7 Steps to CX Specialization

As the CX Specialization journey becomes a mandatory element for all of our Gold Certified partners by 7th January 2022 (**Announcement Link**) , see a guidance page to assist you on the most important resources and steps towards the first level of CX Specialization.

To build a Customer Success Practice and prepare for submitting the application for **becoming CX Specialized** you need to invest and describe 3 major areas : **People, Processes & Tools** , and how these serve the target of engaging with the customer to drive value through a well described **Customer Success Methodology.** For all the below steps review also the **Customer Success e-Book** as a good starting document that puts a structure around the concept and **Customer Success for Beginners recording and deck.**

Step 1: Identify and capture all available resources and content to help you understand what is needed to become certified:

- **Specialization Portal (Central Portal with all info on the program)**
- **Requirements Document (Short document with links on what is needed)**
- **People Roles & Training (Trainings on requested people roles)**
- **Recordings (Recording & Presentation with info on Specialization) and Step by Step Guide**
- **Customer Success e-Book (very detailed doc the describes all aspects of a Customer Success Practice)**
- **Job Role Guidance on SW Transformation**

Understand what the application asks:

Prepare your content and get a good idea on what is needed to be submitted in the application. Content can be in the form of text description, power point presentations, word documents, flow charts, pdfs etc that describe your company processes, present your practice, explain your measurement techniques and tool usage, describe your different Lifecycle stages and activities. Download the Application Customer Success questionnaire below so you can answer the questions, and prepare to gather any additional content:

- **Application Customer Success Questionnaire (look under resources)**

Some of the most important documents that need to be attached are:

- Organizational Chart that shows where the CS team reports to and how the company is structured
- Lifecycle Methodology User Guide & description (includes Lifecycle Journey w/ Stages, Activities per stage, RACI model)
- Customer Success Methodology description (CS Plan Template included)
- Document describing the KPIs and how you measure Customer Success internally and at customer level
- Information for the people that will manage and execute Customer Success - experience, trainings, profile and skills
- RACI Model

Step 2: Have a Strategy Meeting

Appoint an Executive Sponsor - The Exec Sponsor needs to gather all leaders of the major functions of the company (Sales, Support, Prof Services, Renewal Lead) and discuss how the new function will operate inside the company. Who will manage the new team, budget related elements, how this function will connect in terms of process with the other functions how will be measured and appoint a Practice Leader and/or a Project Manager to drive the concept in the company and manage the Specialization steps

Step 3: Identify the People (4 distinct individuals)

- Executive Sponsor: Sponsor needs to have the authority to approve budget, make decisions, appoint a Practice Leader (optional in first level of Specialization) or appoint an owner to manage the Specialization journey.
- Choose the 2 x Customer Success Managers: CVs that describe adoption knowledge, have them go through the training Free (Foundation, Advanced) and for Fee (E-Learning or 3 Day VILT Class) and pass the CSM exam. For CSM that have no experience the 3 Day VILT Class is recommended after they have finished the free training curriculum.
- Choose the 1 x Renewal Manager, take the free on-line training, and pass the RM exam
- None of the above roles can be utilized on any other Cisco specializations and need to be 100% dedicated to the role.

Training Resources

- **People Roles & Training,**
- Renewal Manager - 1 person: **Preparation Content** , **RM Exam**
- **Customer Success Manager** - 2 People: **Recommended to take all sequence of training : Foundation (Free)**, **Advanced (Free)**, **3-Day VILT Class or E-Learning**, **CSM Exam** and **Exam Topics**
- Note: Above trainings are not mandatory to pass the Exam and become certified but are strongly recommended so people get the relevant knowledge they need for the role and the exam.
- Optional : not needed for the CX Specialization but a good recommendation for supporting the practice is the free **Customer Success Specialist (CSS) - Foundation Role Training** if partners need to build the role

Step 4: Build & Describe your Lifecycle Methodology (Process)

The Owner needs to manage the creation of the **Lifecycle Methodology User Guide** (one document describing the major Lifecycle Stages from Sell to Renew and which activities are performed in each stage as you drive the customer through the Lifecycle). Partners can replicate the 14 step Racetrack from Cisco if they want or create their own Lifecycle Stages aligned to the model and describe what they do in each stage and which role is engaged in each activity and stage (in reality they need to define their **RACI model** , including the new function of the Customer Success team roles).

As a good guidance the Lifecycle Methodology Document should describe as a minimum:

- **Sales Methodology**
- **Implementation Methodology**
- **Customer Success/Adoption Methodology**
- **Renewal Management Methodology**
- **RACI model for all stages - Who is doing what**

mentioning all the Lifecycle Stages that the customer goes through and the main activities performed in each stage.

Most partners have already the 3 areas and they need to create the **Customer Success** one and connect it as a process end to end with the other three, reorganizing and optimizing some additional elements and adding **hand off process** documents.

Special focus needs to be given in describing the activities and steps in the **Customer Success/Adoption** stages/stage of the Lifecycle Methodology. Here the description of the **Customer Success Methodology** is crucial to show how the partner extracts value for the customer following specific steps in the customer engagement process. One very important document that needs to be created in Customer Success, is the **Customer Success Plan.** Partners needs to create a **Customer Success Plan Template** to capture the activities, the findings and the results of the Adoption process with the customer. This document is the execution document the CSMs use to engage, agree and execute the business outcomes with the customer, defining the KPIs and the tasks they need to work with the customer. This is the document you need to upload to the PPE tool once you become Specialized in order to earn you Lifecycle Adopt Incentives.

See relevant recording with explanation and examples on some of these areas: **Recording**

Step 5: Build & Describe your Tools

One of the most important areas of a good practice is how you measure and track results. Here you need to build or use existing tools in order to measure your practice and specifically Customer Success.

Which metrics do you use to define you KPI baselines, which tools and which reports in order to be able to track progress you need to describe them in your application. It could be Cisco existing tools like CCW/R and LCA platform to capture and automate activities for the renewal practice (T-x trigger points on your renewals for example) , it could be you CRM that captures pipeline and sales opportunities.

But the most important is you need a tool to **measure and capture progress on Customer Success**. It can be a sophisticated Excel file where you capture manually health scores and indicators that you will define, it can a module on your CRM that you have customized or it can be an **off the shelf tool you bought from the market**.

Whatever it is, you need to describe the tool/s that you use , what it captures and how it helps you understand the customer status in order to initiate activities that will drive results on adoption.

Partners often utilize and reference in their application a combination of Cisco and partner tools. From Cisco for example: CCW/R for renewal management and ordering, Lifecycle Advantage Platform for renewal automation and digital adoption journeys, TPV for managing renewal opportunities etc. From Partner side examples are: CRM and CRM modules customized to deliver a specific function, service ticketing systems, renewal management pipeline tools/excels, workflow tools. Also, some internal tools integrated with API functionalities with Cisco tools that increase automation and efficiency.

Regardless of the tool choice, the application reviewer looks to see and understand how these tools **are connected in a good flow with the overall Lifecycle journey** and how they serve the purpose to support the business outcome journey. Special focus is given on the **Customer Success tool** and how you **measure Customer Success** as part of the practice.

See below two tables with requirements and guidance on what the Customer Success tool need to capture as a minimum.

CS Tool Requirement definitions and guidance

FEATURE	DESCRIPTION	WHAT IS EXPECTED
Playbooks	Engage customers throughout the lifecycle	A document with Customer´s journey definition, with the different engagement stages or interactions explained with key actions and expected outcomes or tasks executed.
Customer Profiles	Build or identify customer profiles	Complete customer profile with key data points: Name, address, industry, number of employees, number of devices, fiscal year; Defined segmentation: Type A, B or C customer
Customer Monitoring	Capture customer data, history, and feedback including survey results, invoice history, marketing engagement, and/or team interactions	Track record of interactions and engagements: sales, service, marketing, advocate / recommend. Telemetry and Analytics, business intelligence and success scores
Upsell Opportunities and Churn Risk (required for Advanced)	Predict future customer growth or red flags based on data related to interactions, payments, inquiries, renewals and more	Account plan, success plan, Forecast opportunities, renewal visibility, transactional and subscription business. Business intelligence and Insights and analytics
Custom Triggers (required for Advanced)	Configurable alerts and notification: Low Score Survey, Time exceeded to response / deliver, past due task (e.g. invoicing), slow adoption	Configurable set of key alerts to manage corrective actions, escalations or damage control
Product Engagement and scalability	Rate of active users/products vs total available licenses/devices (adoption or activation %)	Tracking of products sold vs product effectively used / installed. It could be by department / by technology solution, by geography or by specific project. Scalable and adaptable depending on the size of end user customers
Customer Health Scores (required for Advanced)	Provide feedback and customer success scores based on the analysis of historical data	Combined view/metric that includes: Product utilization, product quality, customer sentiment and customer sales and contract financials

<u>Tool requirements by level</u>

Process	Specialized	Advanced
Customer Profile	Can be manual	Complete customer profile with key data points: Name, address, industry, number of employees, number of devices, fiscal year; Defined segmentation: Type A, B or C customer
Playbook	Documented and communicated to all customer facing orgs. Can be manual	Documented and communicated to all customer facing orgs. Should have an automation plan
Utilization	Manual Telemetry	Cloud telemetry where available; Basic telemetry from licensing data or software collector, or manual telemetry where automation is not possible*
Customer Success`	Can be manual	Automated traffic dashboard, with adoption tracking, and barrier identification
Renewals Management	Track renewals – can be manual or use Cisco Lifecycle Advantage	Automation for renewal process; Ideal can include auto renewal for under $5K
Derive Business Intelligence	Not Required	Automated collation of various inputs to give customer health scores and automated Calls-to-Action
Optimization	Not Required	Automation of the renewal process

Step 6: Describe two customer references

In the two customer references that you need to submit in your application, you need to describe the process you followed to engage with the customer utilizing you Lifecycle Methodology, and describing how you executed the Customer Success Plan capturing information like : Steps of Execution, Business Outcomes agreed with the customer, Stakeholders that were involved and how, Solution Sold and expectations from the customer, KPIs to measure baseline and achieved outcomes, measurement techniques and reports on how you achieved the results. It is not the actual Customer Success Plan but rather a detailed description on what you did and how, executing the Customer Success Plan.

See: **Customer Reference Form** (**look under resources**)

Step 7: Apply for your CX Specialization

Upload all documentation and answers to the application questions to the PMA tool as per **Step by Step process document** (PMA application document) Once you become certified start executing and earn rewards and Lifecycle incentives through the program. Appoint specific accounts to your CSMs, apply your CS practice design (CS Plan, Metrics/KPIs, Adoption Steps) and get feedback from your CSMs to optimize the process.