

# Canalys LATAM Channel Leadership Matrix 2020

## Summary

**Four vendors have been crowned Champions in the 2020 Canalys LATAM Channel Leadership Matrix: Cisco, Kaspersky, Lenovo and Nutanix.**

The impact of the pandemic has shone a light on vendors' commitment to their channel partners. Champion status recognizes those vendors that show the highest level of excellence in channel management, while supporting their partners' most urgent needs through the crisis, including supply, financial support, ease of doing business and account management relationships.

A vendor's position in the Canalys Leadership Matrix is based on partner feedback to the Canalys Vendor Benchmark, combined with a detailed assessment of their channel activities by Canalys analysts. **Champions** have the highest ratings in the Vendor Benchmark, and demonstrate consistently high levels of partner support and engagement. **Contenders** have higher ratings than average but have seen those ratings decline year on year. **Scalers** (formerly **Growers**) have seen their ratings improve, but either have yet to achieve the highest ratings in the benchmark or cannot yet demonstrate consistently strong channel engagement. **Stragglers** are vendors with the lowest ratings that have seen their channel performance decline over the research period and have suffered a deterioration in partner sentiment.

The Champions of 2020 span a range of technology segments, including PCs, networking, data center infrastructure, software and security. But they all exhibit some common characteristics, including a majority share of indirect revenue, a strategic commitment to partner-led business models, and a corporate-wide focus on increasing investments in partner channels.



## LATAM Channel Leadership Champions 2020

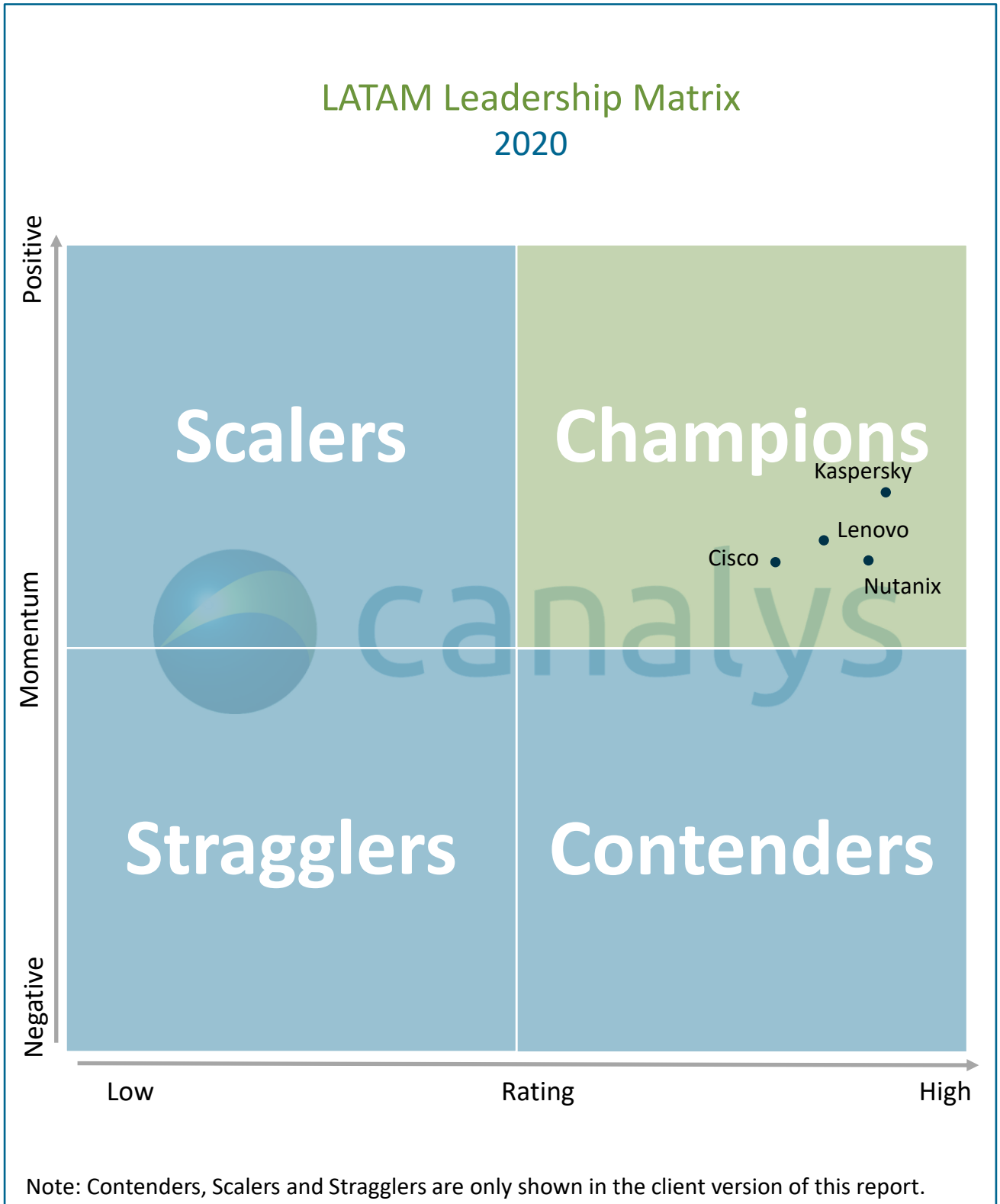


kaspersky

Lenovo

NUTANIX

## Canalys Leadership Matrix



## LATAM performance highlights – Champions

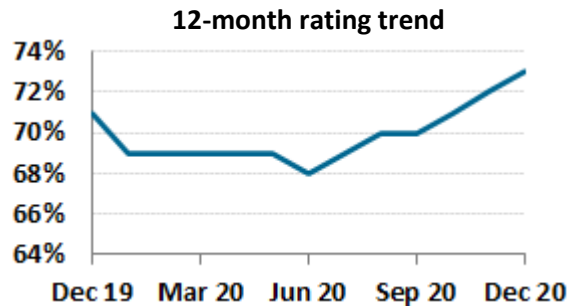


VB rating  
December 2020:  
**73%**

Number of  
responses:  
**59**

✓ **Highest rated benchmark metrics (out of 10)**

- Quality of technical support (8.1)
- Usefulness of portals and tools (8.0)
- Accreditation and specialization programs (7.8)
- Effectiveness of account management (7.4)
- Growth through service and support (7.2)



Cisco has faced a challenging year, as parts of its business – particularly on-premises networking and data centers – have come under sustained pressure during the pandemic. But its collaboration business has been a bright spot and Cisco has maintained its focus on its partners during the crisis as part of its “Perform and Transform” strategy. This prioritizes current partner success as well as helps partners create new business models for the future as Cisco continues to transition toward services and subscriptions. It has extended partner payment terms, launching deferred payment schemes via Cisco Capital and protected partner program tier status for a year, to help partners navigate cashflow challenges. It announced a new partner program structure that will better reflect partner roles.

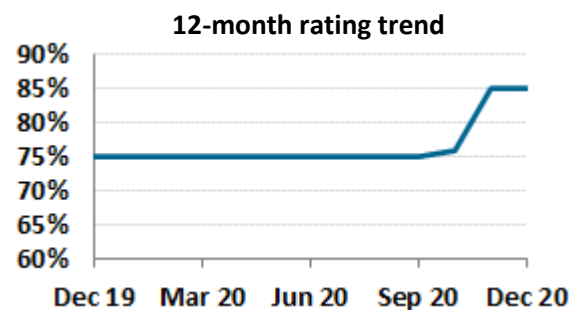


VB rating  
December 2020:  
**85%**

Number of  
responses:  
**38**

✓ **Highest rated benchmark metrics (out of 10)**

- Product availability and supply (9.1)
- Accreditation and specialization programs (9.0)
- Margin retention and profitability (8.9)
- Ease of doing business (8.7)
- Effectiveness of account management (8.6)



Kaspersky has fostered a highly committed and satisfied partner base, supported by ongoing improvements and continued investment in its United Partner program and a new partner portal. Partner feedback on rebates has also been positive. Building an MSP community is a key area of focus for the vendor. Kaspersky has also introduced new billing models and increased investments in terms of hiring dedicated account teams across the region.

The newly launched partner portal provides access to reporting dashboards, documents, an on-demand multi-lingual training library, marketing content, automated deal registration and MDF processing. A multi-region lead-generation program was also implemented.

## LATAM performance highlights – Champions



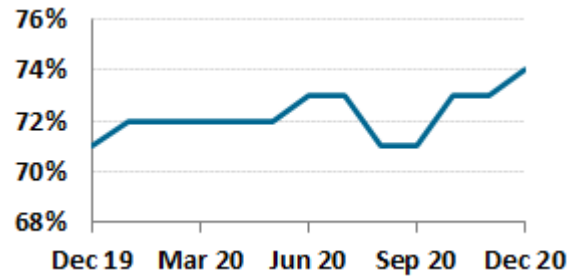
VB rating  
December 2020:  
**74%**

Number of  
responses:  
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✓ **Highest rated benchmark metrics (out of 10)**

- Accreditation and specialization programs (7.9)
- Effectiveness of account management (7.7)
- Ease of doing business (7.6)
- Quality of technical support (7.5)
- Usefulness of portals and tools (7.5)

12-month rating trend



Lenovo’s supply chain excellence has been a key differentiator for partners in 2020, when competitors have struggled to fulfil demand. But Lenovo’s Champion status also reflects its channel commitment. Over 90% of sales are via partners, one of the highest indirect shares among its peers in both data center and client. It has invested heavily to improve ease of doing business via Velocity, a global project to automate and digitize processes. It recently launched a unified partner portal for data center and PC partners, and has invested successfully in lead generation to support run-rate growth for SMB and mid-market partners. But a greater reliance on digital tools can bring new challenges, and maintaining Champion status next year will require even greater effort by Lenovo as rivals recover. It also needs to formalize a partner model for its TruScale “as-a-service” offer.



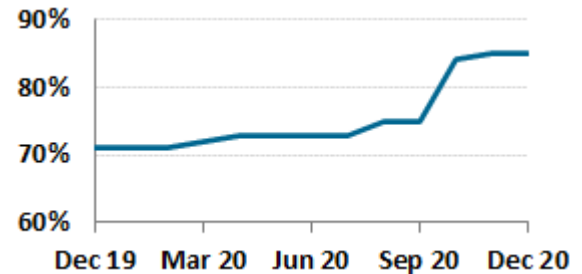
VB rating  
December 2020:  
**85%**

Number of  
responses:  
**55**

✓ **Highest rated benchmark metrics (out of 10)**

- Accreditation and specialization programs (9.0)
- Quality of technical support (9.0)
- Product availability and supply (8.8)
- Usefulness of portals and tools (8.6)
- Marketing and lead generation (8.5)

12-month rating trend



Nutanix has strengthened its position in LATAM in 2020. It introduced a new global partner program, Elevate, in 2020. Its partners have benefited from growth trends, including VDI, during the crisis. It must now focus on capitalizing with partners on the expansion of its portfolio into areas such as hybrid cloud and databases. The new program brings streamlined tiers, improved profitability and simplified deal registration, which positions it well for the future.

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## About the Canalys Leadership Matrix



The Leadership Matrix assesses vendor performance in the channel, based on channel feedback into the Vendor Benchmark over the last 12 months, and an independent analysis of vendor channel strategy, investment, execution and planned initiatives by experienced Canalys analysts. The Vendor Benchmark tracks leading technology vendors around the world, collating the experiences that channel partners have when working with different vendors. Channel partners are asked to rate their vendors across the 10 most important areas of channel management (ease of doing business, profitability, support, marketing, etc).

The Canalys Leadership Matrix provides a graphical representation to assess the performance of each vendor over time, and positions them in one of four categories:

- **Champions:** Vendors with high Vendor Benchmark scores, which have shown both continued improvement in channel management, strategy and execution, and a commitment to driving future improvements.
- **Contenders:** Vendors with high Vendor Benchmark scores or a strong channel business, but which have seen declines in channel sentiment and/or a deterioration in channel commitment or execution.
- **Scalers:** Vendors with low Vendor Benchmark scores, but which have seen improvements in channel sentiment and performance.
- **Stragglers:** Vendors with low Vendor Benchmark scores, which have seen channel sentiment and/or performance deteriorate or stagnate.

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