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Co-op Fund Management Module

Overview

The Channel Fusion Co-op Fund Management module leverages more than 20 years of experience in delivering the most flexible and scalable solution in the industry. The module easily integrates with a variety of data sources to provide brands with full visibility and management of their co-branded/co-marketing initiatives.

Supporting the Co-op Fund Management module is a comprehensive tech-enabled service offering, where the Channel Fusion support team becomes an extension of a brand's internal channel marketing team. The team of dedicated Channel Support Specialists become experts in a client's program and are intimately familiar with a brand's co-op program guidelines and goals.

In addition to providing high-touch front-line service and support, the Channel Fusion account management team serves the strategic and overall program needs of the brand as well. This includes periodic business reviews (quarterly, semi-annually, annually) to discuss:

- The state of the program(s) since the last review including key performance indicators related to:
  - Claim status
  - Audit outcomes
  - Support volumes
  - Funds allocated
- Feedback obtained from channel partner interactions, including satisfaction survey results
- The brand's desired future state and initiatives for the program
- Strategic recommendations and adjustments based on all available data and insights

The Channel Fusion Co-op Fund Management module comes with all of the expected functionality surrounding claim submission, status checking, and subsequent reporting, but it can be configured for the unique requirements of each client's program. Designed to handle even the most complex programs and business rules, the Co-op Fund Management module easily manages different types of accruals and funds. Examples of accrual rules include, but are not limited to:

- Fund types (BDF, co-op, brands/divisions, product, etc.)
- Partner levels (Platinum, gold, etc.)
- Periods (monthly, quarterly, annual)
- Rolling accruals)

The Co-op Fund Management module also facilitates precise accrual tracking to help clients optimize their program investments by accepting any type of file and frequency required to keep fund balances updated in real-time (daily, monthly, quarterly, annually).

Co-op Fund Management Module Core Features

While there are similarities among co-op programs, they can vary widely from one company to another. The Channel Fusion Co-op Fund Management module allows brands to leverage core features while meeting unique business and program requirements.

Claim Status

Channel partners can check the status of their claims on the co-op portal. They have the option to simply look at their claims or drill down into the details to see why a claim was approved, denied or if the submission was incomplete.

Claim Submission

The module allows channel partners to submit their claims online in a simple, wizard-based, step-by-step process.

Step 1 – The channel partner enters the pertinent activity information. Depending on the activity selected, the proof of performance submission requirements is displayed in real-time so the user can upload all relevant documents. The partner can also select a pre-approval number if one has been authorized.

Step 2 – The channel partner uploads the required proof of performance and payment documents. The system informs the partner which type of file formats can be uploaded as well - PDF, JPG, PNG, for example.
For the optional optical character recognition feature, the channel partners proof of payment first followed by proof of performance.

Step 3 – The channel partner previews and submits the claim or can add another activity to the same claim.

Step 4 – The system provides confirmation that the claim is submitted successfully and also provides a unique tracking number the channel partner can use to check on the status of the claim. The user can check the status of their claims in real-time. The system also displays a list of all claims and related activities along with any payment information, if applicable. When the user clicks on the activity link, they can drill down and see all the details captured on the activity along with any uploaded documentation.

Pre-Approvals

By getting an ad pre-approved, channel partners can run their campaign knowing it complies with the program guidelines and, therefore, is eligible for co-op reimbursement.

The co-op module allows channel partners to submit and check the status of their pre-approvals online as well.

The channel partner gets immediate electronic notification of the request submission and funds can be deducted automatically upon approval. The channel partner can also check on the status of their request in real time, correct anything that does not comply with program guidelines and resubmit the claim, as necessary.

Claim Adjudication

Once a channel partner submits a claim or preapproval, it ends up in an auditing queue to be approved or denied by a team of dedicated support specialists. These specialists become experts in a program's guidelines and are able to guide the auditing process to verify program compliance.

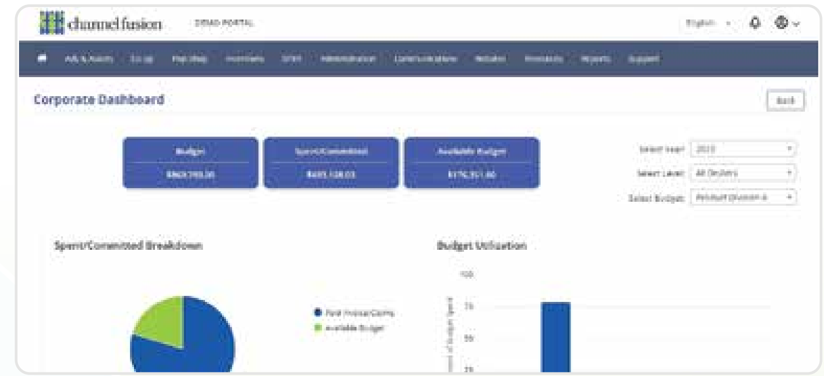
Once a claim is approved or denied, an automated email notification is sent to a channel partner.

For claims marked incomplete, the support specialists facilitate discussions with the channel partner to ensure an understanding of the rationale and also help them edit the claim, when possible, to make the claim eligible for approval.

Processing Services

Channel Fusion provides high touch co-op program management and administration services. An extensive claim verification, processing and payment process includes are checks and balances for each step to ensure maximum accuracy. The Channel Fusion operations team carefully reviews each claim to ensure it follows proper compliance and program guidelines and any exceptions are passed on to the appropriate client contact.

Reporting



The Co-op Fund Management module provides a comprehensive suite of standard online reporting and analytic options. Custom reporting is also available based on a brand's specific requirements.

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