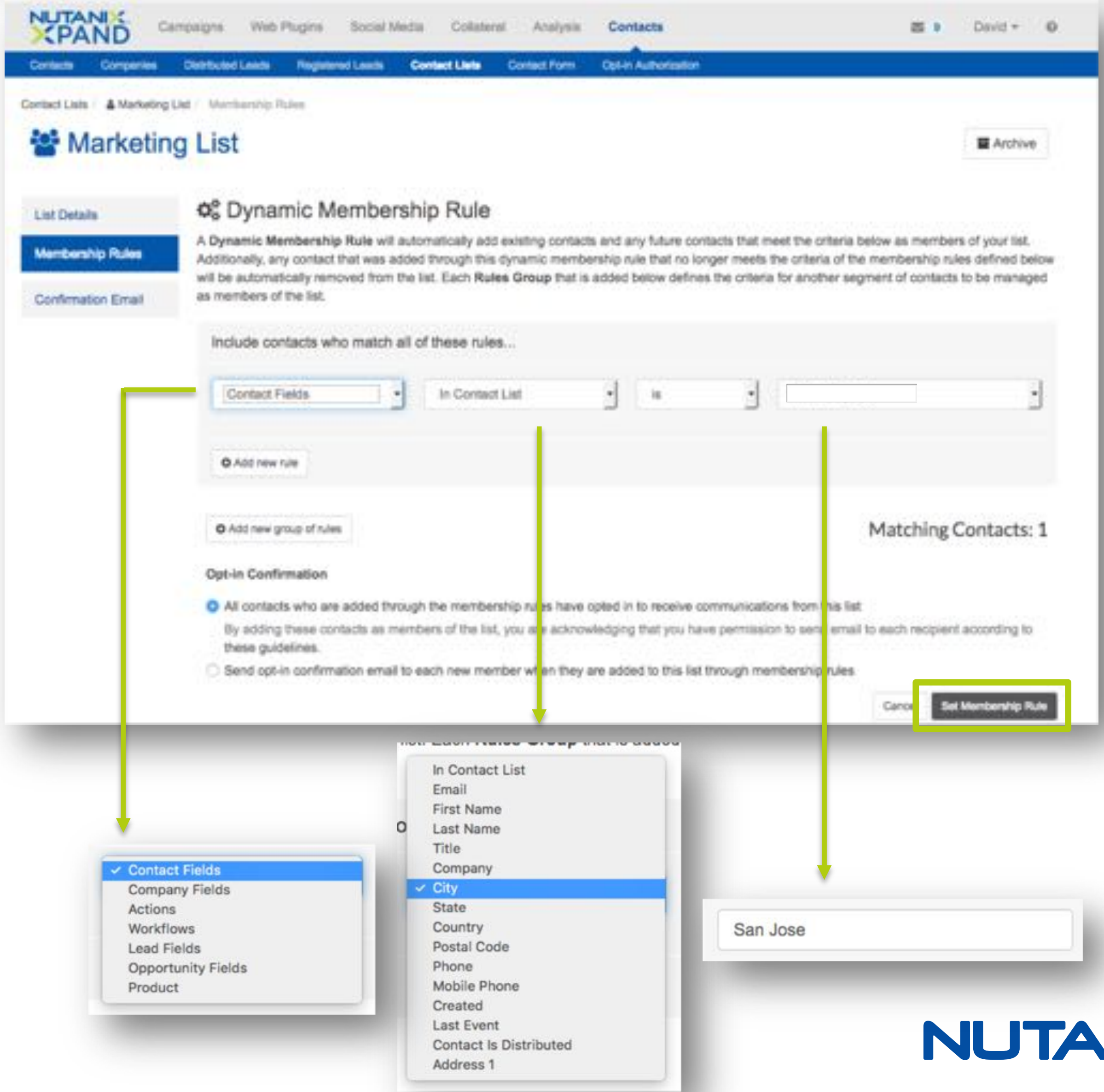
Segment existing contacts for new campaigns (#2)

5. Using the dropdowns, select the criteria that best relates to your target market. For example, if you wish to target contacts in a certain city, select ‘Contact Fields’ + ‘City’ is ‘San Jose’. This will then filter all contacts who fit those parameters.

6. Then select ‘Set Membership Rule’.

7. Next time you go to execute an email, this Membership Rule will be available in the email wizard. In addition, any new contacts that meet these criteria will automatically be added to the list.



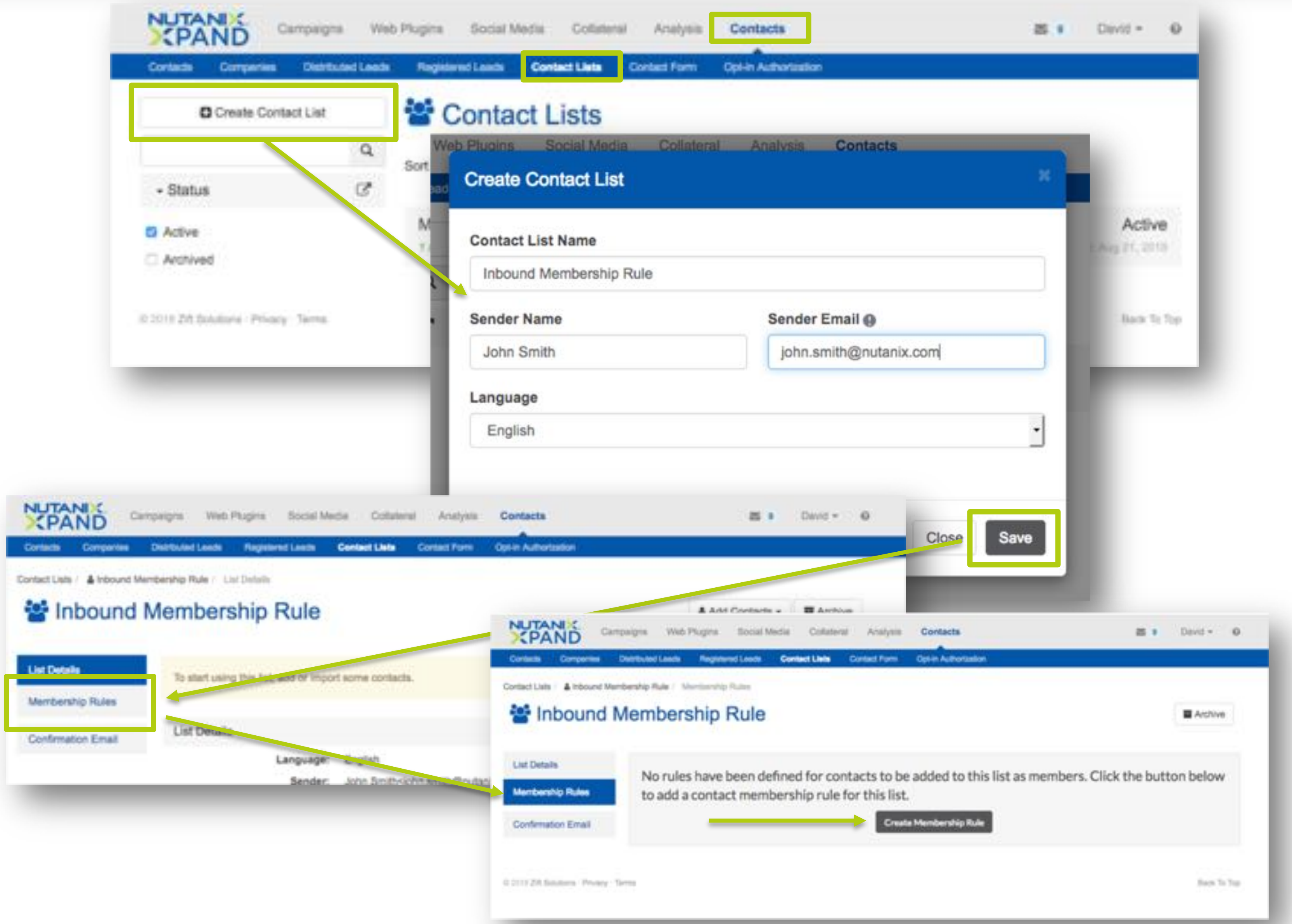
Segment new inbound leads (#1)

1. To automatically set Membership Rules for inbound leads, click ‘Contacts’, ‘Contact Lists’ and then ‘Create Contact List’.

2. Name your list and choose a sender name and email. Then, click ‘Save’.

3. This will take you to the snapshot. Select ‘Membership Rules’.

4. Then, select ‘Create Membership Rule’.



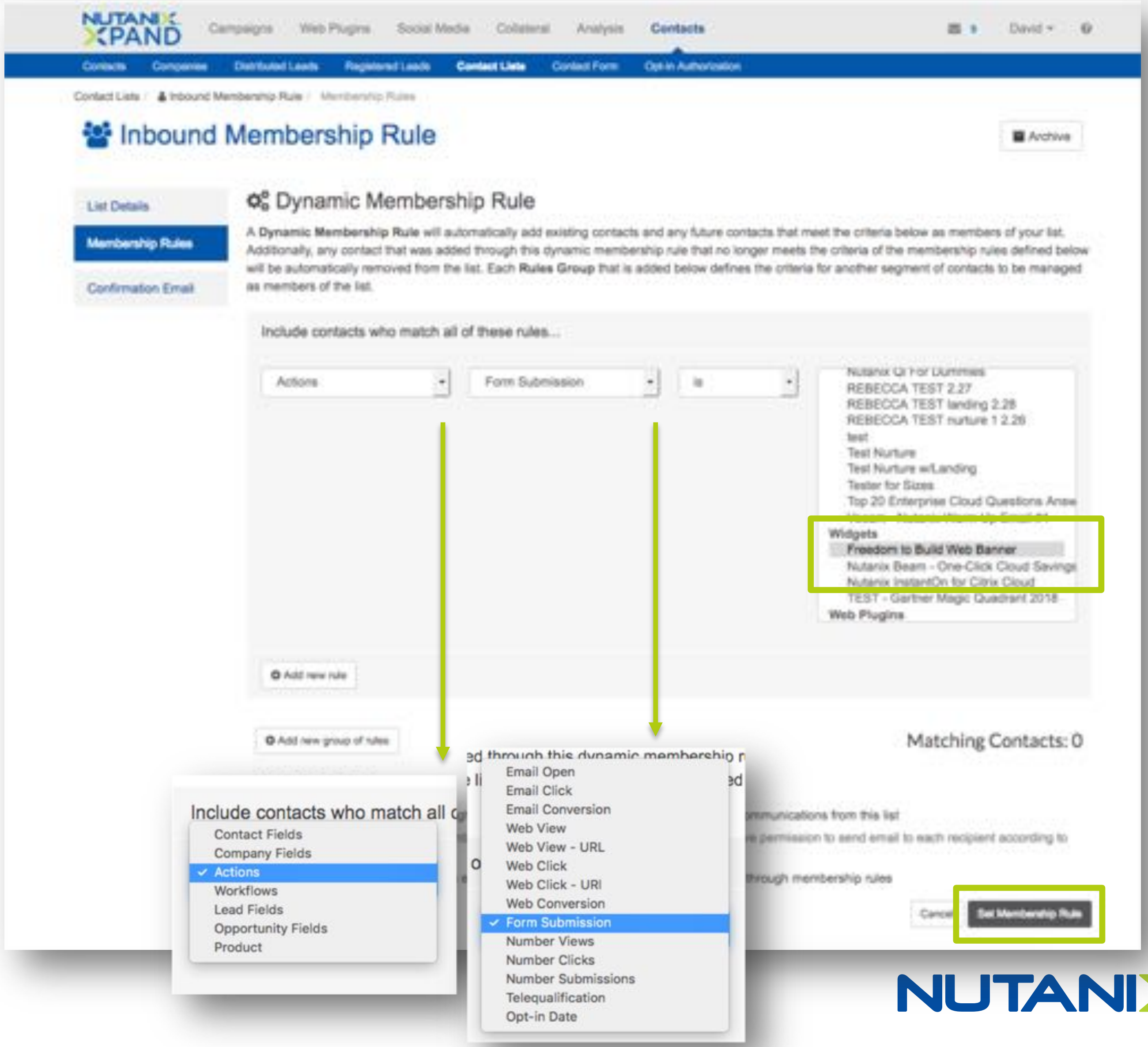
Segment new inbound leads (#1)

5. Using the dropdowns, select the criteria that best relates to your target market.

For example, if you wish to target contacts who complete a form field via a microsite, select ‘Action’ + ‘Form Submission’ is [the name of the Microsite] collecting the leads.

6. When done, click ‘Set Membership Rule.’

Inbound contacts will now be added to Dynamic Membership Lists as they interact with your marketing. Use this list for new nurture campaigns.



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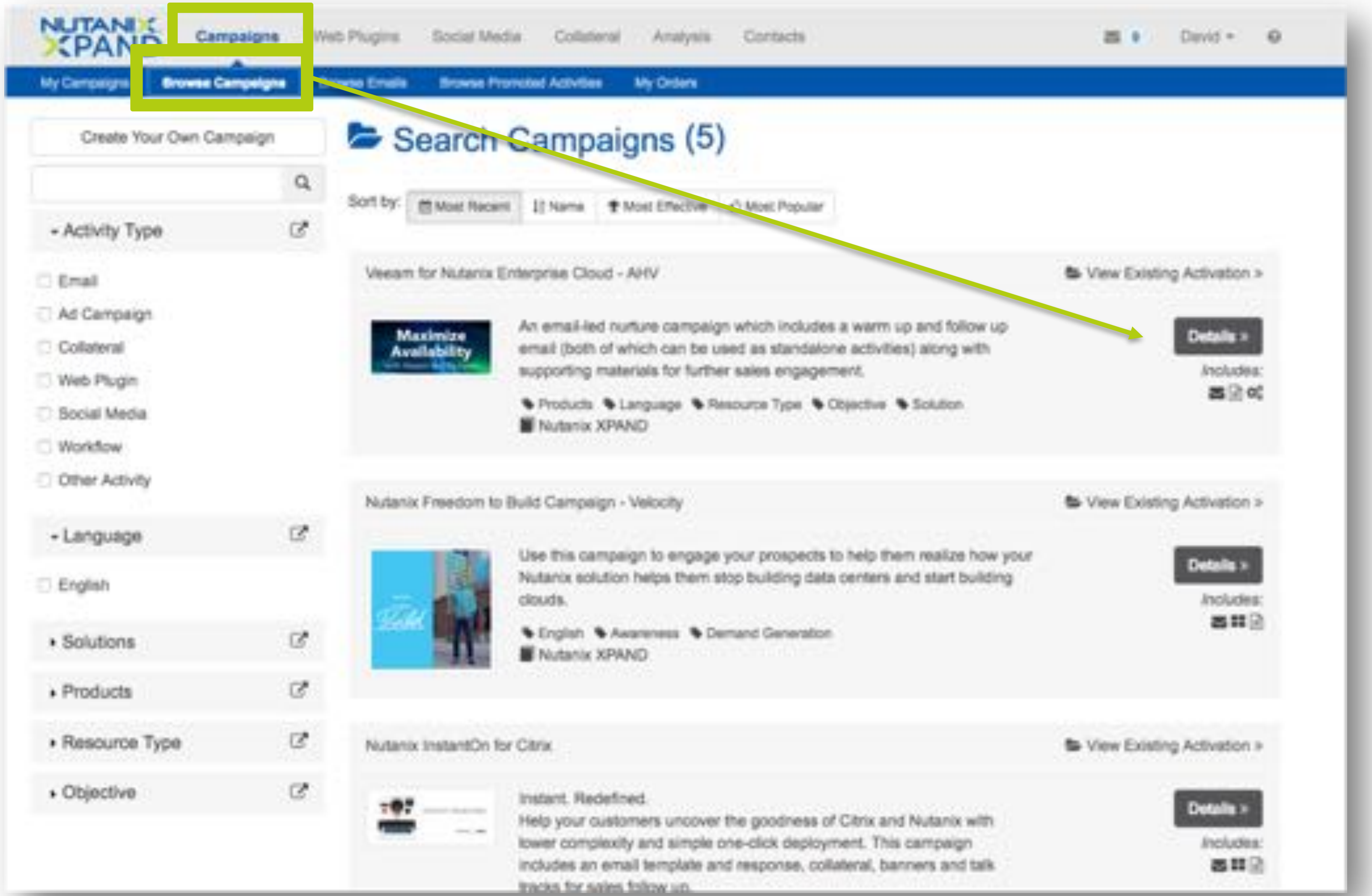
Activating an Email Workflow

Email Workflows in XPAND

Email is a vital element to your demand generation strategy. Leverage XPAND's email workflows to nurture your prospects and customers.

- All emails are customizable including content, call-to-action, pictures, logo, color scheme & contact information.
- Add in a unique value proposition to differentiate your brand.
- Leverage Membership Rules to create automated nurture streams.
- Before you begin, make sure your contact list is uploaded to XPAND.

Activating an email workflow (#1)



1. Navigate to ‘Campaigns’.
2. Select ‘Browse Campaigns’.
3. Search for a campaign.
4. Click ‘Details’ to open the campaign page.

Alternatively, you can activate an individual email by searching ‘Browse Emails’.

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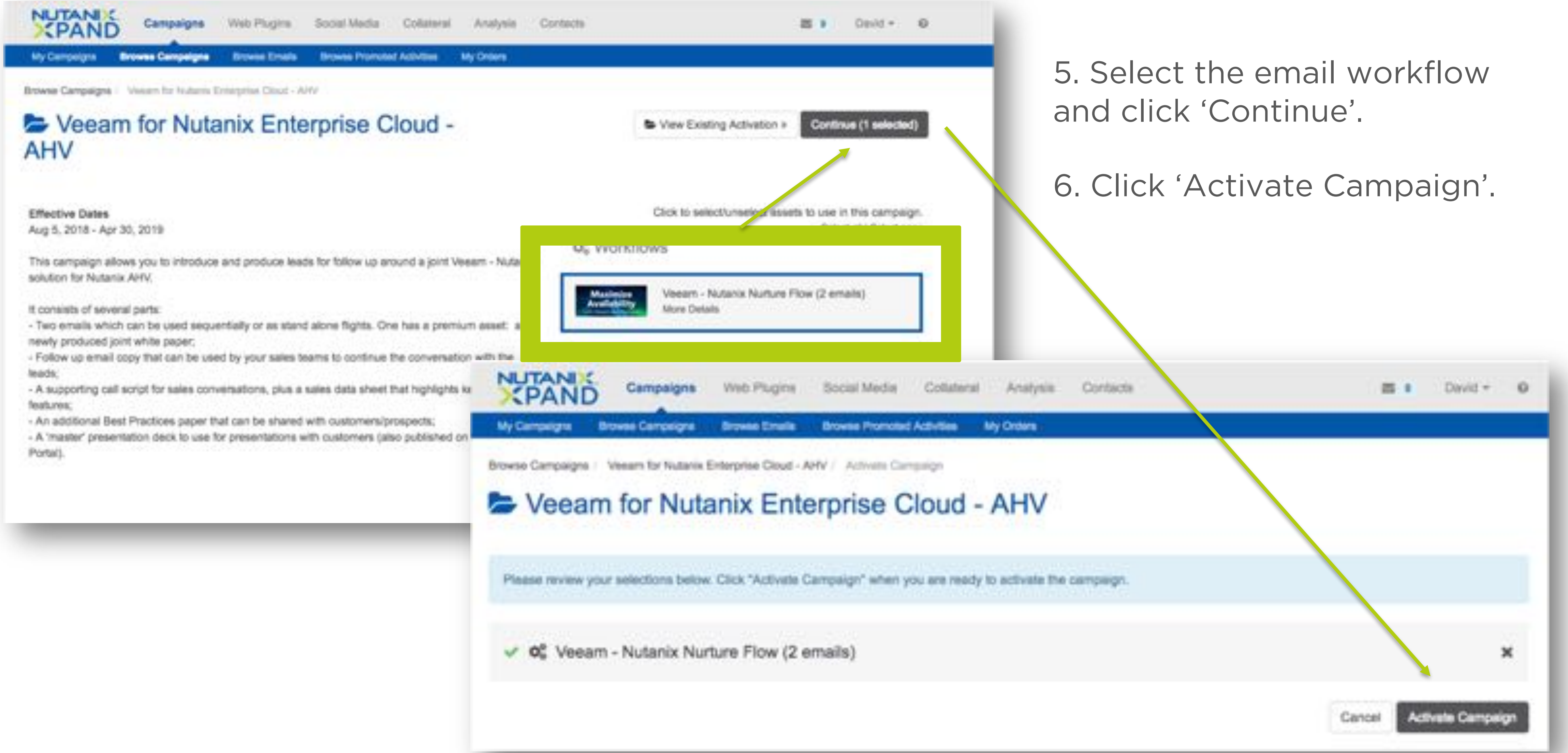
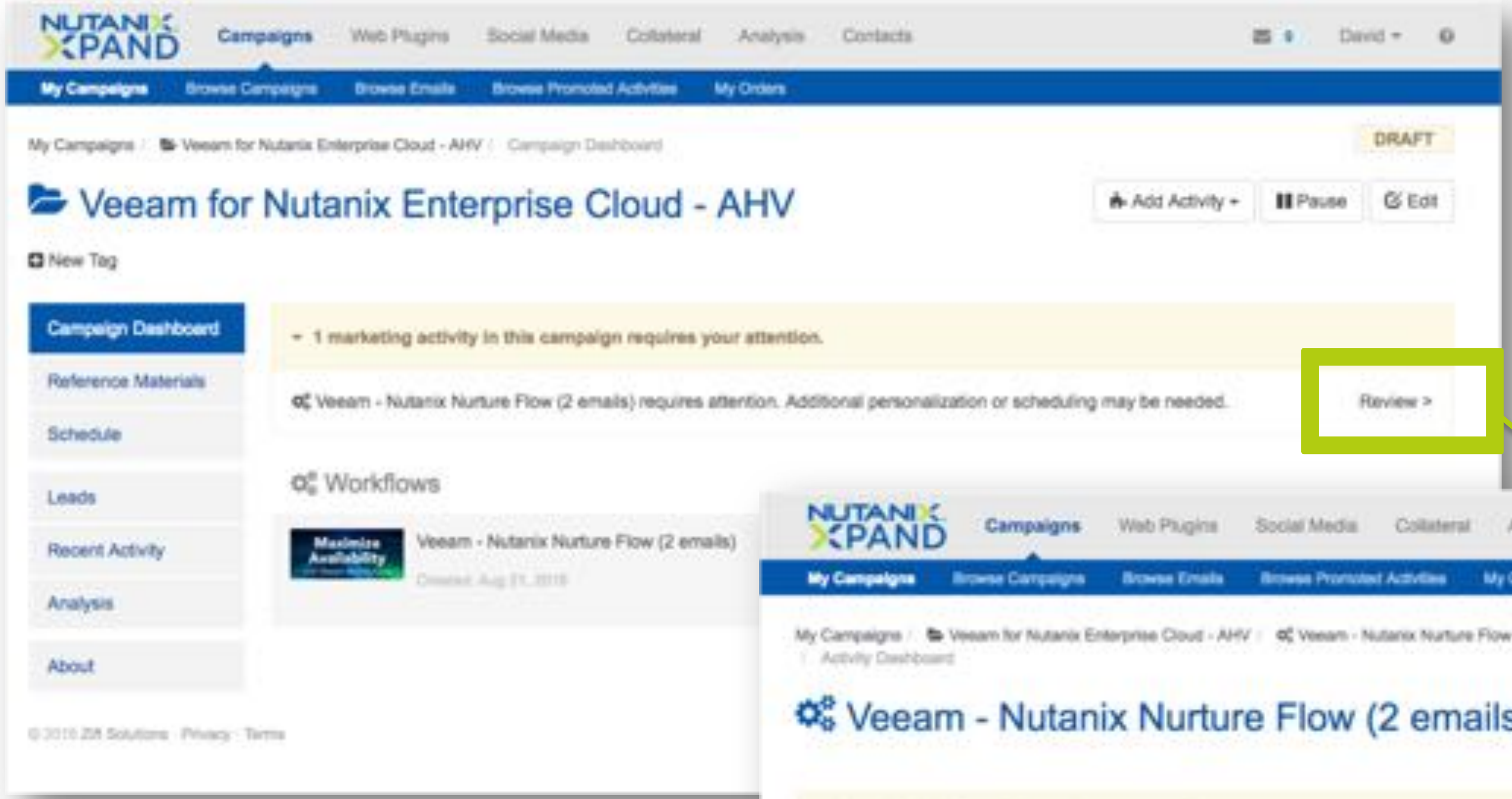
Activating an email workflow (#2)

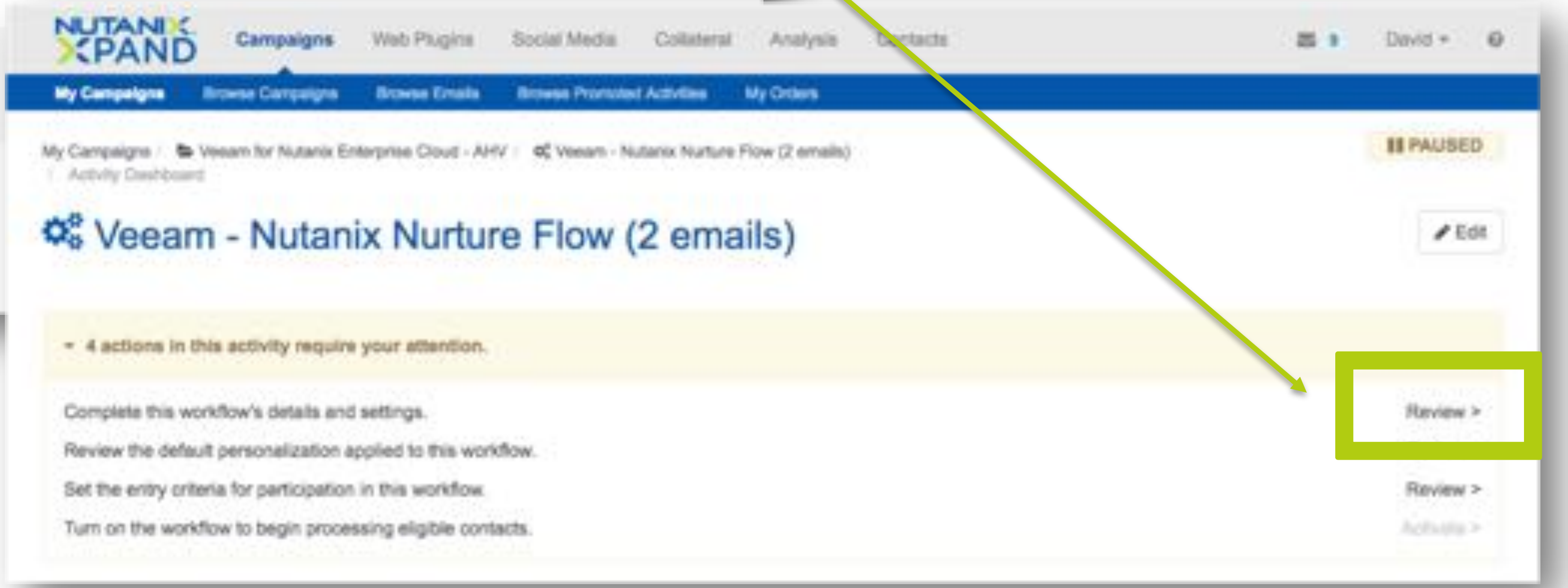


5. Select the email workflow and click 'Continue'.

6. Click 'Activate Campaign'.

Activating an email workflow (#3)

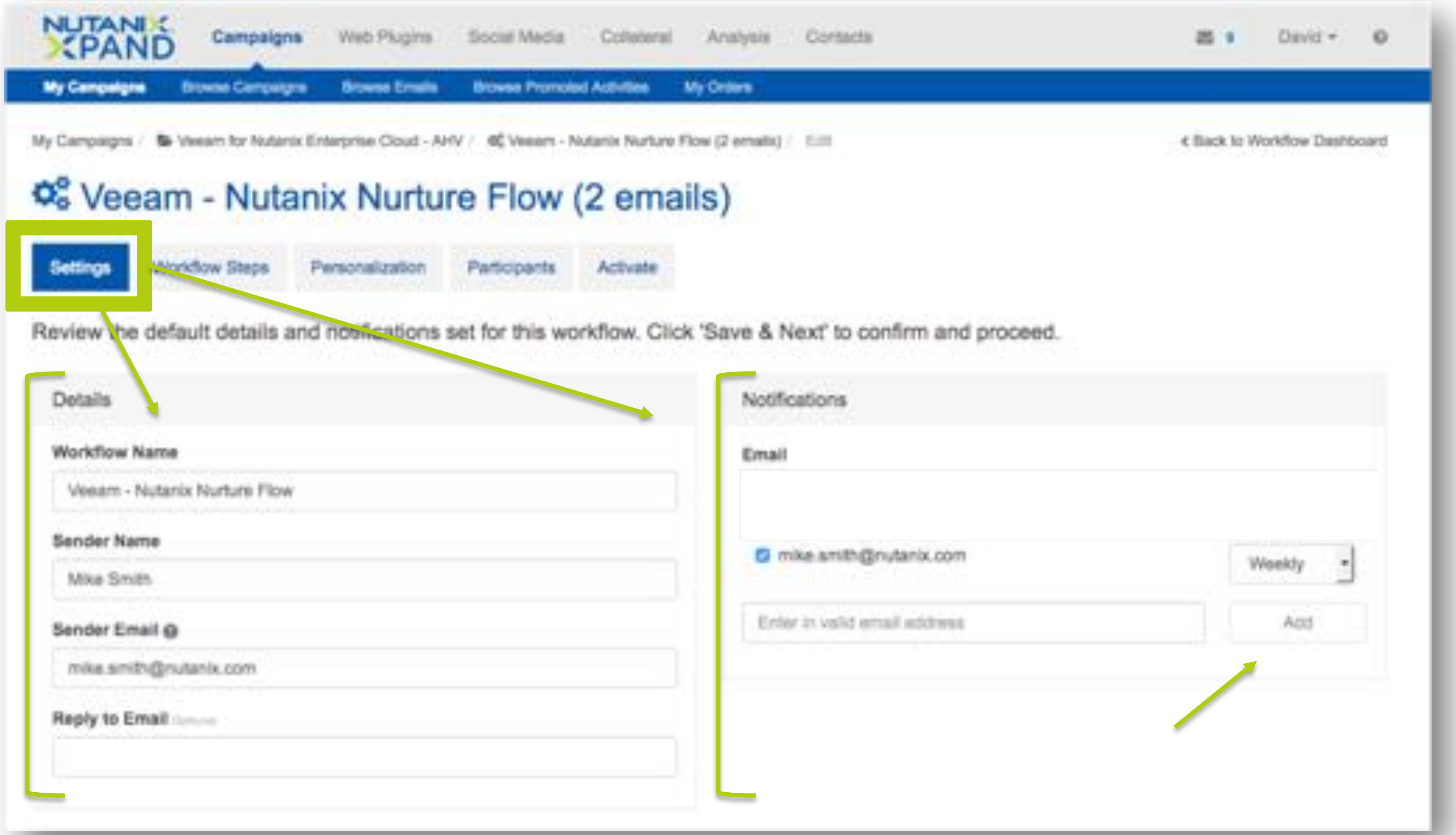




7. You'll arrive at the Campaign Dashboard. Click 'Review' to start personalizing.

8. Click 'Review' in the Activity Dashboard to customize each element of the email workflow.

Activating an email workflow (#4)



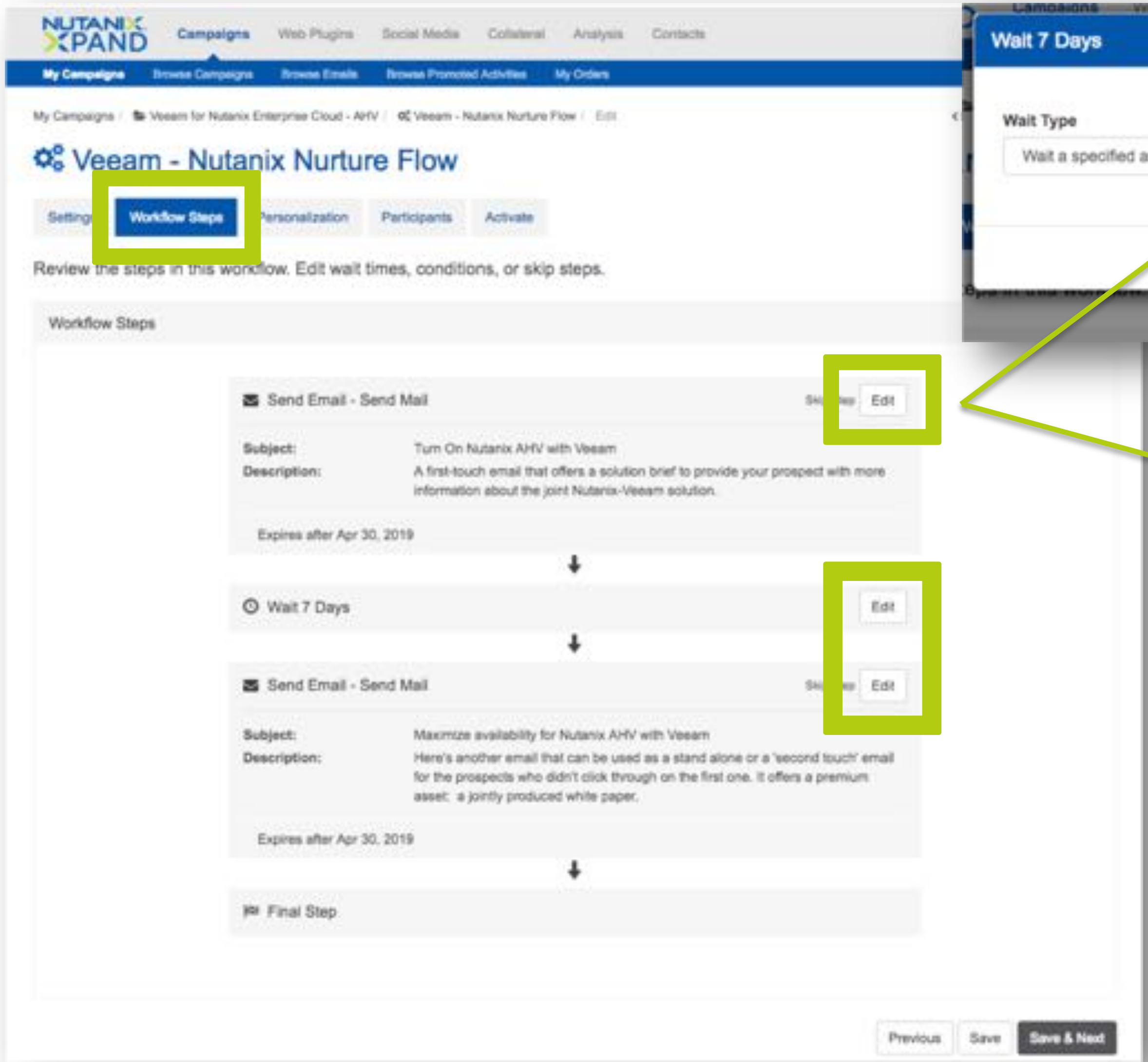
9. Define the workflow settings, including who the email is sent from.

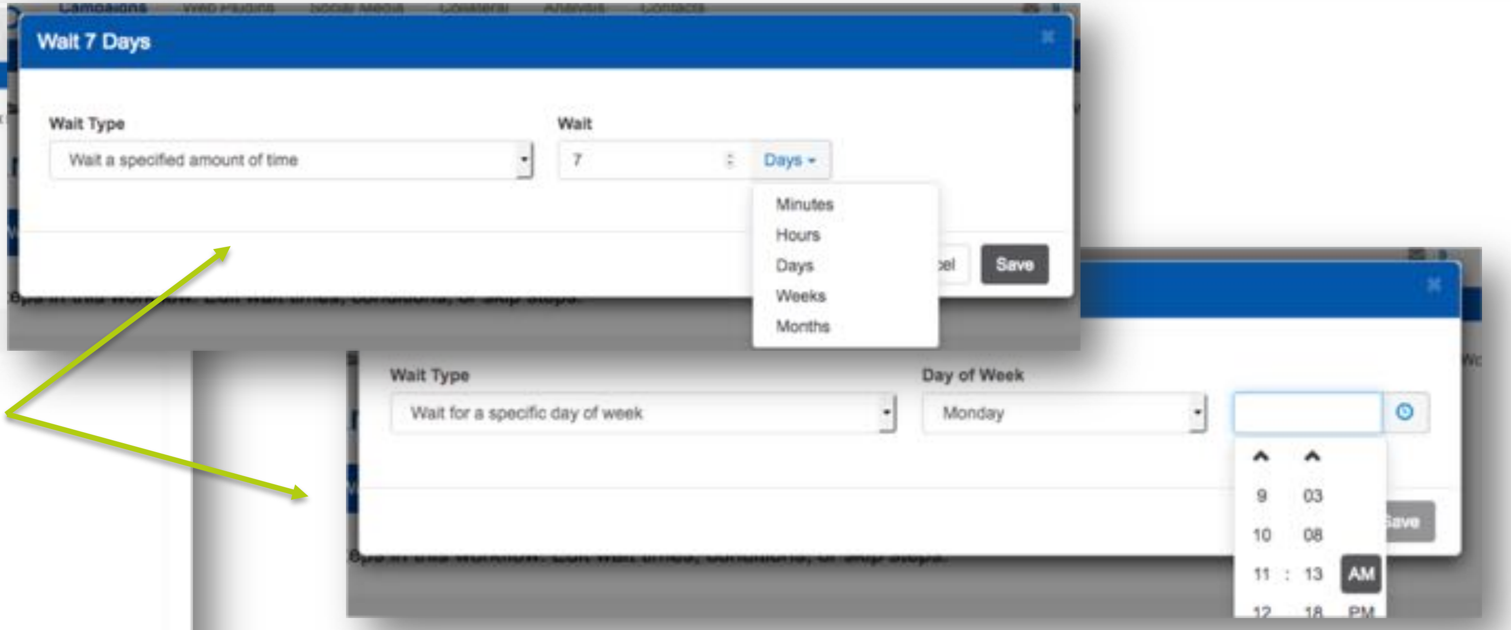
This name will appear in the ‘From’ field in the contact’s inbox. You may use a sales representative’s, marketer’s or company name.

10. Assign who should receive lead notifications. To add a new recipient, type the email address and click ‘Add’.

11. Click ‘Save & Next’.

Activating an email workflow (#5)





12. Establish the timing for each email under 'Workflow Steps' using the 'Edit' buttons.

Note: Workflows are designed to be always-on, so set your execution date by time intervals or day of the week, not a specific calendar date.

13. Click 'Save & Next'.

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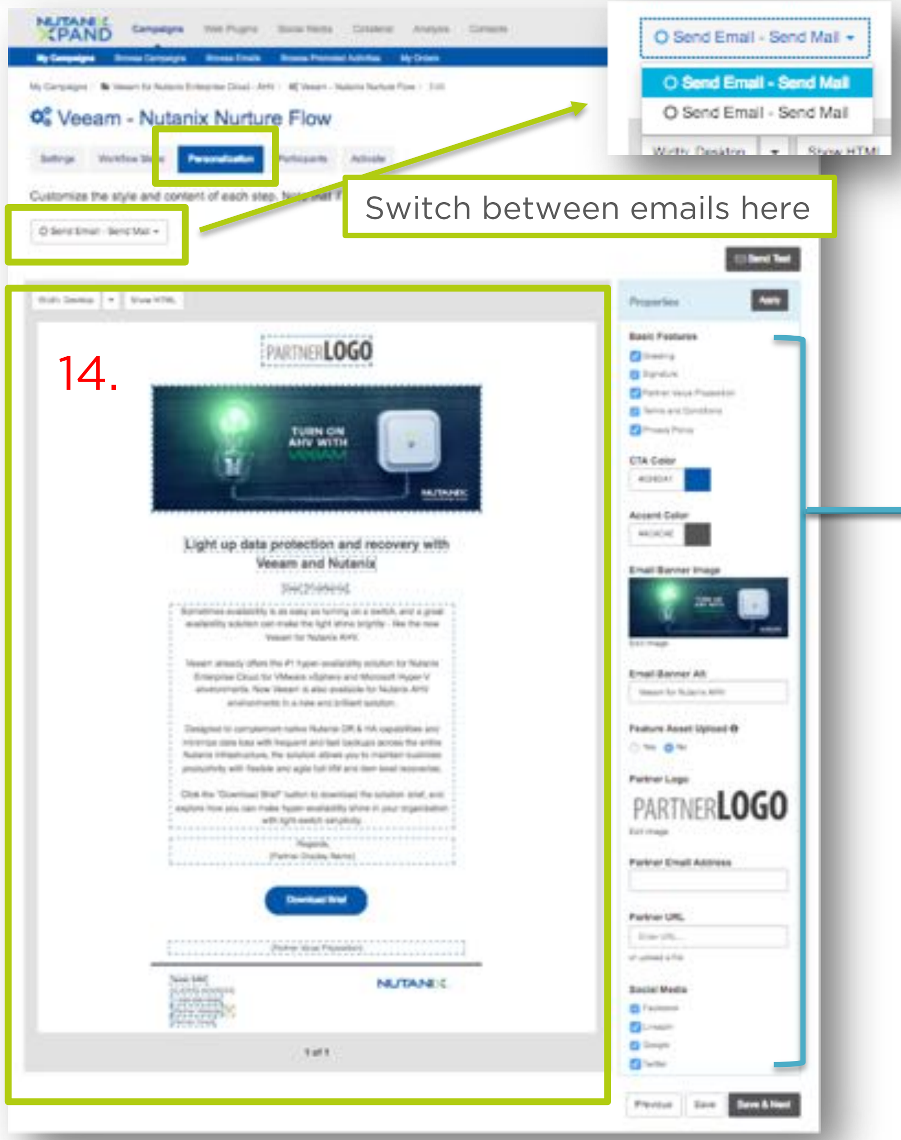
Activating an email workflow (#6)



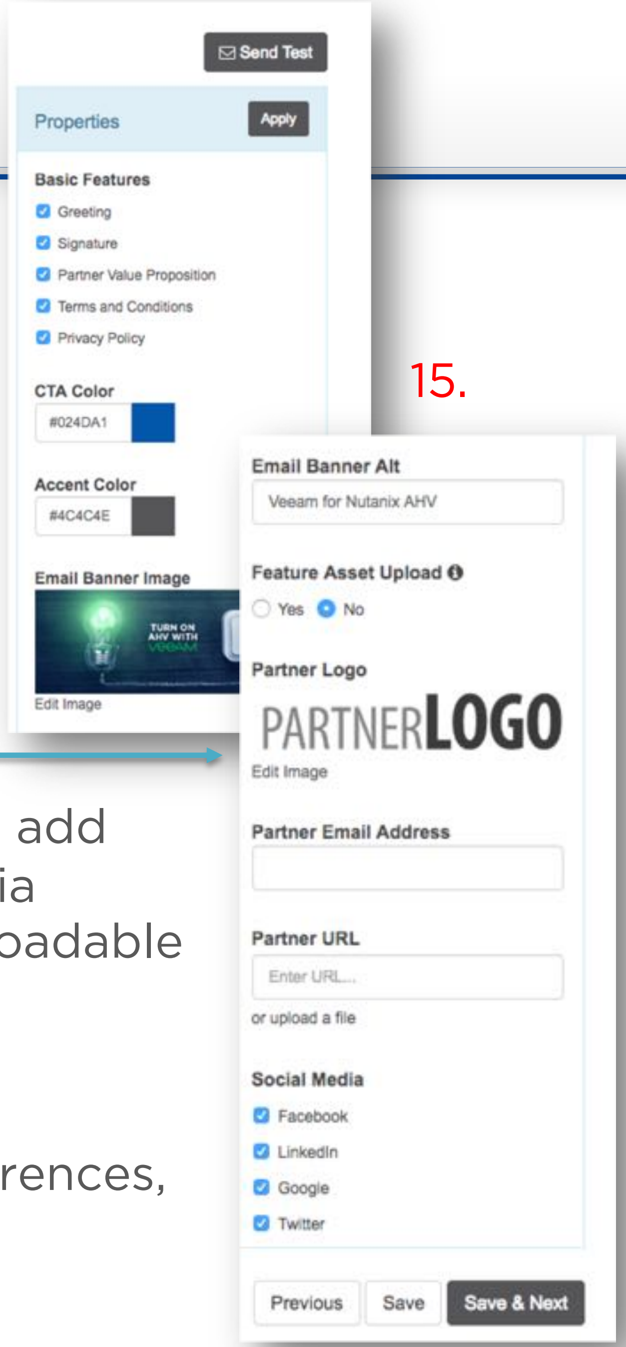
14. Make any content customizations in ‘Personalization’.

Anything outlined in a dotted line can be customized.

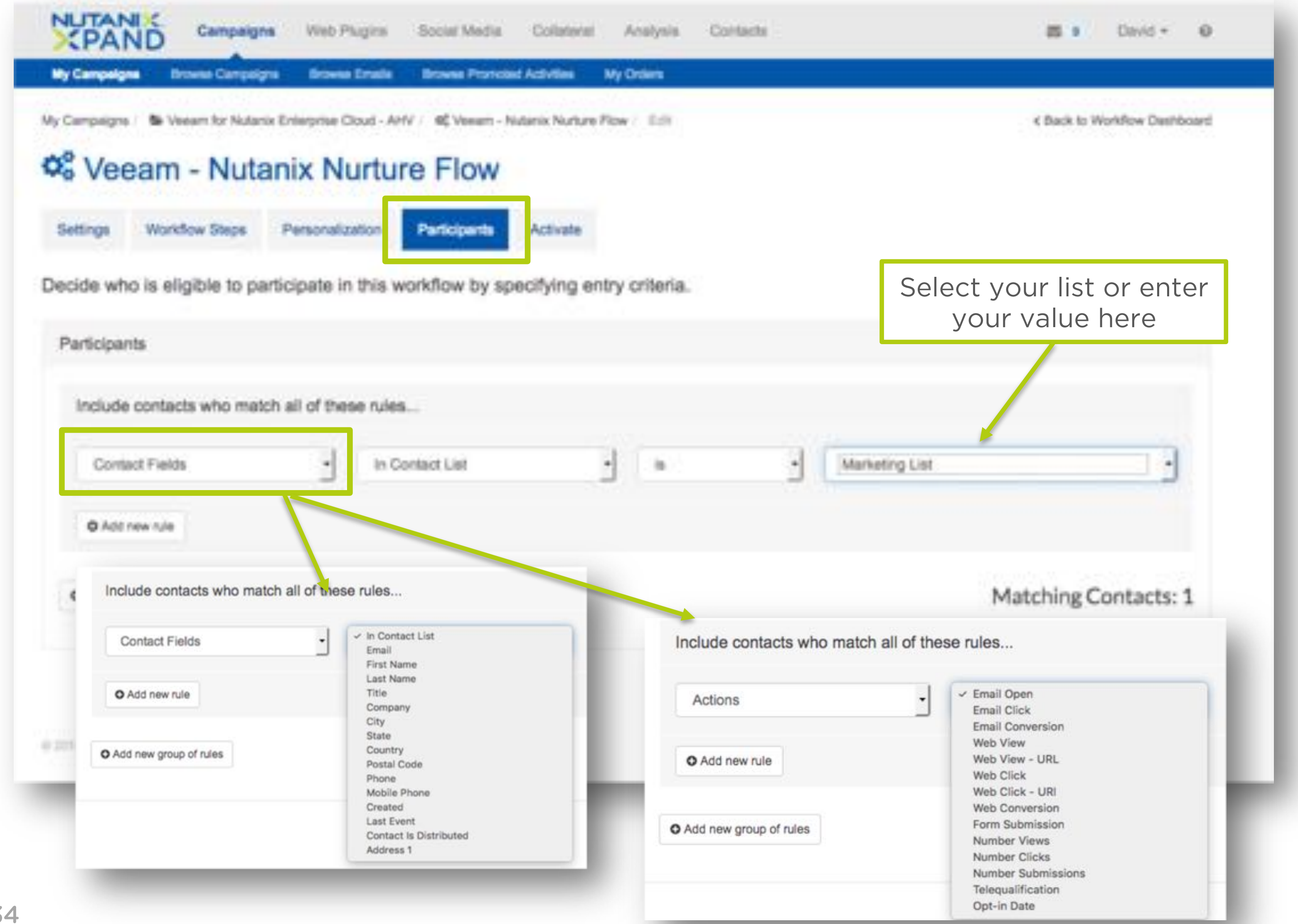
15. Change color schemes & images, add contact information, link social media accounts, leverage your own downloadable asset, and upload your logo in the ‘Properties’ toolbar.

Note: XPAND will save design preferences, streamlining future customizations.

16. Click ‘Save & Next’.



Activating an email workflow (#7)



17. Assign a contact list in the ‘Participants’ tab.

XPAND lets you segment lists in a variety of ways: use the drop downs to sort by geography, solution preference, demographics, and even past activity. See the ‘Membership Rules’ section for more detail.

Note: The more your execute in XPAND, the richer this data becomes.

18. Click ‘Save & Next’.

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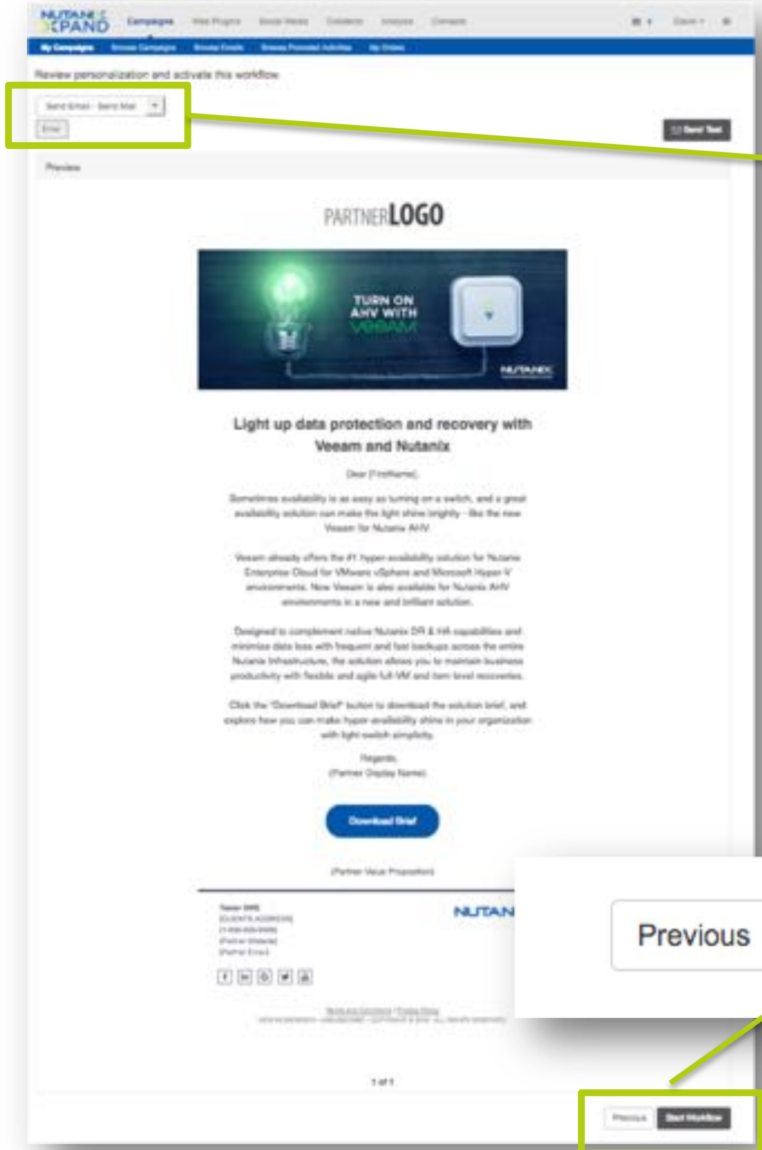
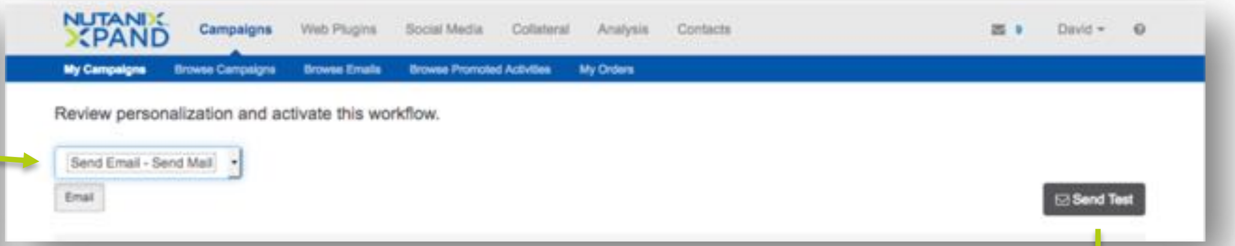
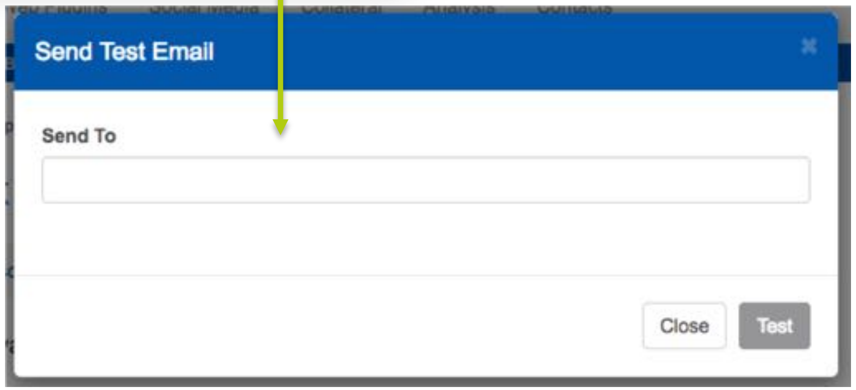
Activating an email workflow (#8)

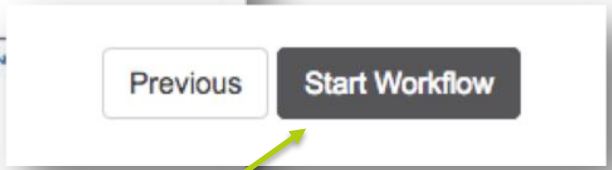




Tip: before going live, test the workflow using the 'Test Workflow' button.

19. Review your workflow one last time. Use the dropdowns in the top left corner to view each email. If you need to make changes, click 'Previous' and return to the wizard.





20. If you are satisfied with your email workflow, click 'Start Workflow'.

Your workflow is now live!

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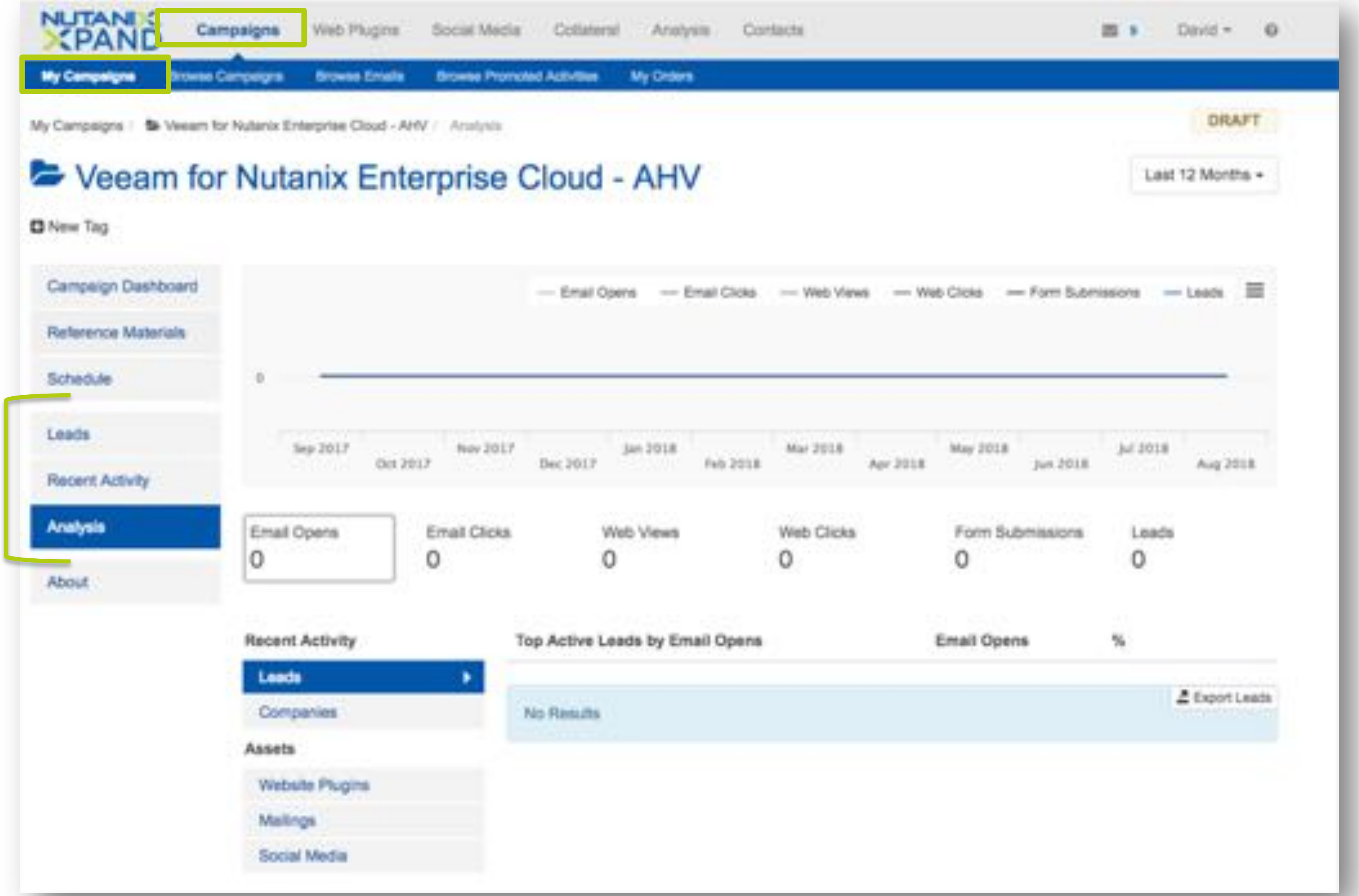
Activating an email workflow (#9)

To review reporting metrics on a specific email workflow, do the following:

1. Go to ‘Campaigns’, then ‘My Campaigns’.
2. Locate the workflow you wish to review and click into it.
3. In the dashboard, review leads, recent activity, and overall analysis.



Install Content Syndication Using Web Plugins

Content syndication using Web Plugins

Content syndication makes it easy to showcase the latest Nutanix content on your website.

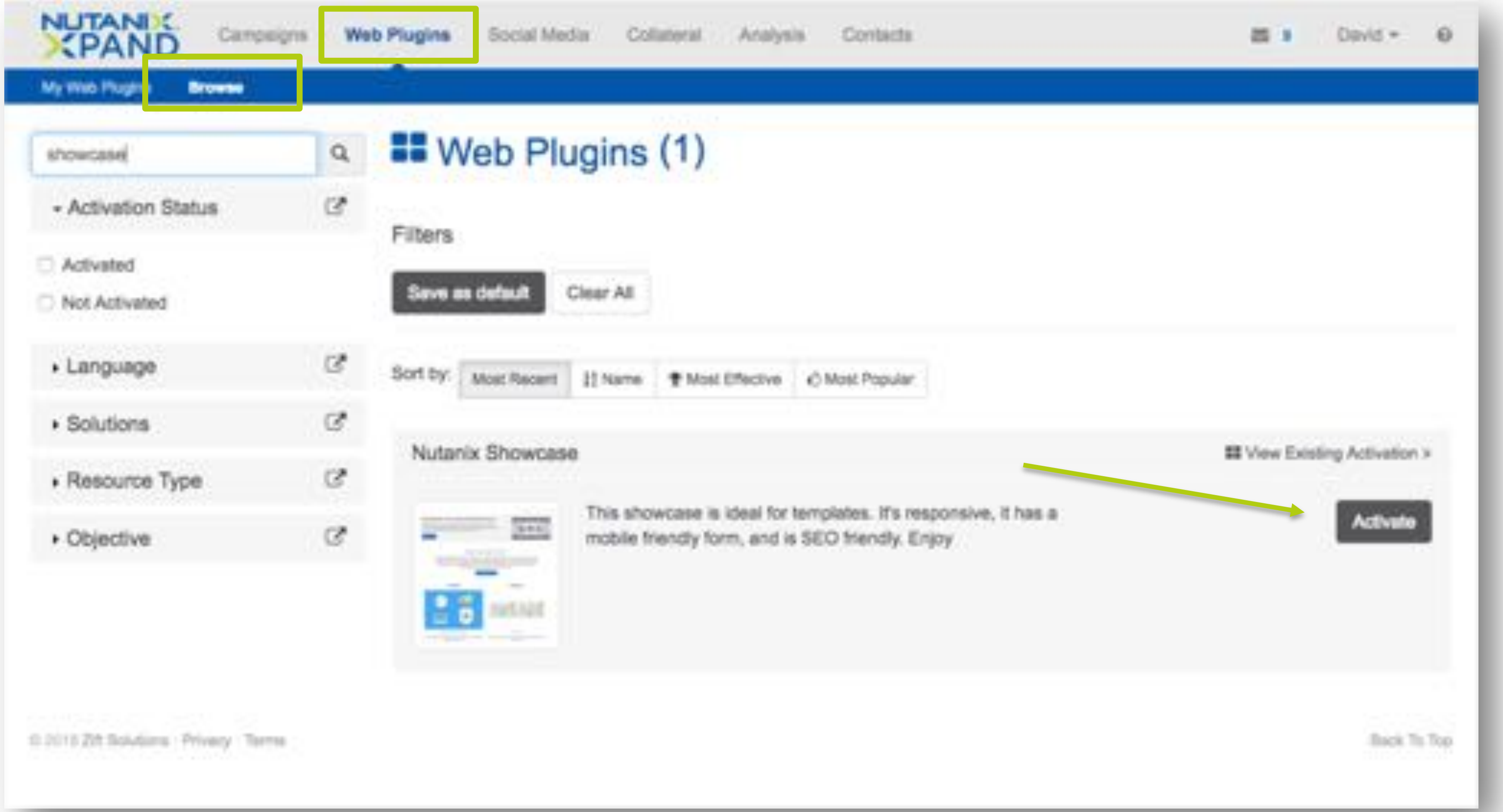
- Customize your Web Plugin including color scheme and contact information.
- Once your microsite or banner is installed, XPAND automatically pushes content to your website.
- This makes it easy to build your digital presence and convert your website visitors into leads.

Embedding your Web Plugin (#1)

1. Click ‘Web Plugins’.

2. Navigate to ‘Browse’.

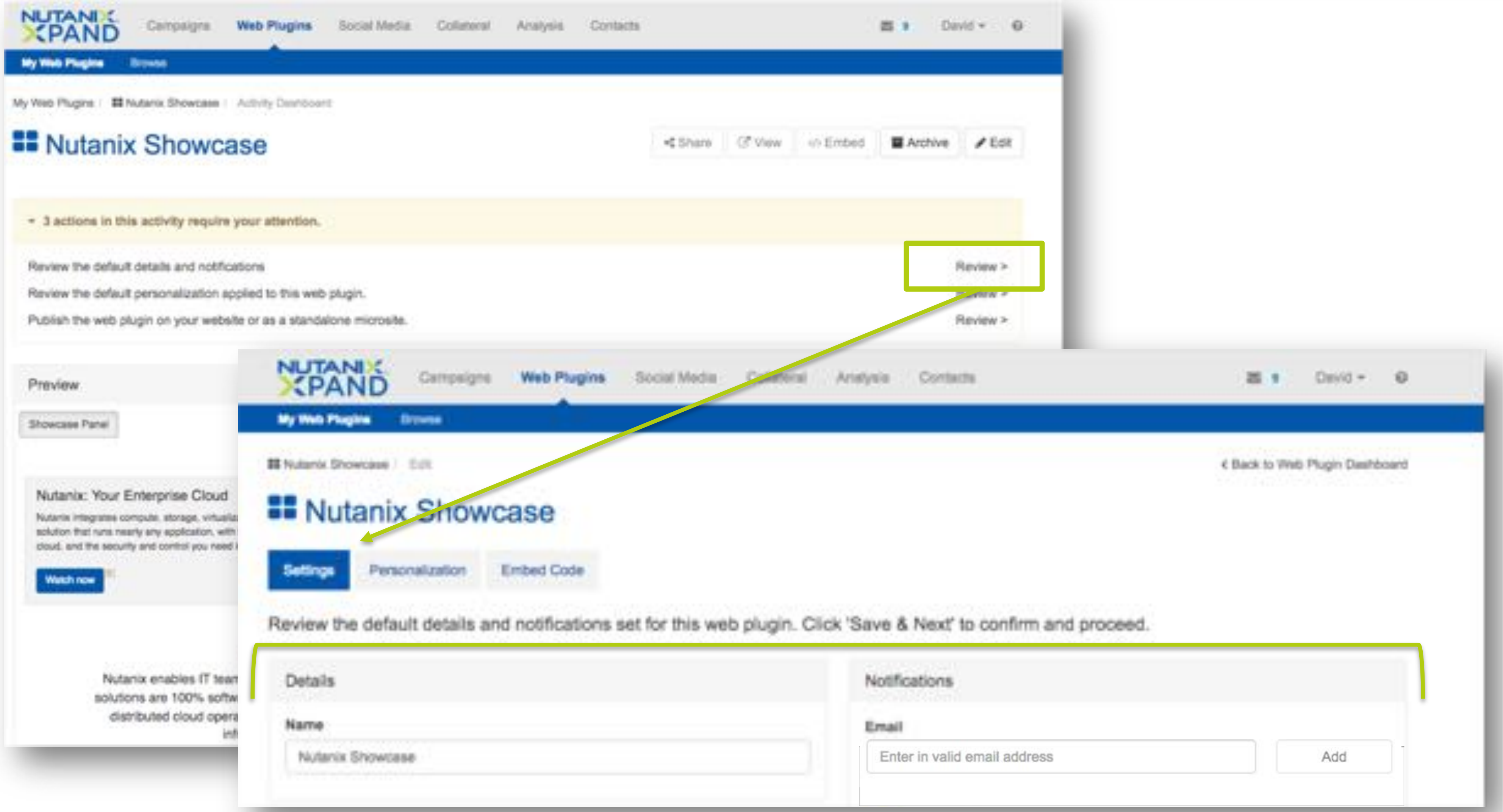
3. Search for the Web Plugin that best fits your marketing strategy. Click ‘Activate’.



Embedding your Web Plugin (#2)

4. You'll arrive at the Activity Dashboard. Click 'Review' to begin.

5. In the 'Setting' tab, name the tactic and update notification preferences.



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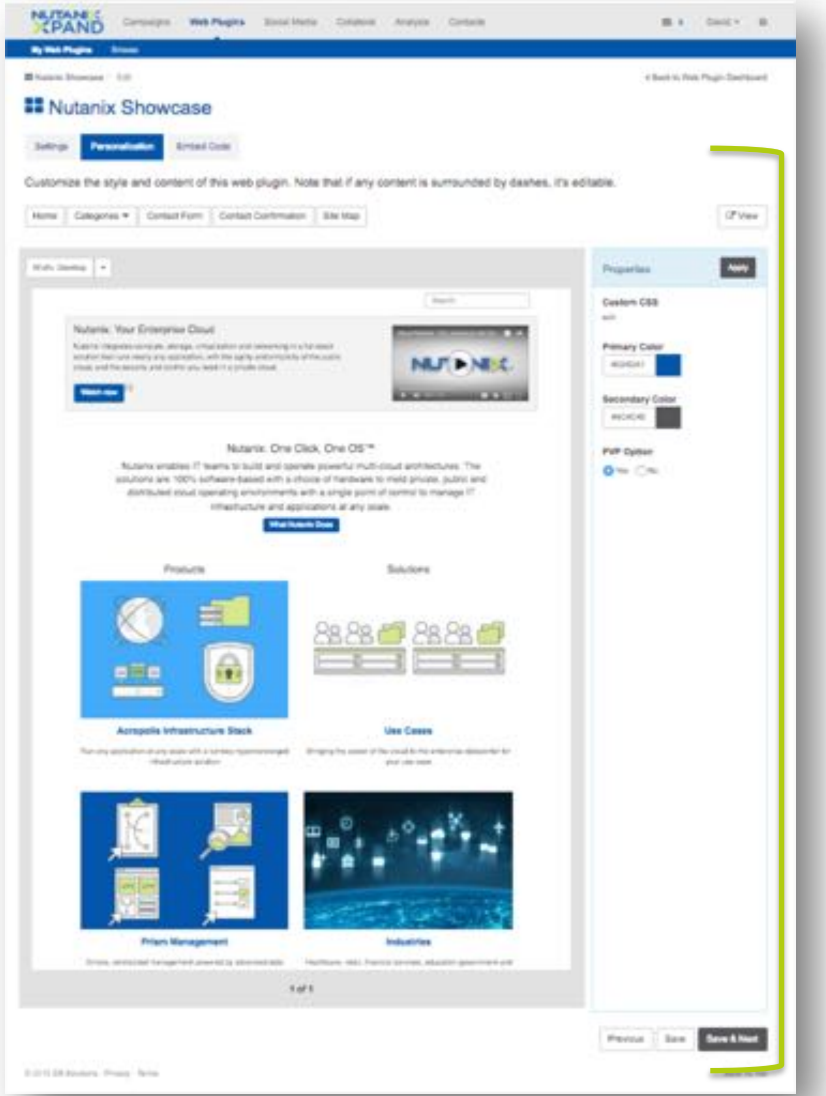
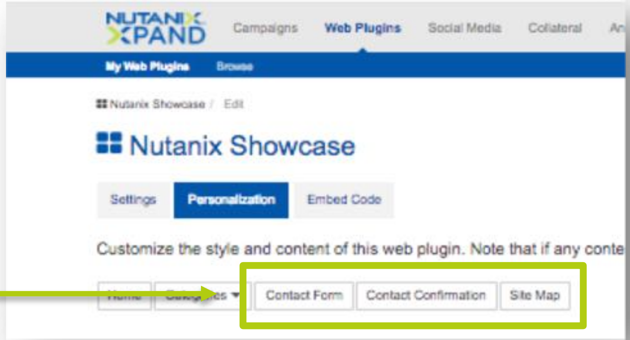
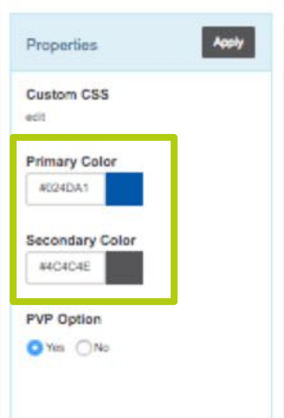
Embedding your Web Plugin (#3)





6. Next, customize the Web Plugin under the 'Personalization' tab.

Be sure to review and customize each tab.



Change color schemes and other preferences in the 'Properties' toolbar. XPAND will remember these preferences, streamlining future customizations.

Any text surrounded in a dotted line can be customized.

7. Click 'Save & Next'.

Note: depending on the asset, you customization options will vary.

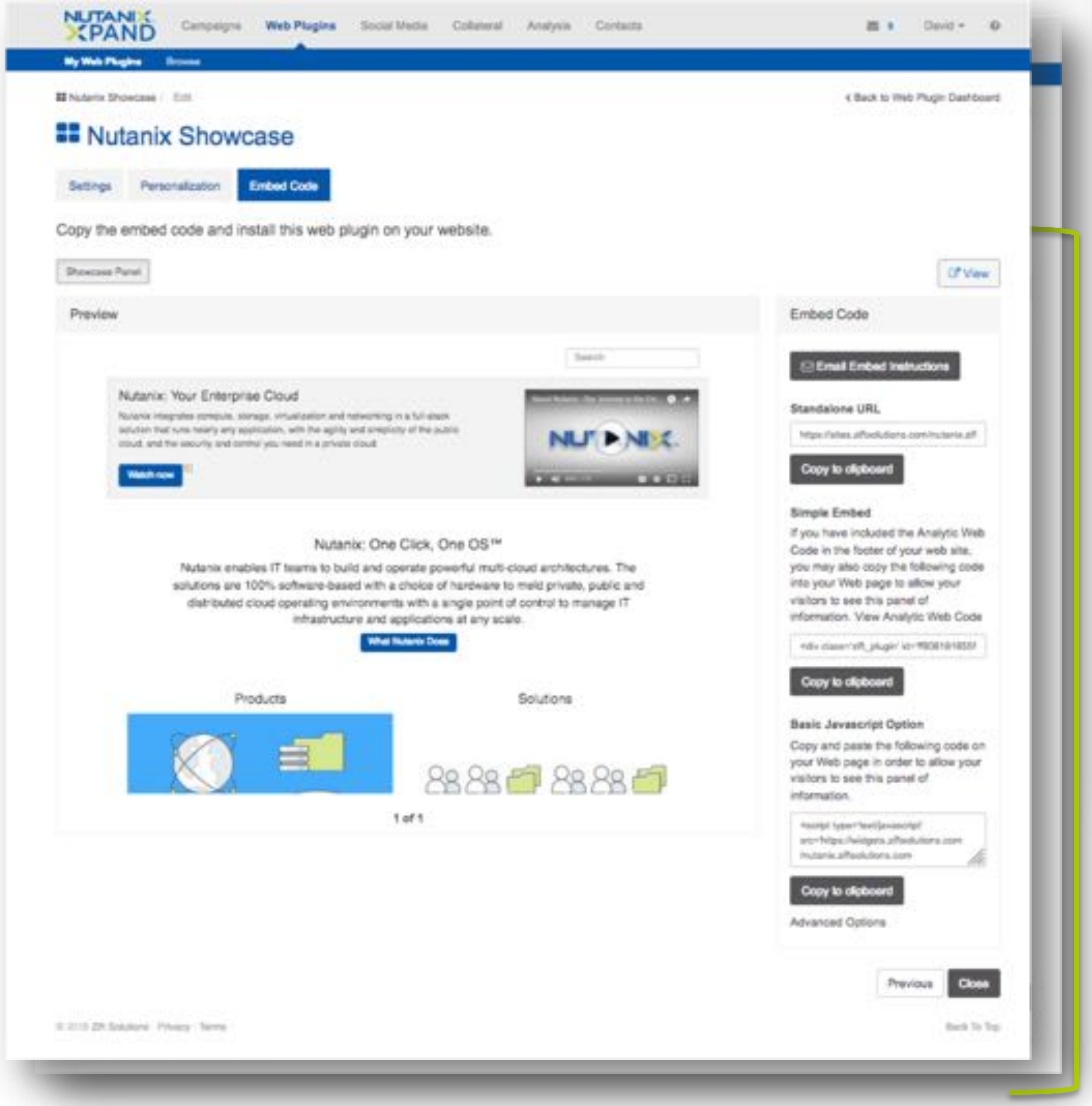
Embedding your Web Plugin (#4)

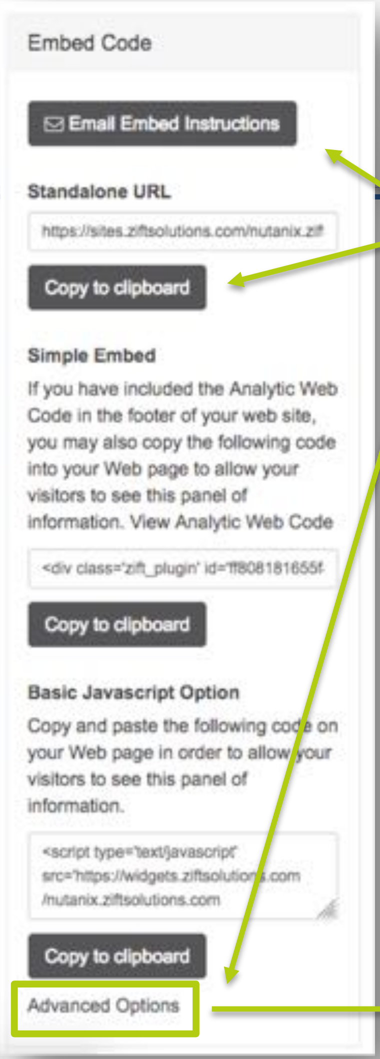
8. Use the ‘Embed Code’ tab to install the Web Plugin on your website or digital media. XPAND provides a variety of embed options.

Once embedded, the Web Plugin is considered live.

9. Click ‘Close’ to return to the dashboard.

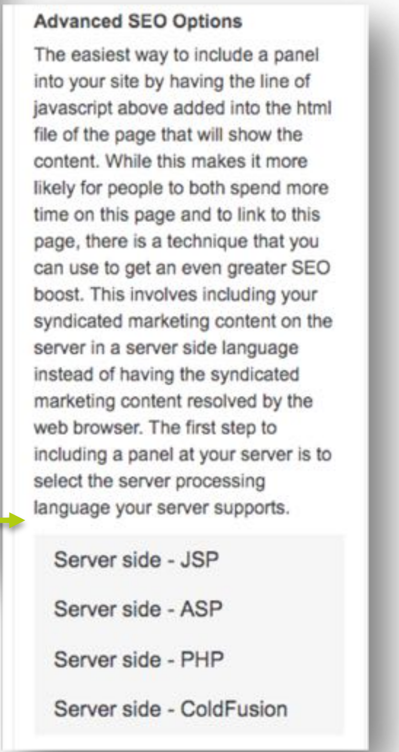
Note: The Web Plugin must be reviewed entirely before embedding.





Email to your website administrator.

Or, DIY and copy to your clipboard.



Embedding your Web Plugin (#5)

To review reporting metrics on your Web Plugin, do the following:

1. Go to ‘Web Plugins’, then ‘My Web Plugins’.
2. Locate the Web Plugins you wish to review and click into it.
3. In the dashboard, review leads, recent activity, and overall analysis.

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Turn on Social Media Syndication

Social syndication in XPAND

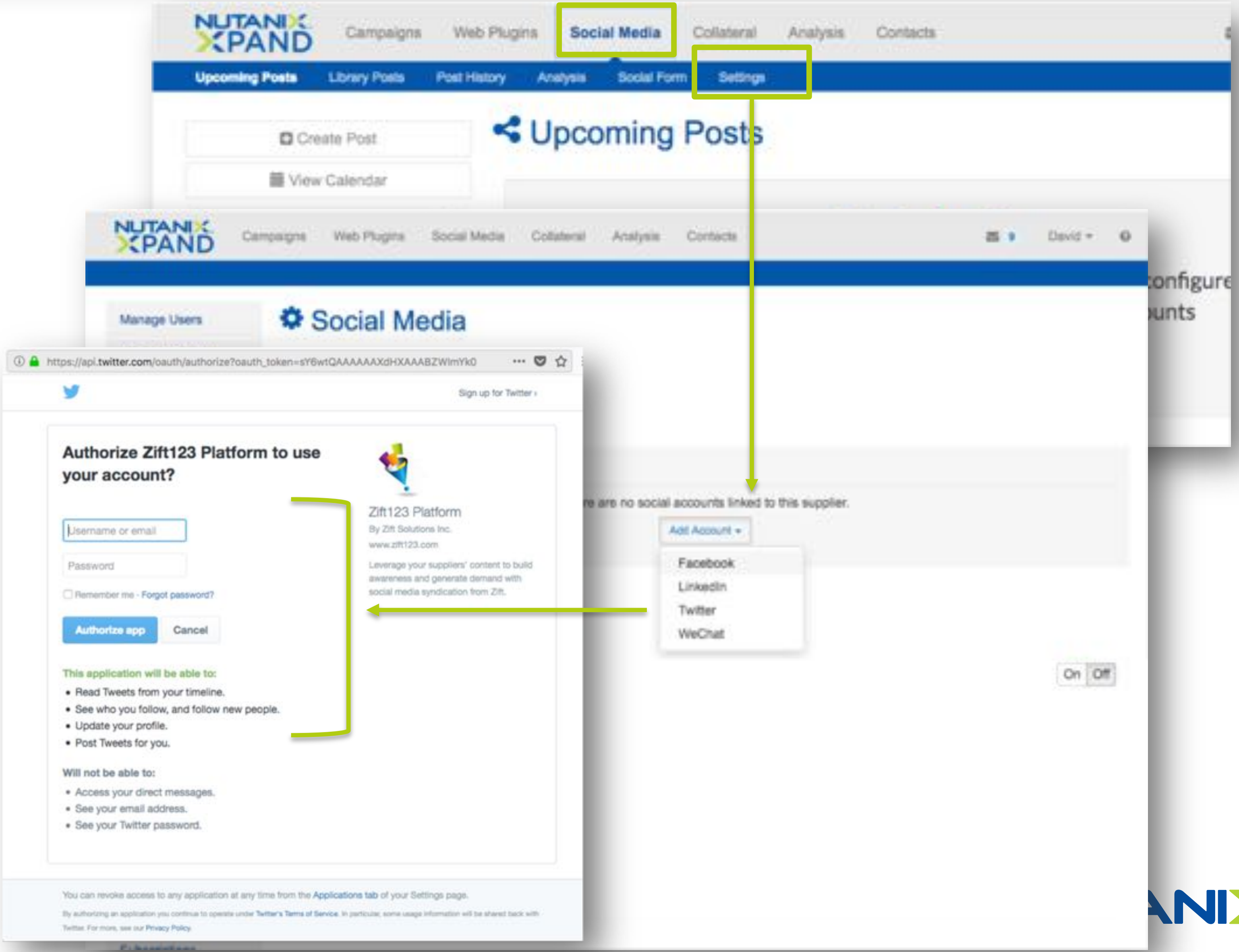
A strong social presence is critical to stay relevant in today's digital marketing landscape.

- XPAND makes it easy to build a social strategy with automated and curated content.
- Multiple channels allow you to amplify your social presence.
- With content written by our subject matter experts, you can position yourself as a thought leader.

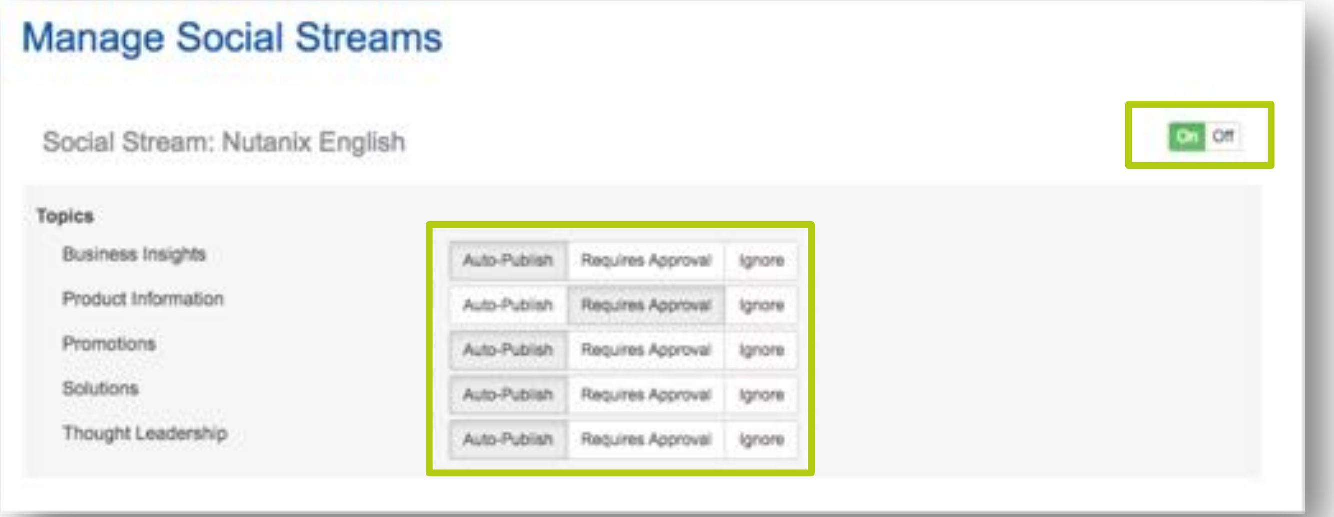
Start syndicating social content (#1)

1. Have your XPAND administrator log into XPAND.
2. Navigate to ‘Social Media’.
3. Click ‘Settings’.
4. Click “Add Account’ and authorize your social account.

Note: We recommend only linking a business account to XPAND.



Start syndicating social content (#2)

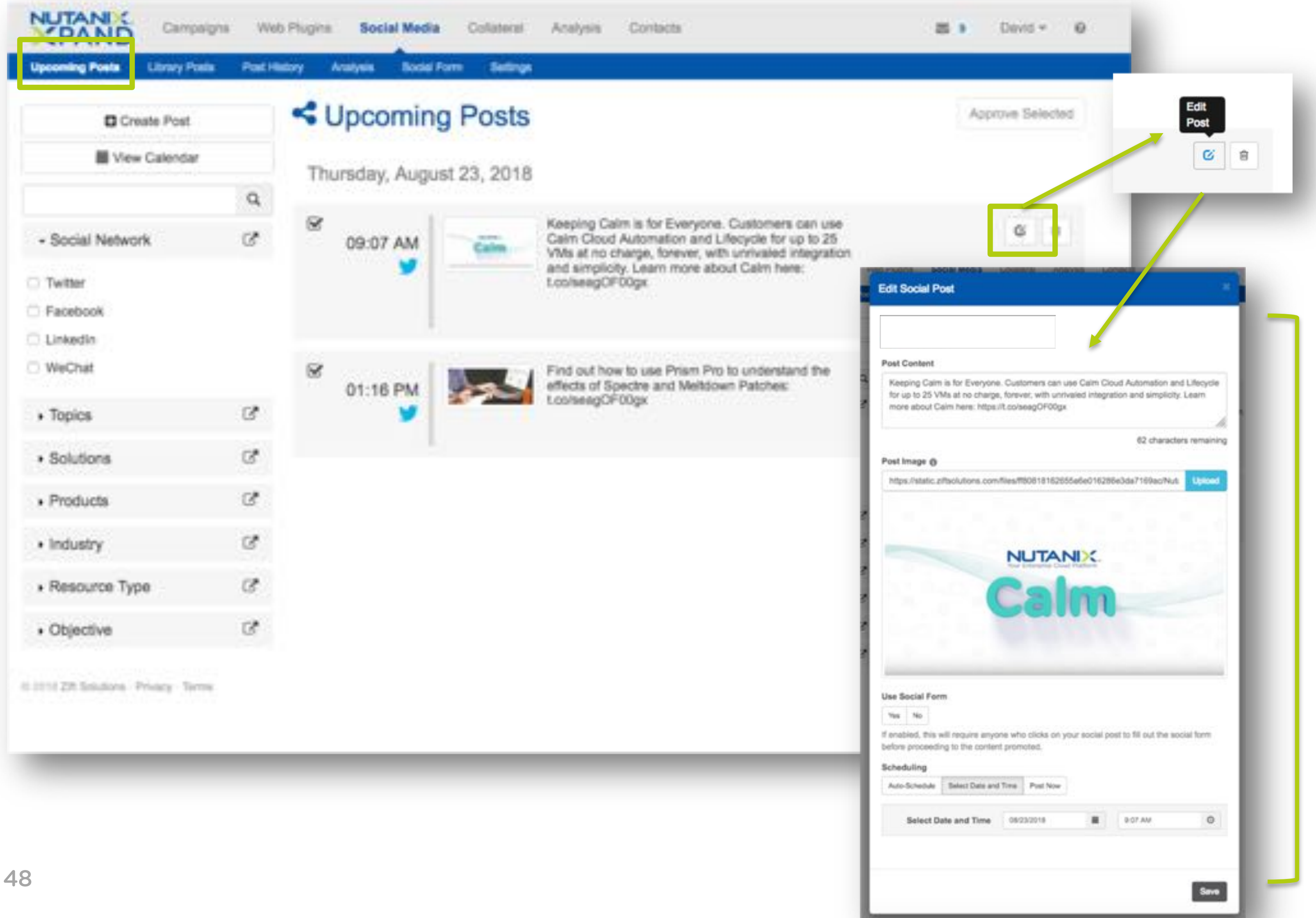


5. Turn on a content stream. Toggle the content 'On' or 'Off'

6. Choose your approval settings for each topic:

- 'Auto-Publish': XPAND will automatically post content without your approval.
- 'Requires Approval': XPAND requires you to approve a social post before it syndicates to your account. Posts are approved in the 'Upcoming Posts' section within the 'Social' tab.
- 'Ignore': XPAND will not syndicate anything regarding this topic.

Start syndicating social content (#3)



7. XPAND puts you in complete control. Review future posts in the 'Upcoming Posts' tab.

To edit a post, click the edit icon. A new window will open.

Change the content, image, and scheduling time.

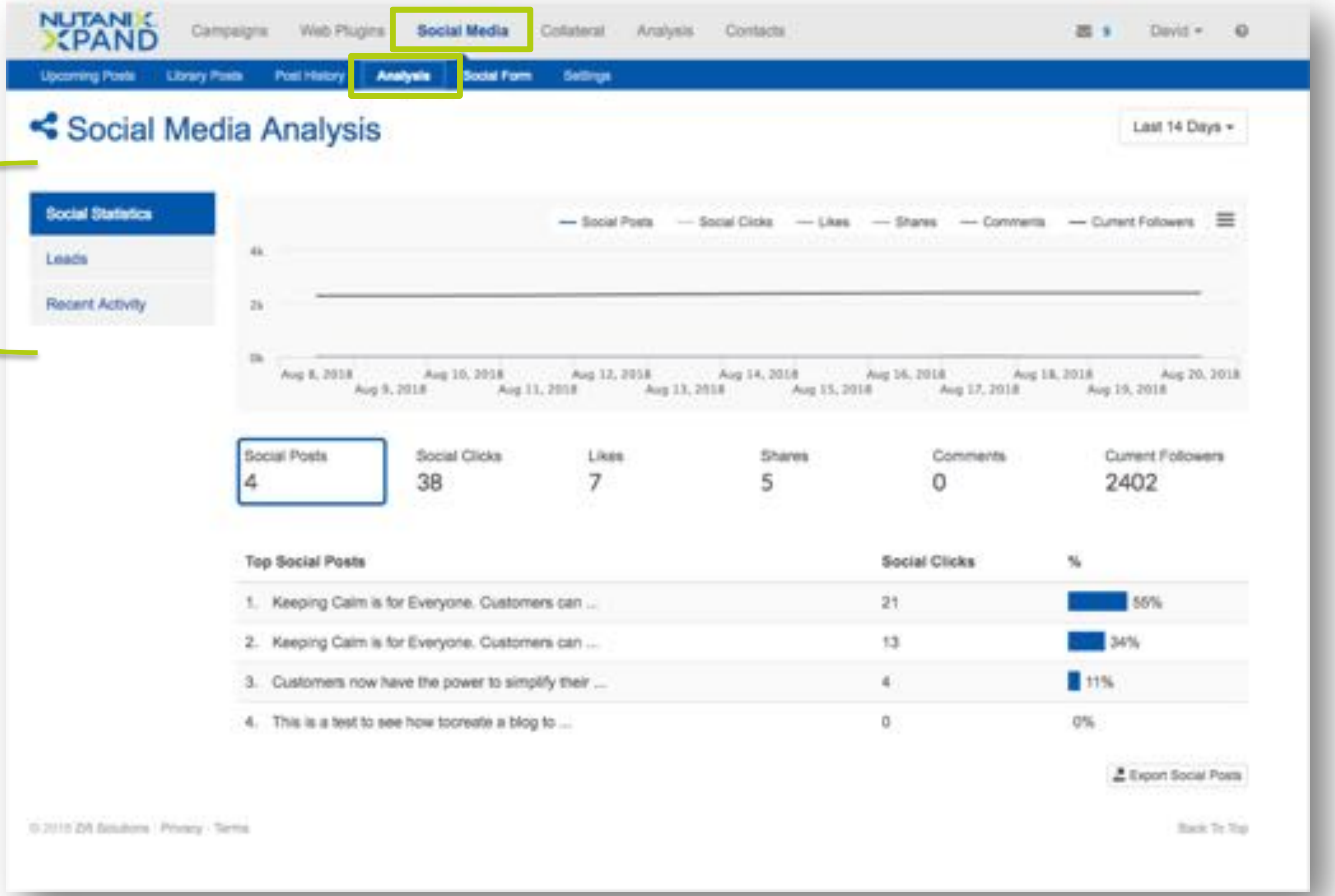
8. Click 'Save'.

Start syndicating social content (#4)

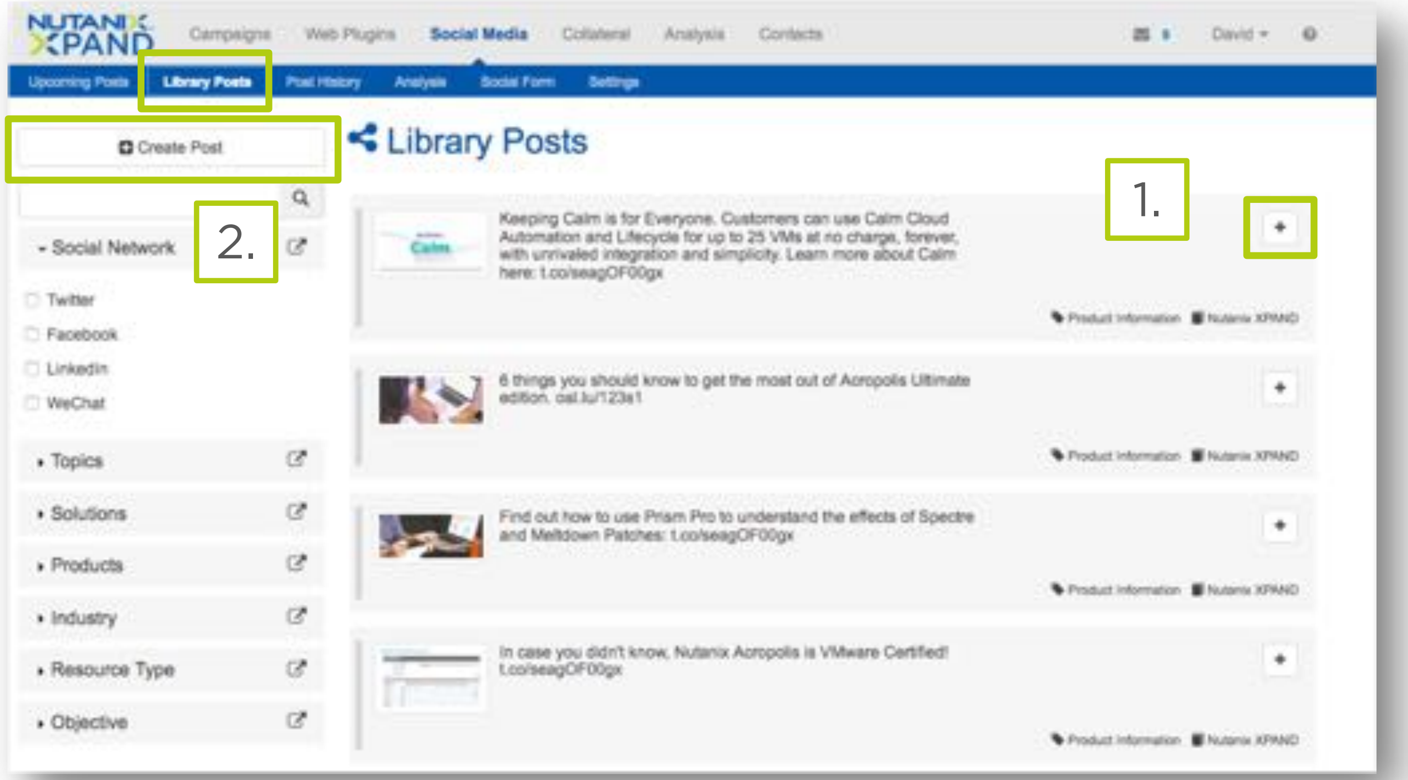
9. Once your accounts are linked and content is flowing, review social media activity. Navigate to ‘Social Media’ and click ‘Analysis’.

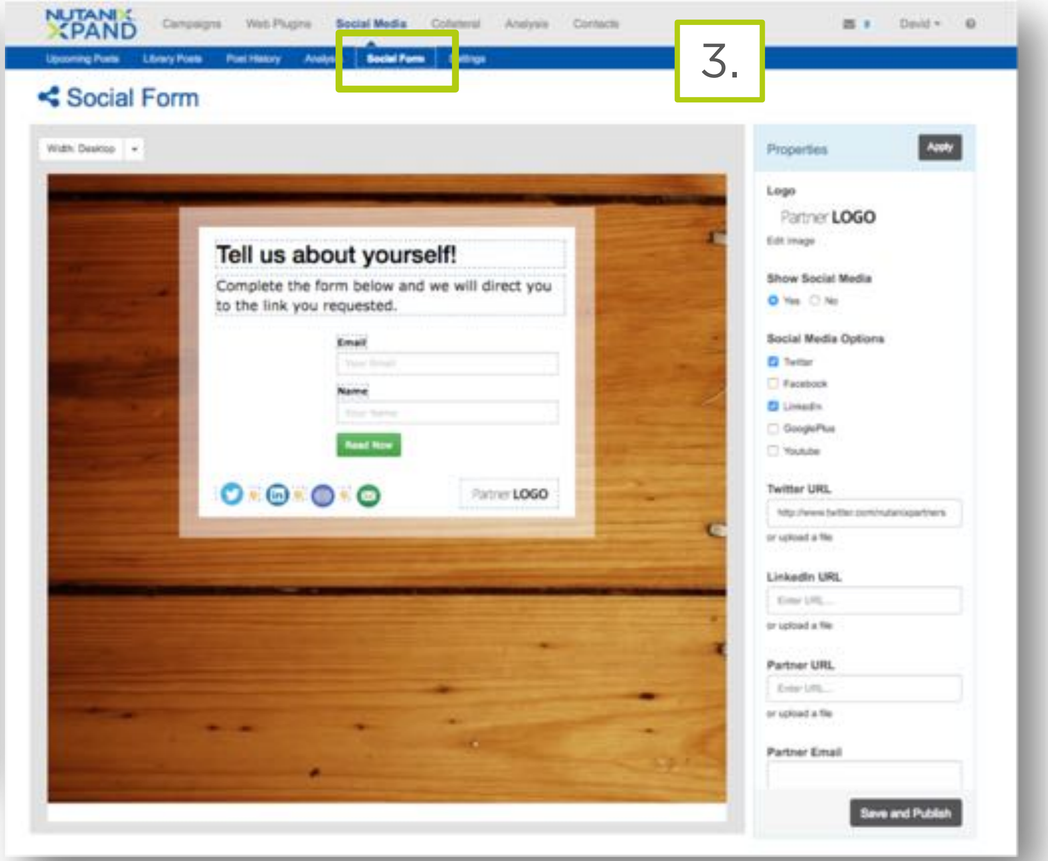
Review overall statistics, leads and activity within the last 30 days.

Note, you can only access social analytics within the ‘Social Media’ tab.



Start syndicating social content (#5)





3 other XPAND social features to consider:

- Access evergreen content in the ‘Library Posts’ tab. Simply click the ‘+’ to schedule.
- Create a custom post using the ‘Create Post’ button. The is a great way to share about an event or unique offer but stay within the XPAND ecosystem.
- Gate your content with the ‘Social Form’ feature.

Download & Customize Collateral

Exploring Nutanix content in XPAND

Download rich content for marketing campaigns, sales meetings, presentations and more.

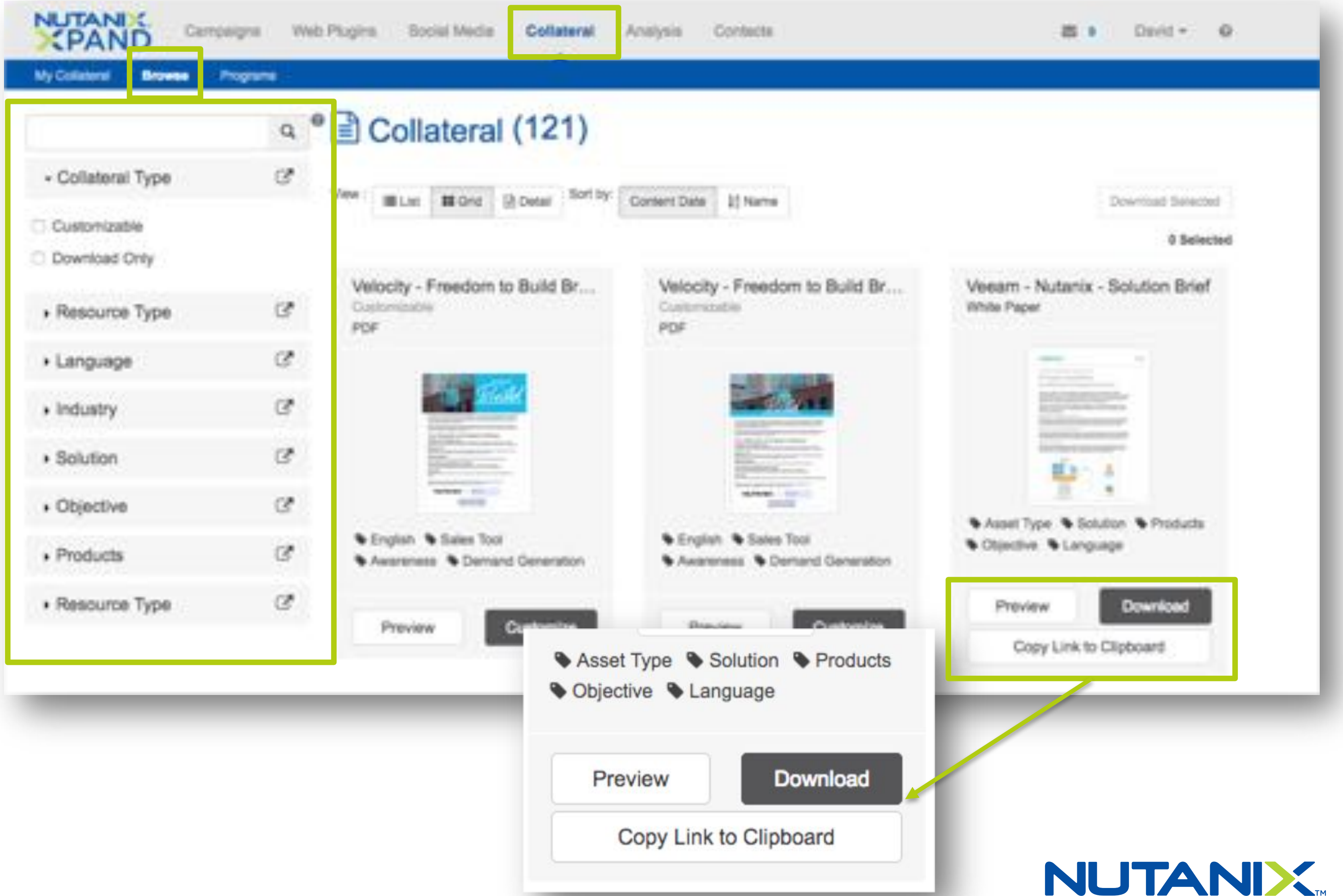
- Many pieces are customizable, meaning you can add your logo and contact information directly to the document using the wizard in XPAND.
- Content includes advertising, analyst reports, campaigns, FAQs, guides, graphics, infographics, solution briefs and white papers.
- Mix and match assets based on your Nutanix marketing plan.

Downloading content in XPAND

1. Navigate to the ‘Collateral’ tab and click ‘Browse’.

2. Search by name or drill down using the search filters on the left.

3. To download, simply click one or multiple assets and then select ‘Download Selected’. Or, copy to your clipboard and share.



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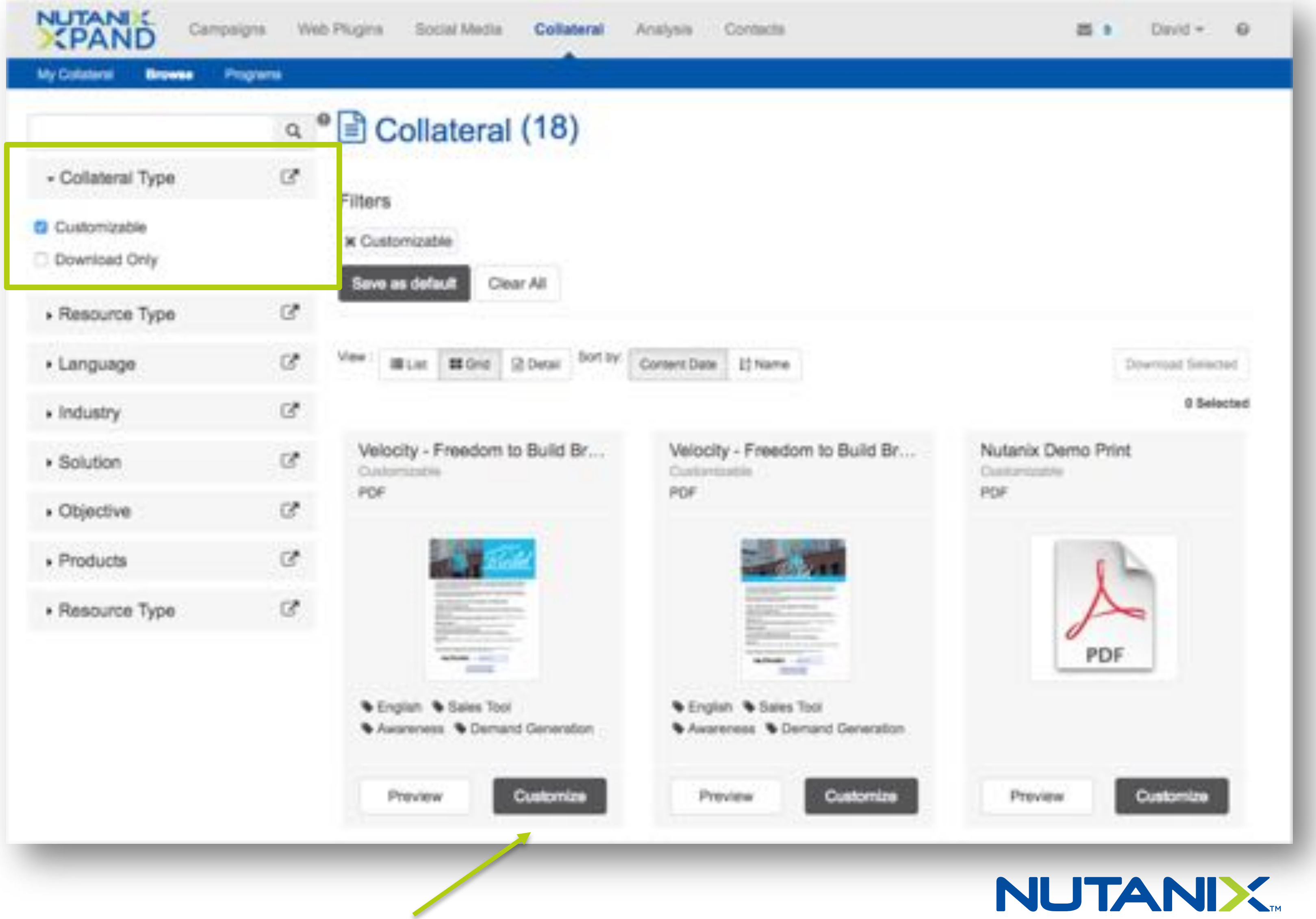
Customizing collateral in XPAND (#1)

1. To customize an asset in XPAND, sort by ‘Customizable’ under ‘Collateral Type’.

2. Once you find a PDF to personalize, click ‘Customize’.

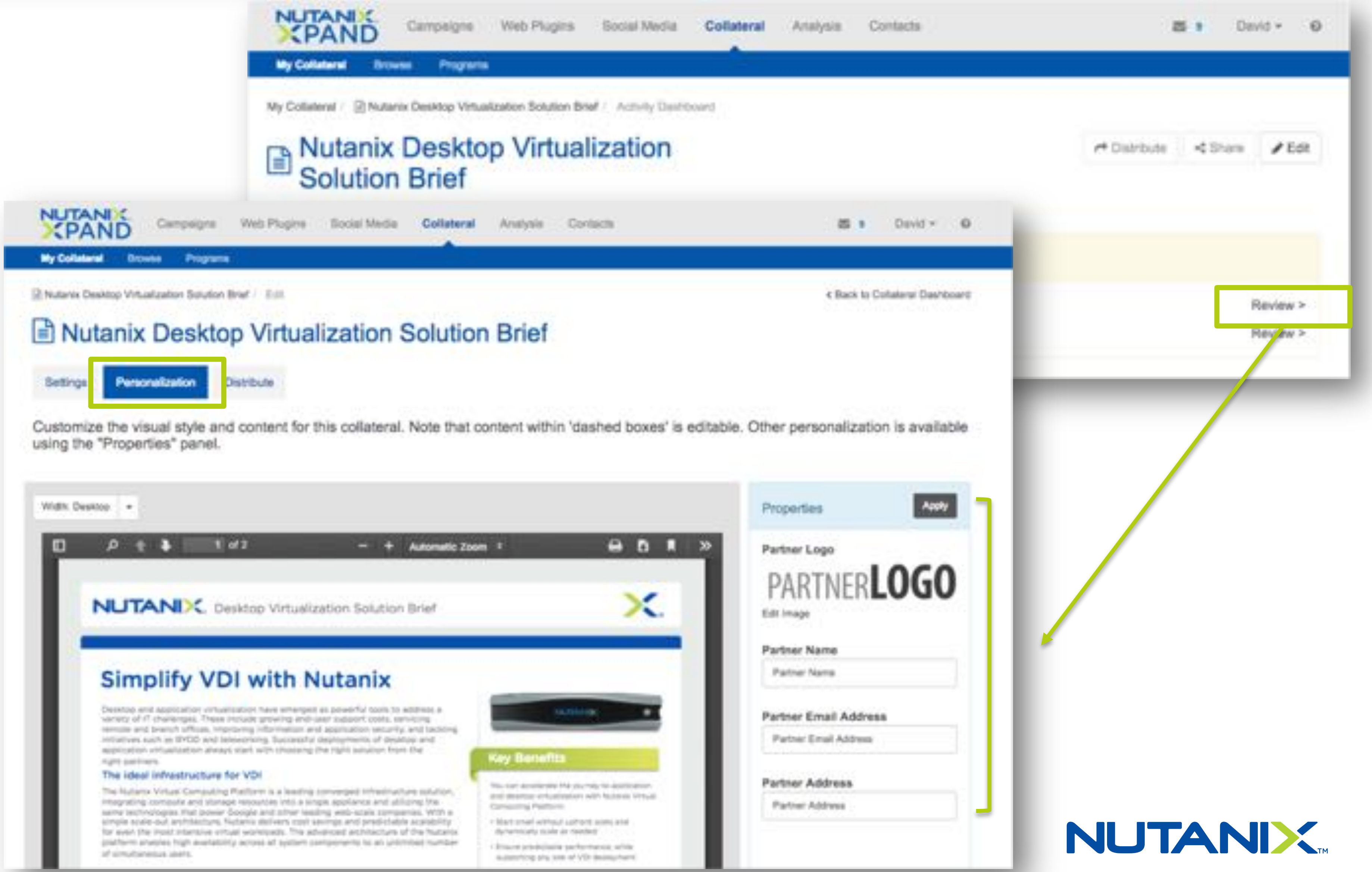


Customizing collateral in XPAND (#2)

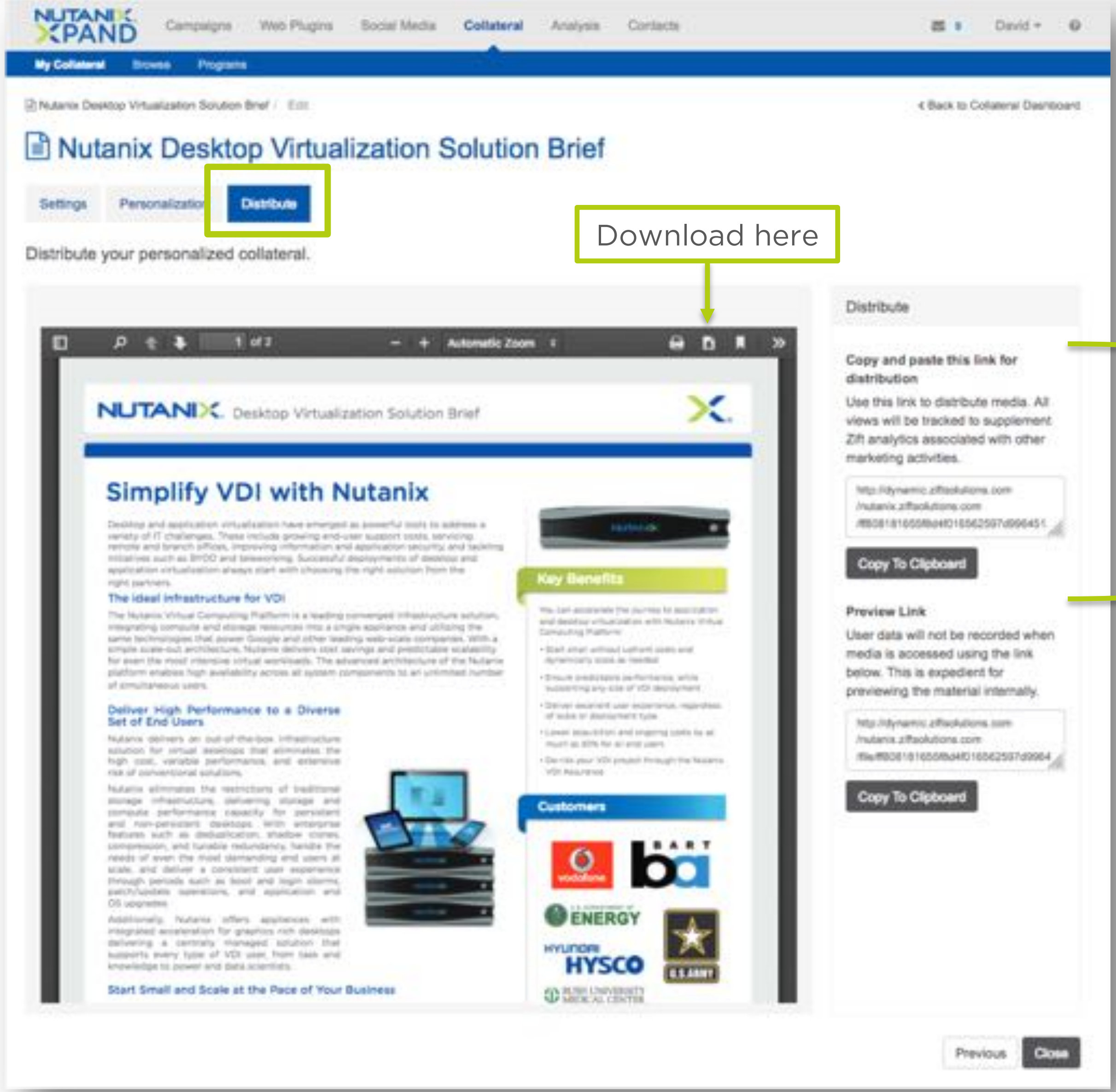
3. You'll arrive at the collateral dashboard

4. Click 'Review' and the wizard launches with fields for your logo and contact information.

5. Click 'Save & Next'.



Customizing collateral in XPAND (#3)



6. Finalize distribution settings.

Copy the first link.

This URL allows XPAND to track engagement whether you link it to an XPAND email or custom asset outside of XPAND.

You can also download the PDF using the download icon. Note: XPAND will be unable to track PDF engagement with this selection.

7. When done, click ‘Close’.

Understanding XPAND Analytics

A robust analytics suite

XPAND measures the success of your marketing campaigns. With its robust set of analytics, you can:

- Improve campaigns with visibility into tactic performance.
- Find out which combination of tactics works best.
- Identify new opportunities and ‘hot leads’.

Outputs include impressions, opens, clicks, form fills, performance overtime, and lead data.

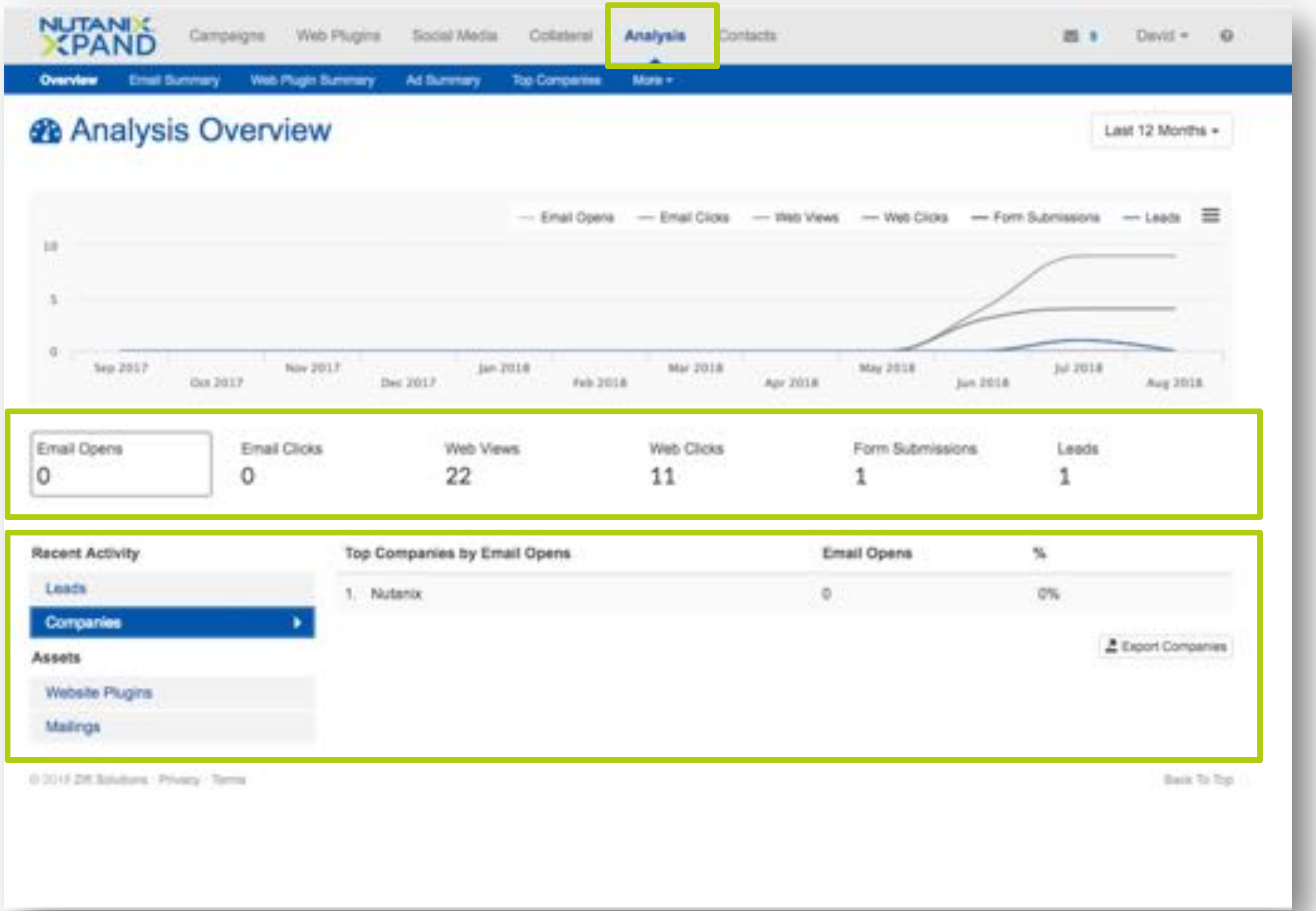
Reviewing your analytics (#1)

To review your campaign metrics, navigate to 'Analysis'. You'll see an overview of all activity.

Click the modules at the bottom and sort through different analytic graphs.

Sort through recent activity with the metrics below the graph.

Note: all social reporting is found exclusively in the 'Social Media' tab.



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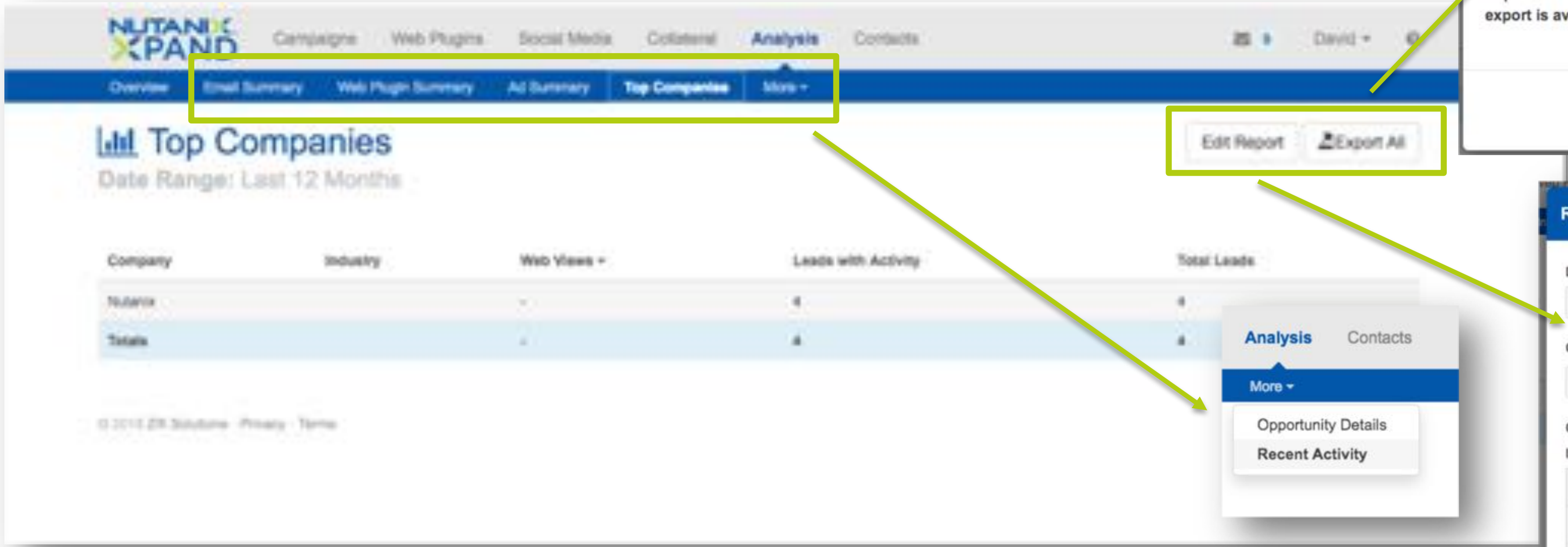
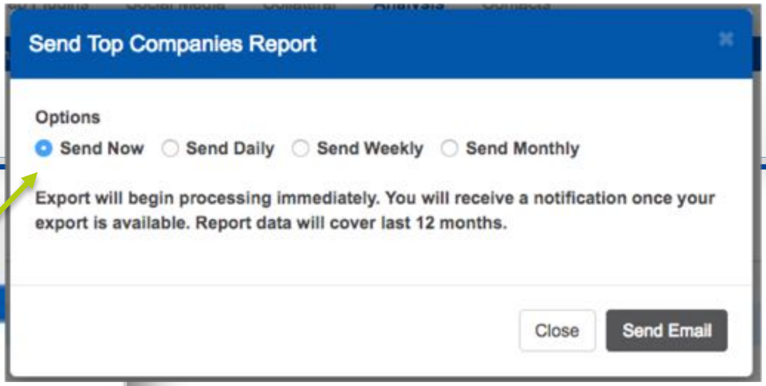
Reviewing your analytics (#2)





- Use the additional tabs in ‘Analysis’ to drill down on specific assets and demographic information.
- Under ‘More’, review lead opportunity details (note: optimize this setting by connecting your CRM) and an aggregate of recent activity in the 30 days.
- Customize your reporting criteria with the ‘Edit Report’ tab.
- You can also export and schedule reports using the ‘Export All’ tab.

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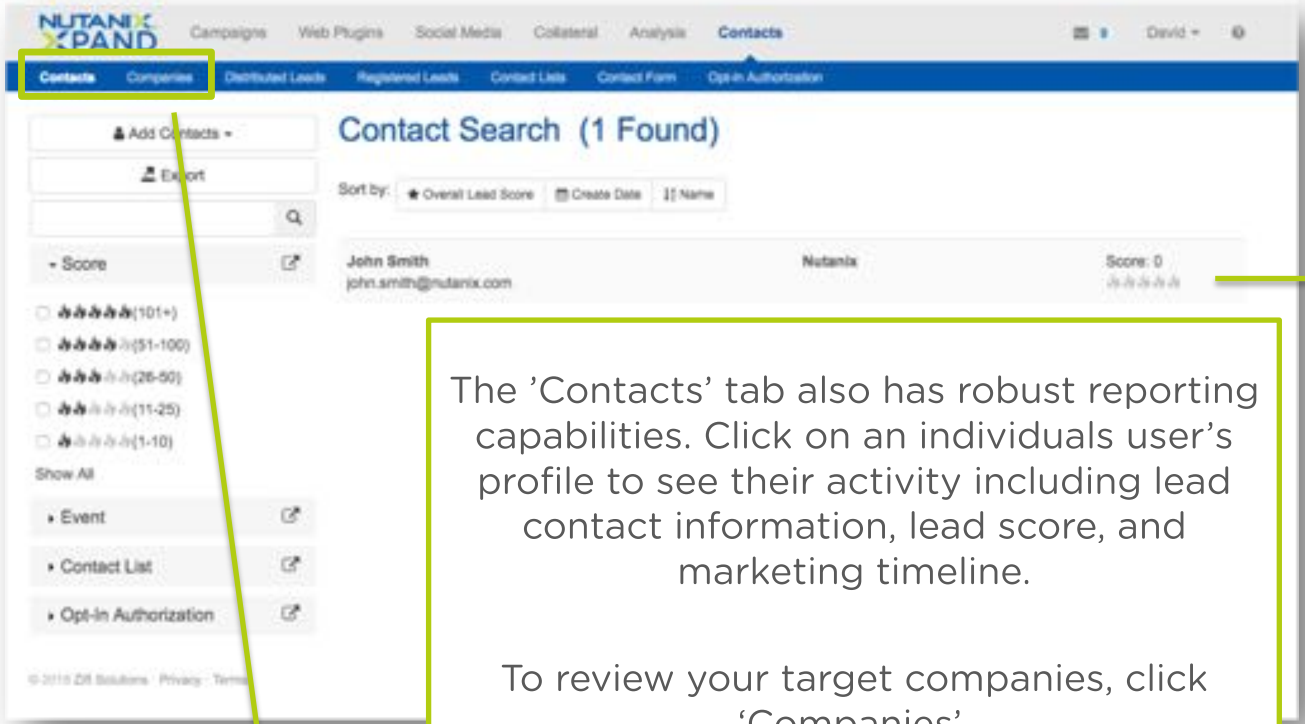
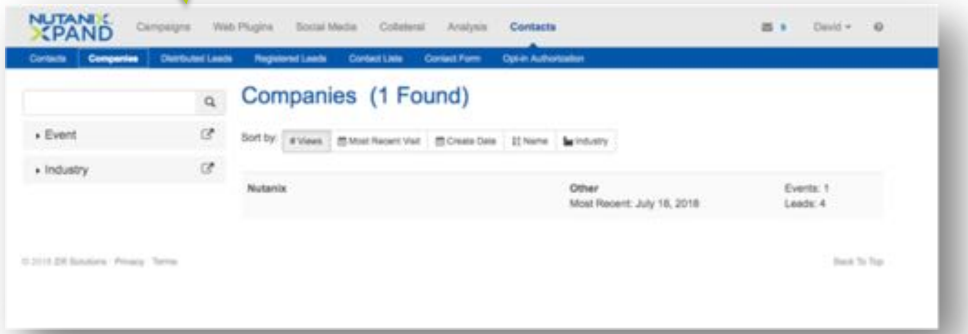
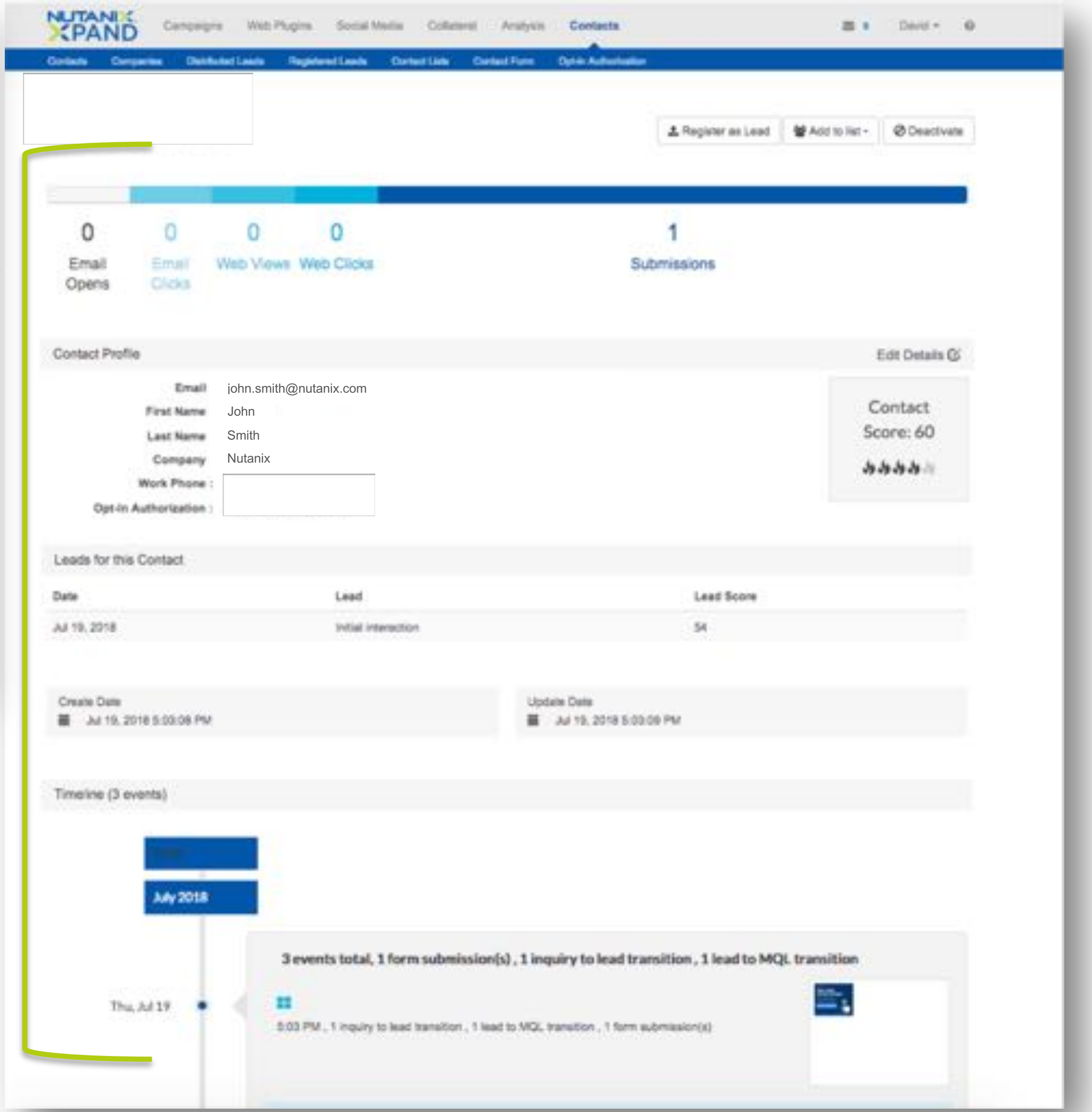
Reviewing leads



The 'Contacts' tab also has robust reporting capabilities. Click on an individuals user's profile to see their activity including lead contact information, lead score, and marketing timeline.

To review your target companies, click 'Companies'.

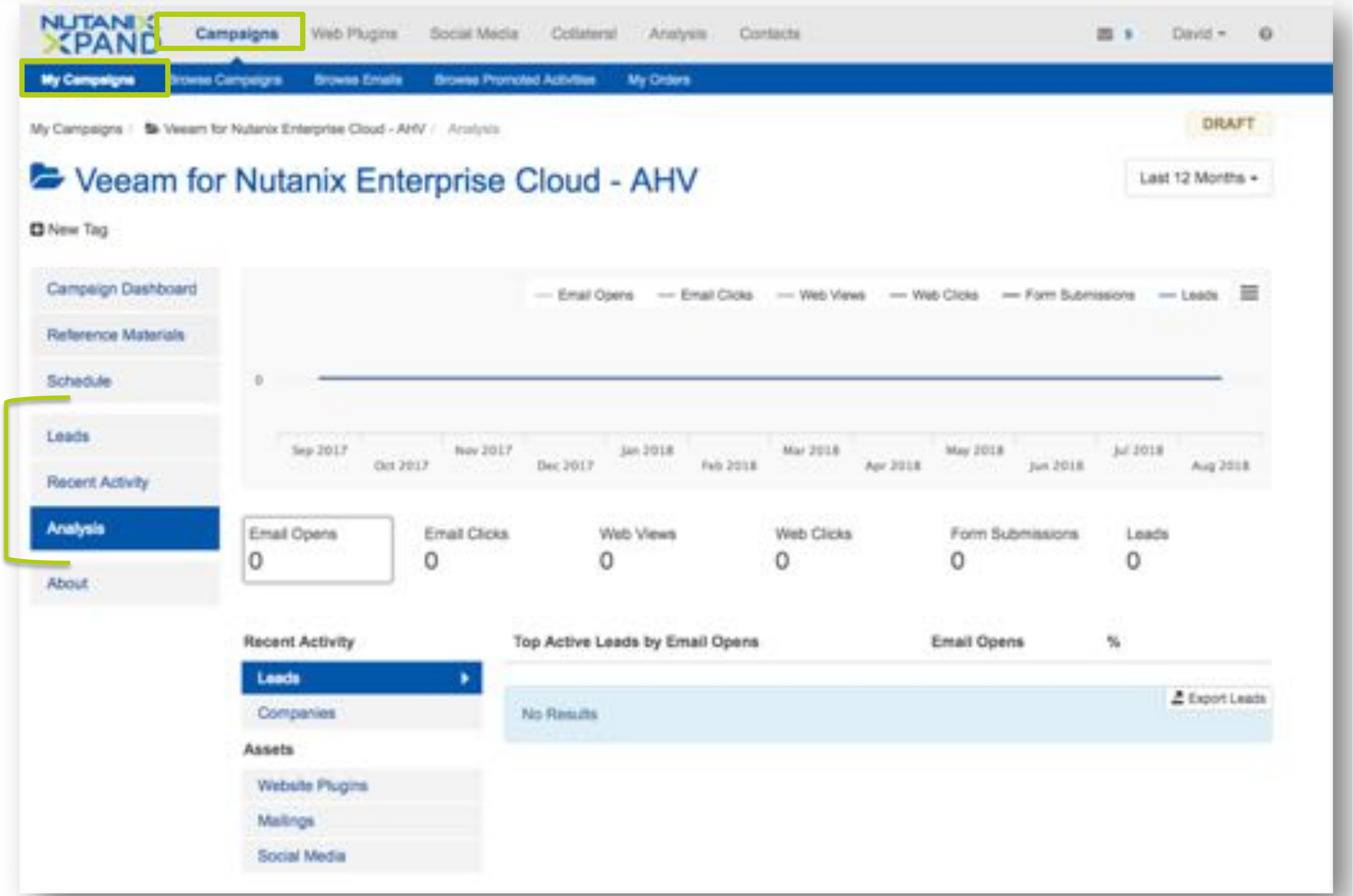




Reviewing campaign metrics

To review reporting metrics on specific campaigns, do the following:

1. Go to 'Campaigns', then 'My Campaigns'.
2. Locate the campaign you wish to review and click into it.
3. In the dashboard, review leads, recent activity, and overall analysis.



Adding a New User to Your XPAND Account

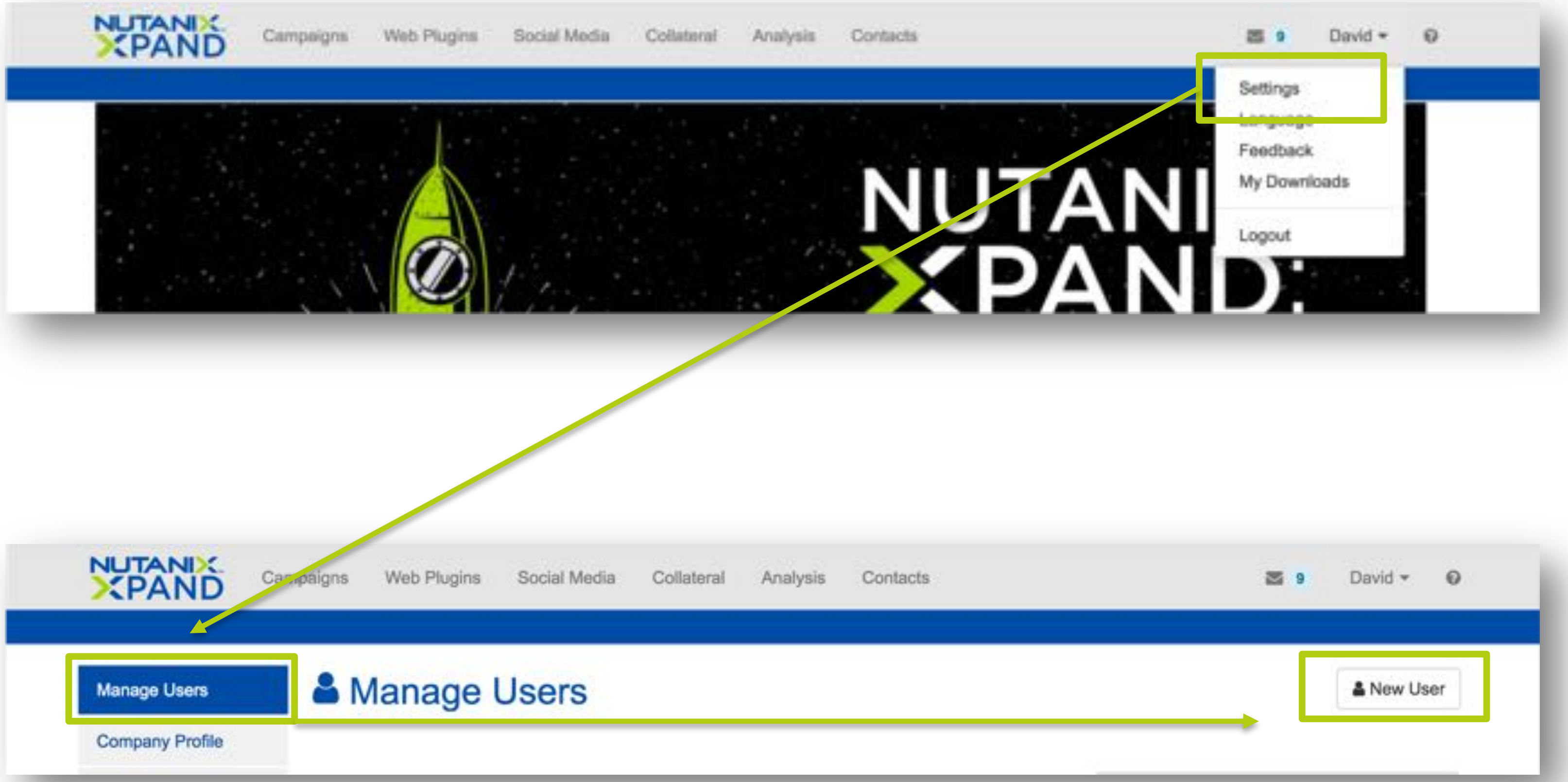
Aligning new users to your XPAND account (#1)

Have your XPAND administrator log into XPAND. If you don't know who your admin is, email xpand@nutanix.com.

1. Click 'Settings' in the dropdown next to your name.

2. Click 'Manage Users'.

3. Then click 'New Users'.



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Aligning new users to your XPAND account (#2)

4. Enter the new user's credentials.

5. Select his/her role. Access varies per role:

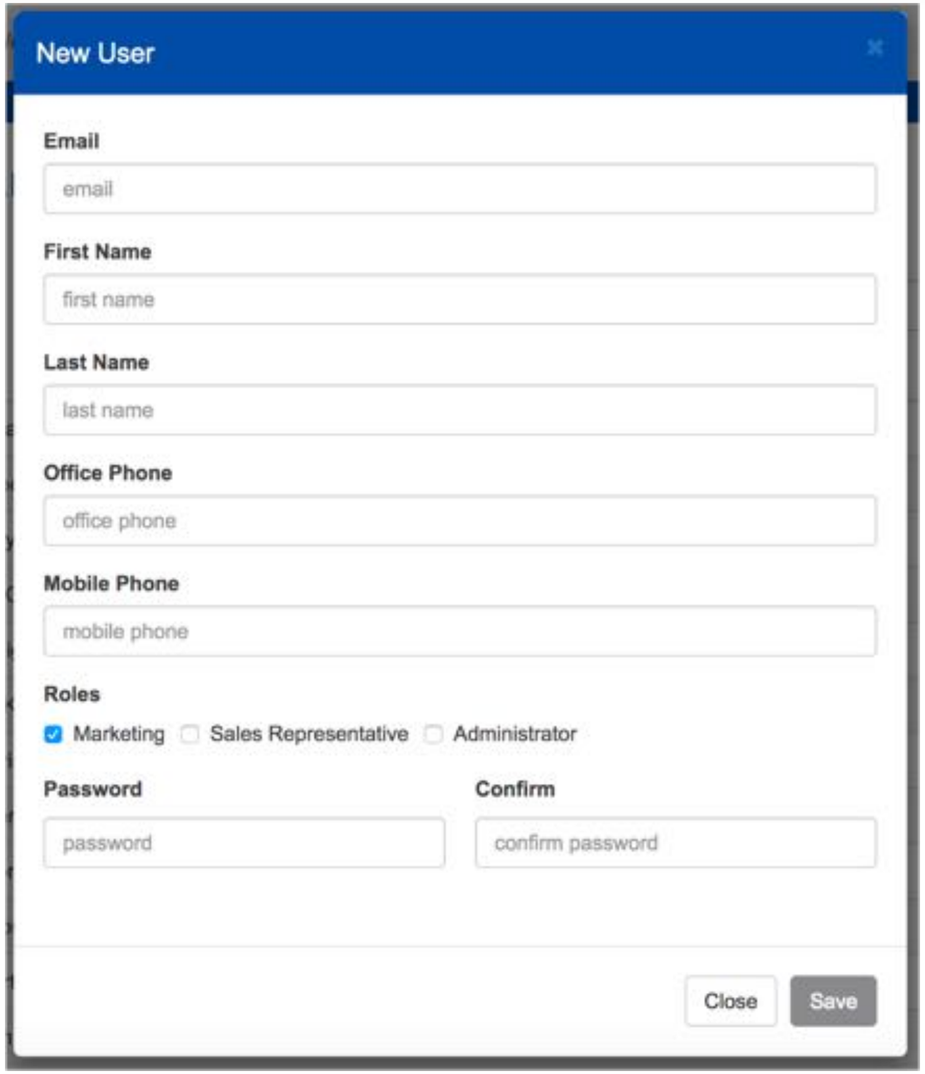
Administrator: Users have access to account settings. This includes company profile, lead management settings, mailing credits, CRM settings, app connectors, social settings, etc. They do not have access to marketing activities in XPAND. Most users with the administrator role are also assigned the marketing role in order to allow access to all of the pages, features, and content in XPAND (**highly recommended**).

Marketing: Users have access to all features and content in XPAND, but do not have access to high-level account settings that administrators have, as described above.

Sales Representative: Users have limited access to the features and pages in XPAND. Users are restricted to seeing only their assigned leads' profiles and event timelines in the Contact views. Sales Representatives can work their leads either through XPAND, email or their CRM.

6. Click 'Save'.

Note: you can add up to 3 user **admin** accounts.



Install Website Analytics

Track webpage activity with Website Analytics

XPAND 'Website Analytics' gives you insight on **all** visitor activity on **all** pages of your website. As contacts engage with both your XPAND marketing and website site, you'll see a holistic activity report in contact's timeline.

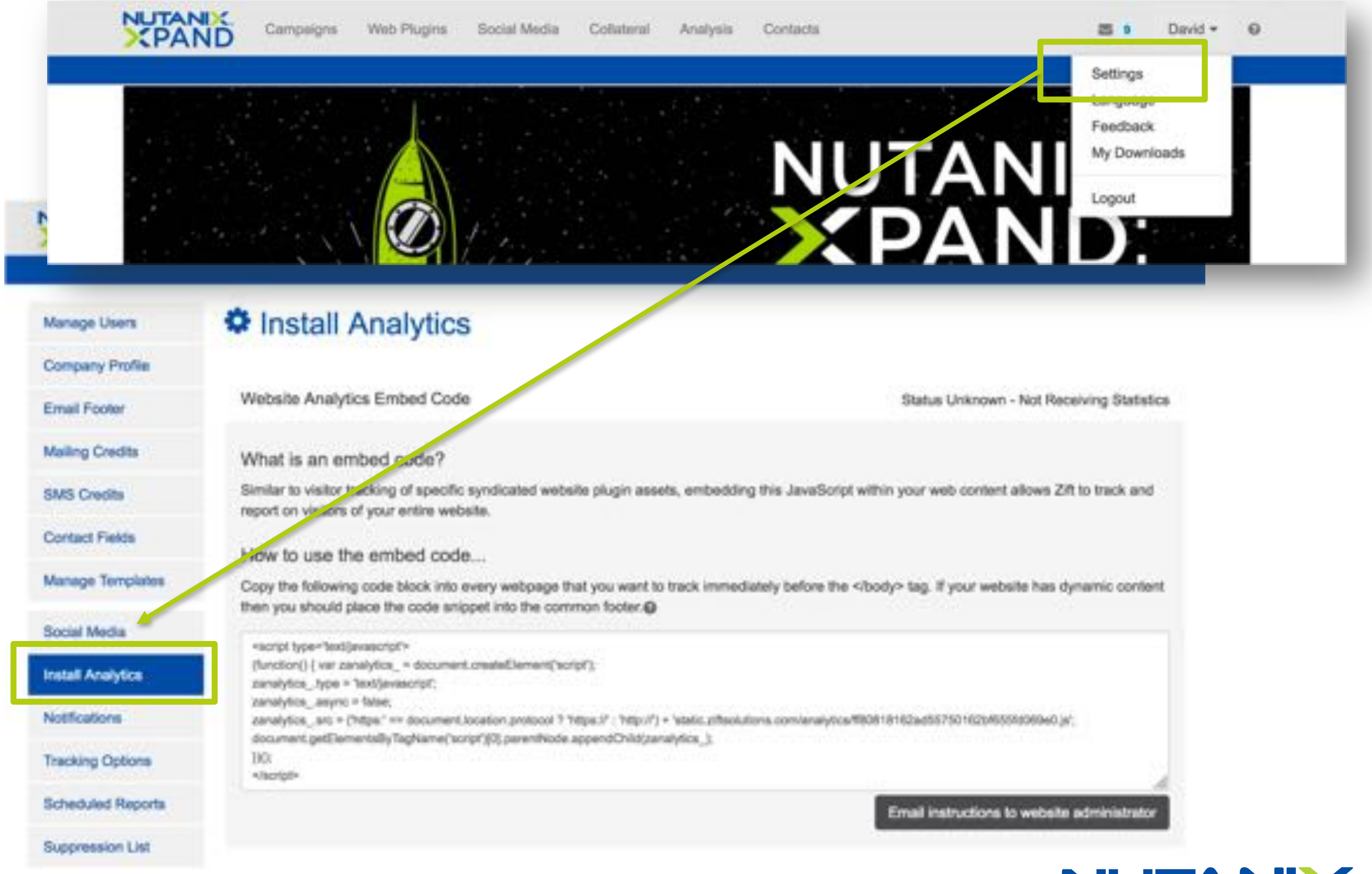
- Install the code on the your website footer to track all activity.
- Or, install it on a single page and track it individually.
- Tracking begins once the contact reveals himself, either by clicking on an email or completing any form. A cookie is then placed on the contact's computer and reporting starts.

Install Website Analytics (#1)

Have your XPAND administrator log into XPAND. If you don't know who your admin is, email xpand@nutanix.com.

1. Click 'Settings' in the dropdown next to your name.

2. Click 'Install Analytics'.



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Install Website Analytics (#2)

3. Copy the code onto the footer of your website to track the entire site. Or, place it on an individual webpage and track it singularly.

You can also email the instructions to your website administrator.

4. Once installed, XPAND will begin to track website activity after an individual “reveals” himself. Reporting is sent to the individual’s contact entry.

Use this data to further nurture.