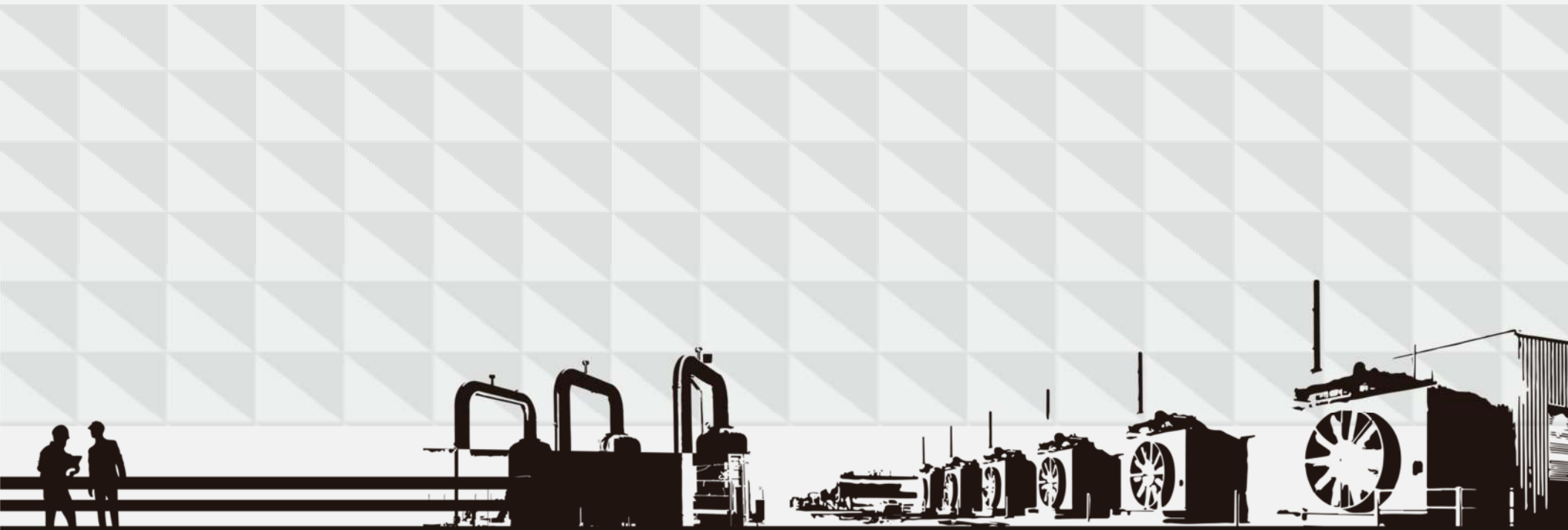




2022 Channel Account Plan (AP) Training

For INNIO's Authorized Channels Only



Megan Hinterberg

September 28, 2021

Confidential information

This document is only intended for viewing by
INNIO's Authorized Channels.

Please do not forward or share this presentation
with anyone outside of your company.

Title
Subtitle

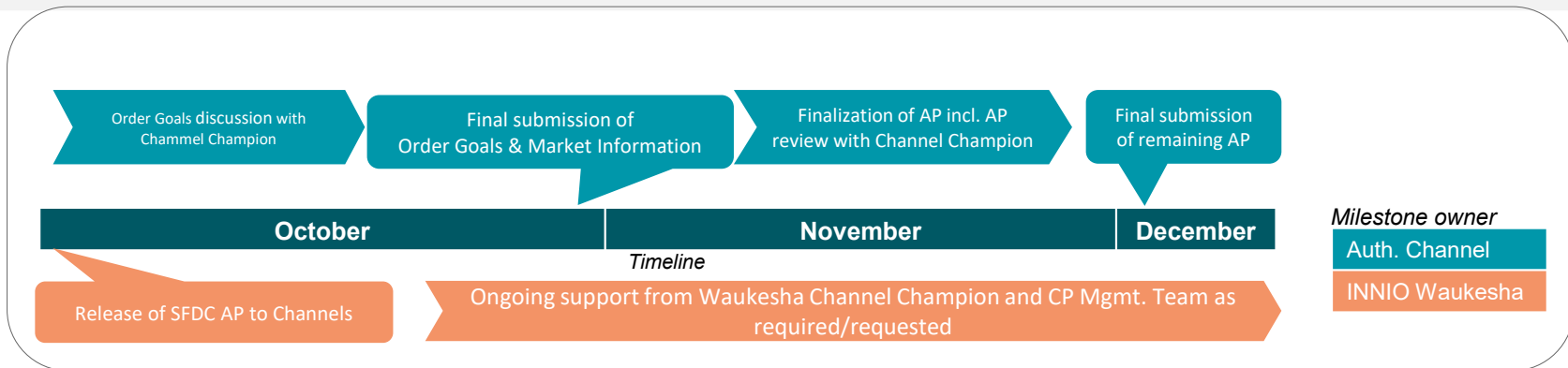
AGENDA

- 1. Milestones and ground rules for AP process**
- 2. Overview of main changes vs. 2021 AP**
- 3. Guideline how to access the SFDC AP**
- 4. Guideline on the AP content**

2022 Account Plan Schedule & Milestones



2022 Account Plan Schedule Milestones



Important Milestones	Owner	Timeline
#1 Release of SFDC AP to Channels*	Waukesha	By October 1st
#2 Final submission of Order Goals & Market Information*	Authorized Channel	October 25th
#3 Full submission of AP prior to AP review	Authorized Channel	As agreed with Waukesha Channel Champion
#4 AP review with Channel Champion & CP Mgmt Team	Authorized Channel & Waukesha Team	As agreed with Waukesha Channel Champion
#5 Final submission of remaining AP as approved by Waukesha	Authorized Channel	December 3rd

*AP trainings on demand as per Channel request

The overall AP process is characterized by strong interaction and collaboration between Waukesha and the Authorized Channel



2022 Account Plan ground rules

Rules for 2021 Account Plan process:

- Latest by Monday, October 25th: All Order Goal including Market Information
- Latest by Friday, December 3rd: All remaining AP content submitted by Channels

Rules for the Account Plan content:

- All fields in the Account Plan shall be considered as mandatory to be filled in for Distributors and Platinum Solution Providers
- All financial commitments are to be provided in full numbers
- If the content of the AP refers to yearly data, use the following guideline to ensure the same understanding:

AP language		Year to consider
"Prior year"	=	2020
"Current year"	=	2021
"Upcoming/next year"	=	2022

2022 Account Plan Changes



Main changes vs. 2021 AP

(excluding changes in timeline and dates)

- Account Plans are now easier accessible with SSO login in the new [SFDC Channel Portal](#) (see page 10 for more details)
The former Portal was deactivated at the end of September.
- **Market information** submission due by October 25th (includes segment size, share, drivers, service event forecast)
A good understanding of the market is critical to our joint planning process; thus, we want to drive this discussion early on

Guideline on How to Access the AP in SFDC

- **SFDC Access**
- **Log-in to SFDC Commercial Community**
- **Find and open your annual Account Plant**



Ensure you have SFDC Access

- If you do not have access to SFDC:
 1. First make sure that you have an active INNIO SSO account ([Link to SSO registration](#))
 2. Request access to “Salesforce Waukesha”, within the request choose “Commercial” access ([Link to access request page](#))
 3. Once your SFDC access is approved, you can access your Account Plan via the following link:
<https://channels.innio.com/>
- In case you experience any issues, or your Account Plan is not visible in the Portal, please
 - consult the guideline for SSO account registration and SFDC access request
 - contact your Channel Champion or regional sales manager or customer service manager
 - contact Max Liberman (Max.Liberman@innio.com)

Log-in to SFDC Portal

<https://channels.innio.com>



Log In Using

[INNIO SSO \[Service\]](#)

[Log In with a Different Account](#)

INNIO employee? [Log In](#)

Log-in:

Use your INNIO SSO and password

In case you forgot your INNIO SSO password, use the "Forgot my password" functionality that shows during the SSO login procedure and follow the steps.

The screenshot shows the password entry step of the login process. At the top is the INNIO logo. Below it is a back arrow and the email address 'michael.steurer@innio.com'. The main heading is 'Enter password'. There is a password input field with the placeholder text 'Password'. Below the input field is a link for 'Forgot my password'. At the bottom right is a blue 'Sign in' button.

Navigation in SFDC Portal

After successful login, click on "Account Plan," choose "All 2022 Waukesha Account Plans." Click on your 2022 Account Plan

The screenshot shows the SFDC Portal interface with three numbered callouts:

- 1**: Points to the "Account Plan" link in the top navigation bar.
- 2**: Points to the "All 2022 Waukesha Account Plans" dropdown menu in the left sidebar.
- 3**: Points to the "2022 Account Plan Test" item in the list of account plans.

Account Plan Name	Account	Main Channel A...	Status
1 <input type="checkbox"/> 2022 Account Plan Test	INNIO WAUKES	Megan Hinterberg	Released

Account Plan Details for 2022 Account Plan Test:

Field	Value
Account Plan Name	2022 Account Plan Test
Status	
Account	INNIO WAUKESHA GAS ENGINES INC
Account Number	1943
Owner	Megan Hinterberg
Currency	USD - U.S. Dollar
Year	2022
Tier 4 P&L	Waukesha



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2022 Waukesha Account Plan Training

Guideline on the AP content

Timeline:

- Content on Pages 15 - 19 due by October 25th
- Content on Pages 20 - 29 due by December 3rd



Basic AP information

The top section of the Details tab shows the basic information concerning the Account Plan

1. Please check the currency that is set in the Details tab because this is the leading currency for all monetary related AP input. It should be USD.
2. Please review the basic information and let us know of any of questions or errors.


DETAILS	RELATED	ORDER GOALS & MYA COMMITMENTS
Account Plan Name 2022 Account Plan Test		Owner Megan Hinterberg
Status		Currency USD - U.S. Dollar
Account INNIO WAUKESHA GAS ENGINES INC		Year 2022
Account Number 1943		Tier 4 P&L Waukesha
Channel Type - Level 1 Value Added Reseller (VAR)		Waukesha Gas Engine <input checked="" type="checkbox"/>
Channel Type - Level 2 GCPP Platinum		Services Waukesha <input checked="" type="checkbox"/>
Tier Platinum		Main Channel AP contact
Region North America		Main INNIO AP contact Megan Hinterberg
Sub Region USA		Innio Account Owner Paul Beck
Country UNITED STATES		Regional/Programs Approval <input type="checkbox"/>
Country Comments		HQ Approval <input type="checkbox"/>



Order Goals including MSA/CSA and Digital Submission of Order Goal commitments by October


1. Click on the Order Goals & MYA Commitments tab.
2. Click on the pencil in each cell to enter/edit the value. Please provide values in full numbers. (ex: not in millions)
3. After editing, click “Save” to save data and show calculations for “Total Sum” and “Total Service” for Order Goals.

DETAILS RELATED **ORDER GOALS & MYA COMMITMENTS**

 Order Goals (in full numbers)

Name	1Q	2Q	3Q	4Q	Total
1 Equipment	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2 TX Parts Orders	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
3 MSA Parts Shipments	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4 Overhaul/Repair	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5 CM&U	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
6 Field Service	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7 Digital	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8 reUp Parts & Engines	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Total Sum: \$0.00
Total Service: \$0.00

Comments Order Goals 

Multi Year Agreements Commitment
What is the value of MYA contracts you plan to close and what is in the pipeline at this point?



Order Goals including MSA/CSA and Digital Submission of Order Goal commitments by October

1. Please check the currency that is set in the Details tab (should be USD) as this is the leading currency for all monetary related AP input.
2. Please review the basic information and let us know in case of any questions.

DETAILS RELATED **ORDER GOALS & MYA COMMITMENTS**

 Order Goals (in full numbers)

	Name	1Q	2Q	3Q	4Q	Total
1	Equipment	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2	TX Parts Orders	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
3	MSA Parts Shipments	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4	Overhaul/Repair	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5	CM&U	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
6	Field Service	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7	Digital	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8	reUp Parts & Engines	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Total Sum: \$0.00
Total Service: \$0.00

Cancel Save

Comments Order Goals ⓘ



Market Information & Service Entitlement

Understanding the market will help during the discussion of the Order Goal commitments

Market Information

1. Indicate Positive and Negative trends in your region
2. Provide more insights on influence in the market from other Engine Manufacturers
3. Share Waukesha HP – only if applicable

▼ Market Information & Service Entitlement

Marketplace Positive Trends

Marketplace Negative Trends

Policy/Government Incentives

Influence from other engine OEMs

Total Horse Power Add ⓘ

Waukesha Horse Power Add ⓘ



Market Information & Service Entitlement cont.

Understanding the market will help during the discussion of the Order Goal commitments


Power Generation and Install Base – Mandatory

Fill out Power Generation Section


Fill out Install Base Section

- Upload current IB if available

Power Generation segment for Waukesha in your region


List Specific PG Segments & Applications 


WK offerings advantage vs competition


WK support needed for PG development 

Install Base / Service Entitlement

Number of active WK units in your region

10 

Total Number of Active Units you Service 

2 

Market Information & Service Entitlement cont.

Understanding the market will help during the discussion of the Order Goal commitments

Service Event forecast

Provide your forecast of the absolute number of service events actually taking place during the upcoming year in the respective categories:

- Minor Overhaul and Major Overhaul based on your customer/end user schedules

▼ Segment Event Forecast

Service Event Forecast ⓘ

<input type="text" value="10"/>	
VHP Minor Overhaul	VHP Major Overhaul
<input type="text" value="1"/>	<input type="text" value="1"/>
VGf Minor Overhaul	VGf Major Overhaul
<input type="text" value="1"/>	<input type="text" value="1"/>
275GL Minor Overhaul	275GL Major Overhaul
<input type="text"/>	<input type="text"/>

Service Excellence – Inventory, Special Tools, Warranty Cases, myPlant

This section captures the mandatory DPPP targets and facilitates the continuous focus on Service Excellence

1. Focal point/mandatory: Waukesha Inventory Levels current and planned for 2022, Special Tools, Accepted Warranty Cases.
2. Fill out myPlant related fields only if applicable or if you have information

Service Excellence KPIs

% Engine availability ⓘ	<input type="text"/>	Total no. of active units ⓘ	<input type="text"/>
Spare parts inventory Actuals ⓘ	<input type="text" value="1,000"/>	% Units updated in last 12 months OP ⓘ	<input type="text"/>
Spare parts inventory OP ⓘ	<input type="text" value="800"/>	% Units sending continuously data OP ⓘ	<input type="text"/>
% Gap - Special Tools ⓘ	<input type="text"/>	% Remote Monitoring Actuals	<input type="text"/>
% Accepted warranty cases OP	<input type="text"/>	No. of engines served by Third Party	<input type="text" value="2"/>
% MYA Coverage of fleet OP	<input type="text"/>		

Business Information & Resources

The “Business Information & Resources” section allows for a better understanding of your organization setup

1. Enter the main contacts for your organization to ensure we have the right contacts for Channels/Commercial Communication
2. Please provide the number of resources you deploy for the Waukesha product line. This allows us to better understand how your organizational setup enables the support of the Waukesha product line.
3. Click on “Save” to calculate the “Total sum of resources”.

Business Information & Resources

Business Information

Who are your main contacts in the following areas?

General Manager	General Manager Email	Business Resources	
<input type="text"/>	<input type="text"/>	How many employees (full-time equivalent) in your organization are dedicated to Waukesha products? (ex: 2x Field Technicians who are deployed 50% for Waukesha products can be summarized as 1 Field Tech)	<input type="text"/>
Sales Manager	Sales Manager Email	Equipment Sales Resources	<input type="text"/>
<input type="text"/>	<input type="text"/>	Equipment Application Engineering	<input type="text"/>
Svc Manager	Svc Manager Email	Service Sales Resources	<input type="text"/>
<input type="text"/>	<input type="text"/>	Svc Application Engineering	<input type="text"/>
Marketing Manager	Marketing Manager Email	Field Svc Support	<input type="text"/>
<input type="text"/>	<input type="text"/>	Other resources	<input type="text"/>
Finance Manager	Finance Manager Email	Total sum of resources	0
<input type="text"/>	<input type="text"/>	Comments Resources Setup	<input type="text"/>

Field Technicians	<input type="text"/>
24/7 hotline & troubleshooting	<input type="text"/>
How is service hotline executed?	<input type="text"/>
Number of Service Centers in your region	<input type="text"/>
Ability to be at sites within 24 hours	<input type="text"/>
Revenue with Waukesha products	<input type="text"/>



Business Information & Resources cont.

The “Business Information & Resources” section allows for a better understanding of your organization setup

Business Resource Section

Contacts:

- Training Manager/Coordinator contact – Mandatory
- Install Base (IB) Manager/Coordinator – Mandatory

Business Resource/Service Footprint

- Number of Service Centers in your Region – Mandatory
- Ability to be at sites in 24 hours- Mandatory

Training Manager ⓘ Mr Best in Class	Training Manager Email
Install Base Manager Mr Knows Exact Location and Op Hours	Install Base Manager Email
Business Resources	
Equipment Sales Resources ⓘ	
Equipment Application Engineering ⓘ	Field Technicians ⓘ
Service Sales Resources ⓘ	24/7 hotline & troubleshooting
Svc Application Engineering ⓘ	How is service hotline executed?
Field Svc Support ⓘ	Number of Service Centers in your region ⓘ 12
Other resources ⓘ	Ability to be at sites within 24 hours ⓘ 50%

Business Information & Resources cont.

The “Business Information & Resources” section allows for a better understanding of your organization setup

1. Please provide information on your planned total business revenue and the revenue with the Waukesha product line for the current year.
2. Consent to share financial statements as described in the SFDC Community. Note: This is required by INNIO for credit evaluation purposes and can lead to more favorable credit and payment terms.
3. Upload the following documents in the “Related tab”:
 1. Organization Chart as described in SFDC Community
 2. Financial statements as described in SFDC Community (if not already provided to Waukesha earlier this year)

Your total business revenue ⓘ

Revenue with Waukesha products

Consent: Financial information

Yes: With the upload of these documents, I herewith consent to INNIO sharing the financial information with the following institu..

Section “Related”

The “Related” tab has five sections that require your input

1. Deal Pipeline and Customers
2. Technical Certification - Mandatory
3. Communication Plan
4. INNIO Performance
5. Notes & Attachments

The screenshot displays the 'RELATED' tab in a software interface. The tab is highlighted in blue. Below the tab, there are five sections, each with a light green background and a 'New' or 'Upload Files' button:

- Deal Pipeline and Customers (0)**: Includes a wrench icon and a 'New' button.
- Technical Certification (0)**: Includes a gear icon and a 'New' button.
- Communication Plan (0)**: Includes a gear icon and a 'New' button.
- INNIO Performances (0)**: Includes a gear icon and a 'New' button.
- Notes & Attachments (0)**: Includes a document icon and an 'Upload Files' button.

Below the 'Notes & Attachments' section, there is a dashed border area containing an 'Upload Files' button and the text 'Or drop files'.

Deal Pipeline and Customers

Information to understand upcoming deals that are mainly supporting your AP commitments

1. Click on “New” and choose “INNIO Deal Pipeline and Customers”
2. Provide the information accordingly
3. For each additional entry, click “Save & New” or go back to step 1

New Top Customer: INNIO Deal Pipeline and Customers

Note:
What is the deal pipeline and the customers driving your Account Plan commitments?

Information

* Account Plan ⓘ <input type="text" value="TEST 2021"/>	Vertical Industry ⓘ <input type="text" value="PG: Oil & Gas other"/>
* Customer Name <input type="text" value="TBD - CUSTOMER NAME"/>	* Target Order Value ⓘ <input type="text" value="750,000.000"/>
Customer Type <input type="text" value="New Targeted Customer"/>	Probability of Winning <input type="text" value="High"/>
Customer Relation ⓘ <input type="text" value="Medium"/>	Product type <input type="text" value="--None--"/>
	Number of units <input type="text"/>
	Currency <input type="text" value="USD - U.S. Dollar"/>

Technical Certification - Mandatory

Technical certification shows the current and target Field Technician certification commitments

1. The certification targets for next year are discussed between the Waukesha Product Training Center (PTC) and your internal training coordinator.
2. The agreed targets in this discussion are populated by the Waukesha PTC with the respective contact names and the date of the discussion.
3. Do not edit these targets before prior alignment with your channel champion and the PTC training contact.
4. The new overview provides the current number of certified technicians per level in the left column, and the target number per level in the right column.

New Technical Training: Waukesha Technical Training

Fill out Requirements only for the Products that are within your Contract scope

Technical Training Name

Currency

* Account Plan

Waukesha

Certified VGF Technician ¹	<input type="text" value="1"/>	Technicians to be trained on VGF ¹	<input type="text" value="3"/>
Certified VHP Technician ¹	<input type="text" value="2"/>	Technicians to be trained on VHP ¹	<input type="text" value="3"/>
Certified 275 GL+ Technician ¹	<input type="text" value="1"/>	Technicians to be trained on 275 GL+ ¹	<input type="text" value="3"/>
Other Training	<input type="text" value="if applicable - free form text"/>	Number of People to be Trained ¹	<input type="text"/>
Other Training	<input type="text"/>	Number of People to be Trained ¹	<input type="text"/>
Other Training	<input type="text"/>	Number of People to be Trained ¹	<input type="text"/>

Communication Plan

This information helps us to facilitate collaboration on any communication activities

1. Click on “New”, Choose Waukesha and provide the information accordingly
2. For each additional entry, click “Save & New” or go back to step 1.

New Communication Plan

Information

* Account Plan

* Vertical Industry

* Activity type

Location

* Do you need support from INNIO?

* Activity Name

* Dates

Purpose and action during this activity?

What support you need from INNIO?

Waukesha Performance

In order to further improve how Waukesha is enabling you in the market, please provide us your feedback

1. Click on “New” and choose “Waukesha Performance”
2. Provide a score (10 is highest, 1 is lowest) and kindly provide a comment for each category
3. Let us know how we can better enable you to deliver to your customers

New INNIO Performance: Waukesha Performance

Note: 10 being the Highest

* Product Performance	Product Performance Comment
10	PLEASE PROVIDE FEEDBACK, COMMENTS
* Commercial Responsiveness	Commercial Responsiveness Comment
--None--	
* Project Execution	Project Execution Comment
--None--	
* New Units Order Satisfaction	New Unit Order Satisfaction Comment
--None--	
* Service Product Order Satisfaction	Service prod order Satisfaction Comment
--None--	
* Technical Issue Resolution.Cycle Time	Technical Issue.RCT.Comment

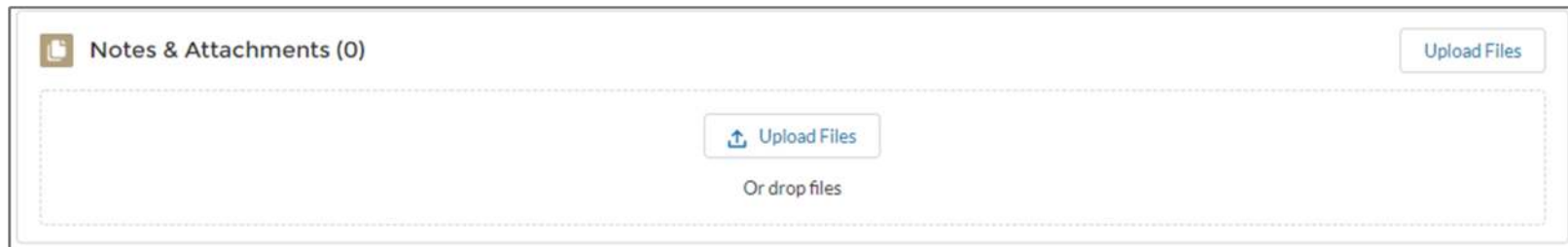
Cancel Save & New Save



Notes & Attachments

Upload the requested documents here

1. Click on “Upload files” and choose the files you wish to upload
2. As mentioned previously, the required files are:
 1. An organizational chart of your organization setup for the Waukesha product line
 2. The financial statements as described in the SFDC Community



The screenshot shows a user interface for 'Notes & Attachments (0)'. In the top right corner, there is a button labeled 'Upload Files'. The main area is a large dashed-line box containing a smaller button labeled 'Upload Files' with an upward arrow icon, and the text 'Or drop files' below it.

Training on demand is available via MS Teams meeting

For training or in case of technical issues regarding the SFDC Account Plans, please reach out to your Channel Champion or

Max Liberman

Channel Manager

Max.Liberman@innio.com

Questions
Answers

Waukesha

INNIO