



Partner Journey

Lifecycle Model & Steps to CX Specialization

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Agenda

Part II

- Lifecycle Methodology Elements
- Customer Success Methodology Elements
- Examples on How we measure Customer Success
- CS Tools
- 7 Steps to CX Specialization
- Summary and CTA

Customer Lifecycle Practice

Customer Input
Pain Points

Lifecycle & Customer Success Plan Execution based on Use Cases
New Business Capability

Customer Technical &
Business Outcome
Achievement

↑
CX Lifecycle Specializations
Specialized-Adv. Specialized
People, Process, Tools, Methodology

Customer Lifecycle Practice

Customer Success Practice
How we engage to extract value

↑
Software Lifecycle Practice

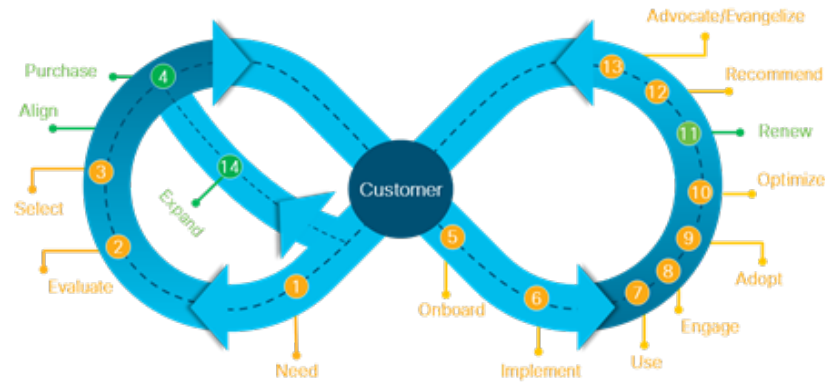
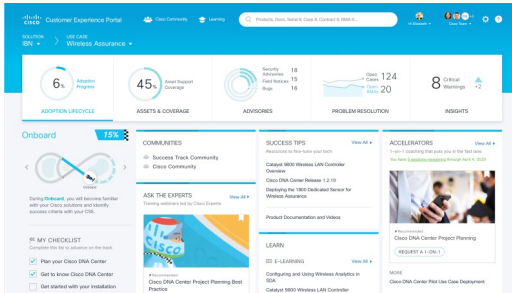
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HW & IB Man. Lifecycle Practice

Partner Transformation Framework

	Drive to Sell	Drive To Implement	Drive to Adopt	Drive to Expand/Renew
Ownership Execution	Define Owner/s	Define Owner/s	Define Owner/s	Define Owner/s
Customer Lifecycle	Lifecycle Methodology (Stages, Activities, RACI Model, Metrics, Info capturing)			
	SW Lifecycle Practice (Includes Digital Strategy)			
	HW/IOS Lifecycle Practice (IB Management Practice , Collector, Reports)			
Major Cross Functional Initiatives	Use Cases (Position, Implement, Adopt, Create Libraries)			
	EAs (Position, Manage, Implement & Adopt on a Use Case Level , Renew/Expand)			
	Lifecycle Portfolio (CX Portfolio, Partner Monetized Services, etc)			
	Devnet & Managed Services			
	Observability Stack (AppD, ThousandEyes, Intersight)			

Lifecycle Methodology

Customer experience is a perception of value; how our customers perceive the value of Cisco products, services and support throughout the lifecycle.



In the new CX Portfolio through the CX Portal telemetry and the ATX/Accelerators we deliver both HW&SW Lifecycle elements

The CSM should be able to deliver both Hardware & Software Lifecycle engagement as part of the CS Plan execution

Lifecycle Methodology – Requirements on Lifecycle Specializations for Partners



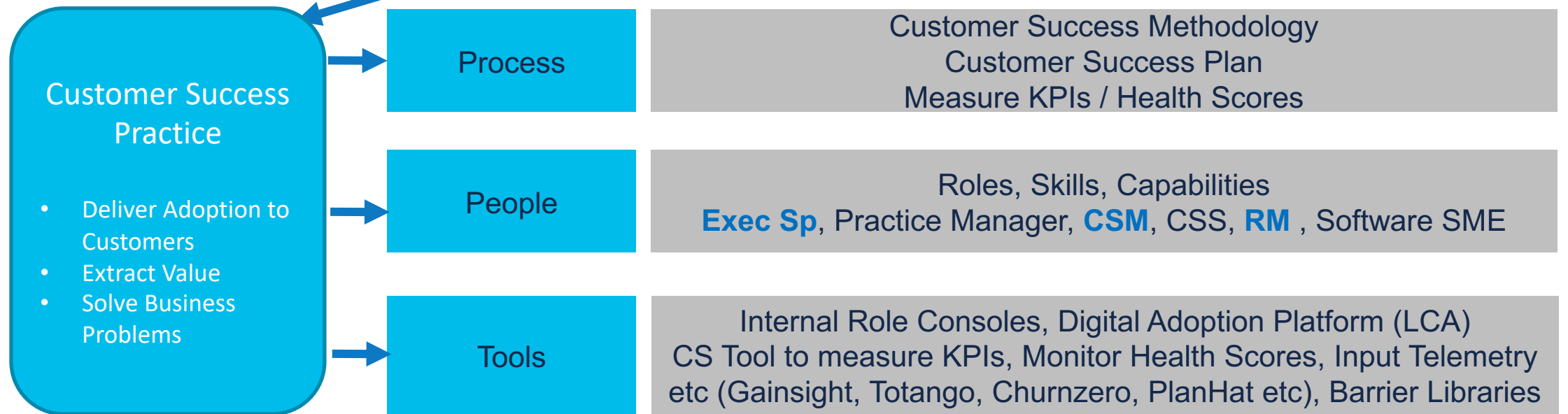
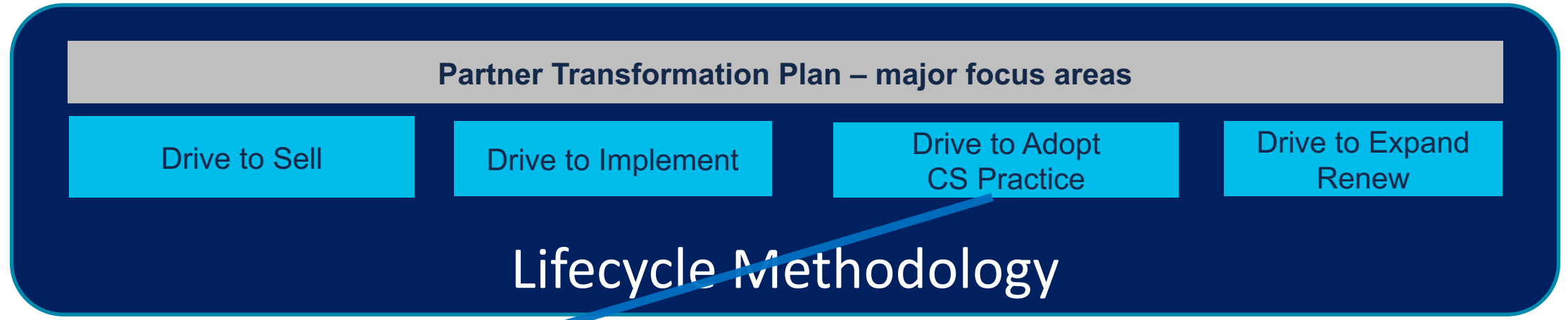
Lifecycle Methodology – Basic Elements



Includes as a minimum:

- Lifecycle Stages & Lifecycle Activities/Deliverables in each stage
- Hand Off Processes between functions – between roles
- Tools to be used in each stage & input data from Vendor Tools
- Ownership – RACI model per stage
- Practices for : Sell the Use Case vs BO, Implement the Use Case (Exit Criteria) , Deliver CS per Use Case (ATX/Acc, I &A, etc), Renew the technology
- Roles (Software Sales, Practice Leader, CSMs, CSS. RM, Ren Specialist)

Deeper in Customer Success



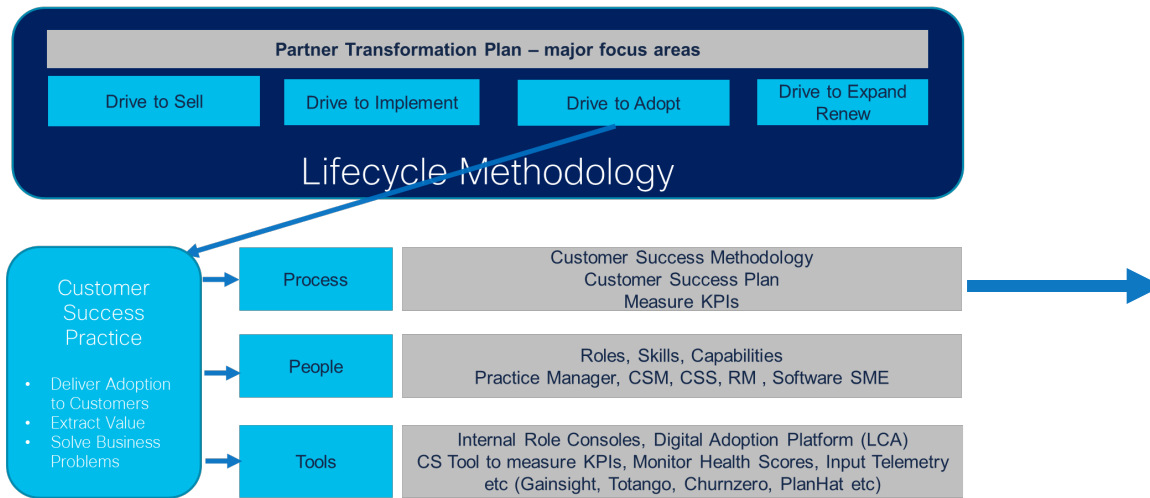
Example RACI Model

				ROLES								
	MARKET MODEL	CISCO MODEL	PARTNER	AM	ARCHITECT	ENGINEER	DELIVERY	PROJECT MANAGER	CSM	CSS	RM	
1	LAND	NEED	STAGE 1	A	R			I	C	C	I	
2		EVALUATE		A	R	R		I	C	C	C	
3		SELECT										
4		PURCHASE		R/A	I	I				I	I	I
5	ADOPT	IMPLEMENT	STAGE 2	A	I	R	R		C	C		
6		ONBOARD		A	C	I	A		R	R		
7		USE	STAGE 3	A	C	I	C	I	R	R		
8		ENGAGE		A	C	C	C	I	R	R		
9		ADOPT	STAGE 4	A	C	C	C	I	R	R		
10		OPTIMIZE		A	C	R	C	I	R	R		
11	RENEW	RENEW	STAGE 5	A	I			I	C	C	R	
12		RECOMMENDED		A	C	C		I	R	R	C	
13		ADVOCATE										
14	EXPAND	EXPAND		A	R	I		I	C	C	R	

******* Partner to either replicate the Cisco Model or best to define its own Lifecycle Stages aligned to the Cisco Model. The number of stages is dependable to the partner structure and internal business processes, roles and responsibilities.**

Deeper in Customer Success Methodology

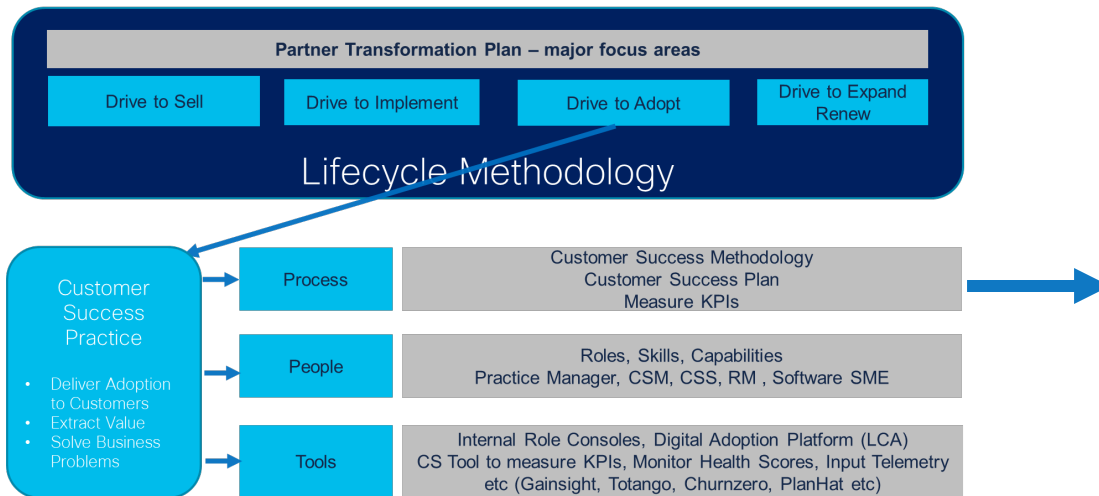
Deeper in Customer Success



- User Guide describing the key steps of the methodology and what is targeted in each step - execution points & CTAs (the guide is used to achieve consistency and to onboard new members in the team).
- Discovery Session highlights (internal-external) and possible sample questionnaire.
- Stakeholder Management - Use Case - Persona Identification steps and activities
- **Business Outcome** Identification on a Use Case level
- **KPIs - Utilization - Measurements**
- Change Management activities - Adoption Barrier relief
- Communication (on change management and adoption activities)
- **Templates and Supporting Material for engagement (CS Plan template, Stakeholder management template, communication template, adoption activity template)**
- Adoption Journeys per technology (CSM/CSS scope) connected with business outcomes and proposed KPIs

Deeper in Customer Success Plan

Deeper in Customer Success



TIP: on Customer Success Plan & Reference

- **Follow : Business Outcome -> Initiative/s -> KPIs for each initiative**

A customer success plan should:

- **collate all major aspects of the adoption journey** in alignment with the **customer requirements**. **Target outcomes: activate – use – upsell the solution**
- Purpose: **to connect the technology with Business Outcomes** and resolve **customer pain points** – usually executed on a **Use Case level** for specific **personas**
- It is a dynamic document that can be altered as the CSM engages with the customer

As a minimum a CS Plan should capture:

- Products & Solution sold
- Business Outcomes
- Stakeholder mapping
- KPIs (initial state, target state, how to measure) follow the SMART criteria
- Use Case & Persona identification
- Adoption Barriers
- Adoption plan and strategy to accomplish the customer's business outcome
- Business Process integration – change management steps
- Communication & Training activities & Timelines
- Measurement – results (Business Outcomes, KPIs, activities, success story)

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CSE Success Plan

To be filled with Sales and CX team and validated with customer

Delivering expected value and unexpected value from purchases

<p>Key Questions</p> <ol style="list-style-type: none"> 1. What key products/solutions has my customer bought in the last 5 years and how are they doing? 2. Where does value lie? What areas do I prioritize within my account's portfolio? 3. For my priority areas, what actions(outputs) do I need to take and what resources do I have for support? 	<p>Source of insight</p> <ul style="list-style-type: none"> Account Baseline Data Health score and Priorities Data Success Plan Summary Actions (formed jointly w/ account team), CSE Playbook (Playcards, Tools, RACI)
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At solution level -- gather from sales team

Customer Success Priorities	Products/solutions covered	Customer Journey Stage	Barrier to Success	Actions	Metric for success	Timeline for completion	Status	Support resources / teams
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								

Success Plan Status	Check all that apply	Date
Initiated Plan	<input type="checkbox"/> Yes	
Aligned with Sales	<input type="checkbox"/> Yes	
Agreement with Customer	<input type="checkbox"/> Yes	
Last Updated	<input type="checkbox"/> Yes	
QSR delivered	<input type="checkbox"/> Yes	

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1 2 3 A B C D E F G H I J K L

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Suite Purchased can be found on Usage Healthscore Tableau
 Manual Collection can be captured from CX and Sales
 Usage Healthscore Automated can be found on Usage Healthscore Tableau

Baseline Details

Enterprise Agreements	Architecture	Suit(s)	Suites Purchased
	Collaboration EA		<input type="checkbox"/> Yes
	Security EA		<input type="checkbox"/> Yes
	Cisco One EA		<input type="checkbox"/> Yes

Networking -

Customer Success Priorities	Architecture	Solution	Suites Purchased	Manual Collection			Usage Healthscore Automated data			
			Purchased	Is the Product Deployed?	Is the Product in Production?	Is the Customer actively using the product?	Health Score	Implement/Use	Engage	Adopt
		DNA-Center	<input type="checkbox"/> Yes	No	No	No				
		Advanced mobility	<input type="checkbox"/> Yes							
		SD-WAN	<input type="checkbox"/> Yes							
		ISE	<input type="checkbox"/> Yes							
		Meraki	<input type="checkbox"/> Yes							

Data Center -

Customer Success Priorities	Architecture	Solution	Suites Purchased	Manual Collection			Usage Healthscore Automated data			
			Purchased	Is the Product Deployed?	Is the Product in Production?	Is the Customer actively using the product?	Health Score	Implement/Use	Engage	Adopt
		NXOS-ACI	<input type="checkbox"/> Yes							
		HyperFlex	<input type="checkbox"/> Yes							
		ECS-Big Data	<input type="checkbox"/> Yes							
		ECS-Cloud Mgmt.	<input type="checkbox"/> Yes							
		ECS-IAAC	<input type="checkbox"/> Yes							
		APP-D	<input type="checkbox"/> Yes							
		Tetration	<input type="checkbox"/> Yes							
		Meraki	<input type="checkbox"/> Yes							

Do we need to measure Customer Success and how ?

- One of the main objectives in a good Customer Success Practice but most importantly in a Customer Lifecycle Practice is how we measure that the engagement model is successful
- What do we consider success – how do we know that the business is returning the investment

We need to define metrics that measure :

- The **Business** : Profitability, Support, Software, Automation, Adoption (Exec Dashboard)
- The **Team** : Adopt , Expand, Success Stories, iARR, ACV, SW RR, RSW RR, New Adoption Services Positioning . CS Plan Submission & Execution
- The **Customer**: License and Feature Usage, Subjective-Objective Adoption, Health Score Creation

Exec Dashboard –
Business Monitoring



Measuring Services & Renewals performance. Understanding how, and how early, they engage on opportunities and how well they position services across their customers' networks.

Measuring Software performance and potential. Understanding how they support SW, SW renewals opportunities, their practice in place to scale to the low-dollar and how well they are positioning EAs/BPs.

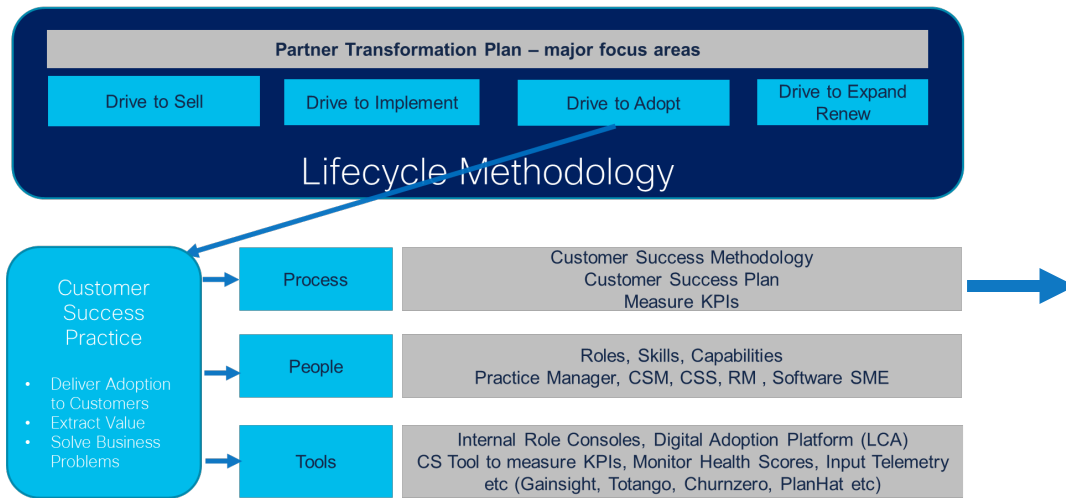
Measuring their utilization of Cisco's digital integration capabilities across programs like Lifecycle Advantage, Auto-quotes or API connectivity into their own platforms to drive low/no touch repeatable processes.

Measuring a partner's ability to earn and leverage Cisco's key profitability programs like CSPP, VIP Annuity and Lifecycle Incentives to drive success and investment into Renewals and SW practices.

Measuring CX and Adoption practices. Understanding their commitment to create value across their customers - leveraging CE Specialization, buying programs, incentives and CX-IB methodologies.

Deeper in Health Scores

Deeper in Customer Success



- A Customer Health Score is simply a proxy for predicting future customer behavior.
- Health Scores are used to drive actions. At a simple level, low scores drive intervention to remedy the challenges and high scores drive Sales or Marketing actions to generate references, case studies, and expand opportunities.
- When our health scores mature to the point of being very predictive, which they will, these interventions will be highly relevant and effective.

Health Scores are built on objective and subjective inputs

- ❖ **Objective Inputs** – Part of the analytics associated to an offer. Specific measurements are used to build the objective inputs. Objective Inputs are a percentage of a Health Score
- ❖ **Subjective Inputs** – Based on observations or specific actions that influence the customer behaviors. Subjective Inputs are a percentage of a Health Score. The Subjective Input questions the are used to calculate the Subjective score for all offers are:

- Use the same analogy on all offers 80/20 , 70/30 etc for all health scores
- Use the same scale for Objective HS (ex : 1-10)
- Build/Invest in a tool to maintain measurement and monitor results
- Use the tool to target and measure Customer Success Managers
- Utilize Telemetry tools if needed to identify the measurement parameters

Scorecard Fields	Yes or Complete	In Progress, not complete	No	Weight to Overall Health Score
Stakeholders Identified	10	5	1	2%
Business Objective	10	5	1	2%
Key Features Aligned	10	5	1	2%
Persona Use Cases Aligned	10	5	1	2%
Business Objective KPIs	10	5	1	2%
KPI measured	10	5	1	2%
KPIs Reported to Exec	10	5	1	2%
Adoption Barriers Resolved	10	5	1	2%
Embedded Product Capabilities	10	5	1	2%
Prior Product Removed	10	5	1	2%
Total				20%

← Subjective Health Score

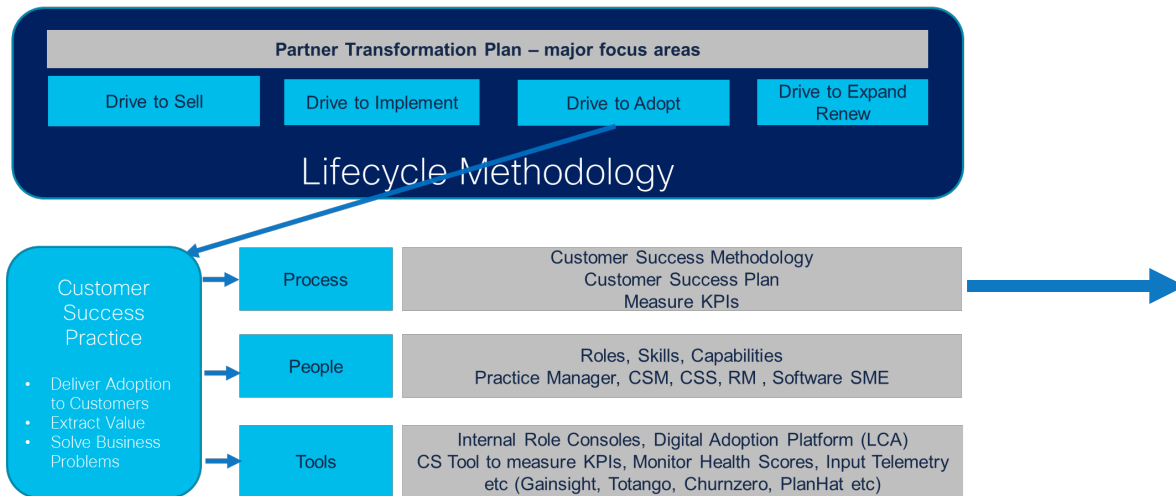
Example of how to build a Subjective HS & Objective Health Score

1-10 Point Scoring						
(NOTE: Customer must have at least one of the following four suite IDs (UC Suite) to have objective scores - 20005,32005,50005,61005)						
CuCM/KW Ratio (Take the highest CuCM user license total for a particular version - 8, 9, 10 or 11)	No licenses Downloaded	Greater than 0 Less than or equal to 40%	Greater than 40% less than 89%	90% or greater		Weight
Score	1	3	7	10		25%
CUCM Current Version Compliance	Look at User Licenses for Version 10 & 11: a. Sum of (UCM-10X-EA-PRO + UPG-ELA-UCM9TO10-PRO) for version 10 b. Sum of (UCM-11X-EA-PRO + UPG-ELA-UCM9TO11-PRO + UPG-ELA-UCM10TO11-PRO) for version 11 If quantity of both a. and b. individually is less than 50% of the KW count, or customer does not have these SKUs The 4 Suites that have the following: 20005, 50005, 61005, 32005	Look at User Licenses for Version 10 & 11: a. Sum of (UCM-10X-EA-PRO + UPG-ELA-UCM9TO10-PRO) for version 10 b. Sum of (UCM-11X-EA-PRO + UPG-ELA-UCM9TO11-PRO + UPG-ELA-UCM10TO11-PRO) for version 11 If quantity of either of the two a. or b. individually is greater than 50% of the KW count The 4 Suites that have the following: 20005, 50005, 61005, 32005				
Score	1	10				20%
Feature Activation – UC Suite	0 or 1	2 or 3	4 or 5	6	7 or greater	
Score	1	4	6	8	10	35%
Value Index						
Score	Based on the sum of the individual value index scores – max score of 10					20%
Total Available						100%

← Objective Health Score

Hand Off Processes

Deeper in Customer Success



A **Hand Off process** is a process that describes important elements of information and tasks that a functional group acts upon when **they pass a project or an activity** to another functional group.

A Hand Off process can be:

Generic that describes the holistic list of actions **between groups** (for examples Sales to Customer Success), usually in the context of a Lifecycle stage progression (ex. from implement to use stage etc)

or

Can be specific to a task or action (a lot of times initiated by triggers) that describes the activity from an individual to an individual in the **same group or another functional group** (ex. CSM to CSS in the CS group, or CSS to Delivery Engineer in different groups) – usually comes as a result for an adoption barrier resolution or specific activities as part of the execution of the Customer Success Plan

Example Sales/Customer Success Transfer Process Onboard

Objective

Align Sales and CX to initiate the customer success motion
Align on customer, solution, contract details and desired business outcomes

Customer audience

Business Decision Makers;
IT Decision Maker; IT Admins; Technical leads

Roles

- **Responsible:** AM
- **Accountable:** AM, CSM
- **Consulted:** N/A
- **Informed:** SM, CSS, ...

Execution plan

- 1 **Account team** gathers information in preparation for kickoff with **Customer Success team**.
Examples include:
 - Contract data with Scope Of Work and initial Customer Success Plan
 - Account team and customer stakeholder names and contact details
 - Customer expectation details with predefined business outcome during pre-sales
- 2 **Account team** notifies of new sale and reviews what was purchased
 - **CSM** updates/reviews business goals, success criteria, and priorities for the customer, including any special customer requirements
 - Update stakeholder map
 - Provide KPIs to measure business outcome
 - Update relevant sales pipeline and competitive threats/presence
- 3 **CSM reviews** roles and responsibilities of the **CX team** with the **sales team**
- 4 **Sales team/AM** introduces **Customer Success Manager** to key **customer** and **partner** stakeholders

Next steps

- CSM starts preparing for kick-off and draft templates of the success plan

Trigger/prerequisite

Within X weeks after deal close

Scope

Current solution purchased, including professional services SOW(s) and Customer Success Plan with initial business outcomes identified

Key resources

- Sales/services contract/agreement and updated account plan
- Customer stakeholder map
- Customer expectation details
- Any other documents used by sales during pre-sales

Success criteria

- Clear understanding of solutions/services sold
- Alignment on customer definition of expected value
- Clear identification of stakeholders, roles/responsibilities between **teams**
- Customer clarity on point of contact

Example CSM/CSS/Technical Lead Transfer Process Adoption

Objective

Increase adoption of existing product use cases and features that are underutilized

Customer audience

Product purchaser (depends on product), lead users

Roles

- **Responsible:** CSM
- **Accountable:** CSM
- **Consulted:** AM, ...
- **Informed:** Execs, ...

Execution plan

- 1 Review Customer Success plan metrics and KPIs
- 2 Identify use cases and features that are underutilized
- 3 Complete adoption barrier analysis
 - **CSM** reviews telemetry data and finds adoption barriers, engages CSS
 - **CSS** determines key inhibitors that are slowing down or preventing adoption
 - **CSM & SM** identify whether adoption barrier is business or technical and orchestrate the right resources/personnel to address them
 - Technical barrier – engage resources to address the barrier (CSS or other technical resources)
 - Business barrier – work with **Customer** and **Sales** to resolve barrier and document for best practices
- 4 For technical barriers, **CSS/Technical Resource** proposes resolution to key customer stakeholder
- 5 **CSM** manages execution of adoption barrier resolution – communicate progress throughout execution

Next steps

- **CSM** measures and communicates resolution of adoption barrier to **customer**
- **CSM** continues to monitor telemetry for ongoing adoption

Trigger/prerequisite

Adoption reporting reveals key adoption barrier and/or product telemetry shows lack of feature adoption

Scope

All products which have not been fully adopted as per adoption plan and/or success plan

Key resources

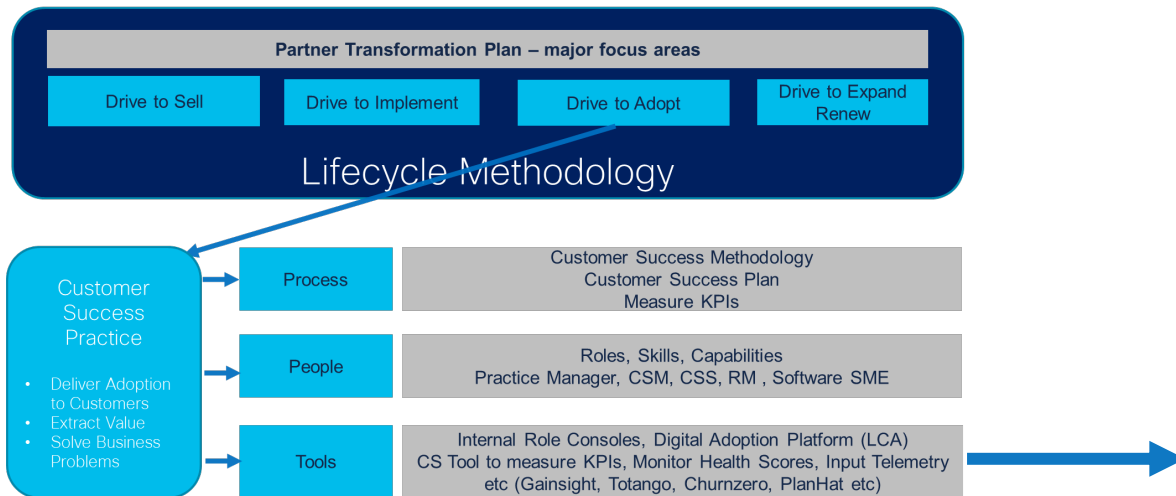
- Telemetry
- Customer Success Plan metrics and KPIs
- Adoption Barrier Analysis

Success criteria

- Adoption barrier resolution executed, and product adoption brought back on or ahead of schedule
- Customer has achieved expected value of solution
- Customer usage of target products increases significantly

Internal Role Consoles

Deeper in Customer Success



A Lifecycle Methodology execution depends a lot on the support tools provide to people.

We have internal tools (through the Lifecycle engagement) that help the various roles to engage and execute their tasks faster and more efficient and external tools that could interact with the customer (portals, report generation on line for telemetry, triggers to customer, digital updates or risk notifications).

Some of the internal most important tool consoles

Examples

- AM Console : ex CRM views
- Delivery Manager Consoles : module on CRM
- CSM console : Dedicated tool or CRM module
- CSS console : Dedicated tool or CRM module
- RM Console : Dedicated tool or CRM module

Customer Success Tool Vendors :

Gainsight , Totango, Planhat, Churnzero etc

Guidelines on monetization

Create bundles of Premium and Enhanced Services on Customer Success under the category of Annuity Services

Distinguish between Basic **for Free** Customer Success services included in the Subscription fee or the offered software solution and Enhanced/Premium Customer Success Services **for a Fee**

Industry is still mainly on the free mode on Customer Success support model and moving fast to chargeable services.

The packages **could** include a combination of **Support & Adoption Services** in one package so the customer perceives a value stack that can differentiate you from competition (see Cisco example)

You can also follow similar logic on your Managed Services packages by bundling Support and Adoption Services in the Managed Services Package (Fee based Managed Services bundle)

Create a Service Catalogue on Customer Success Services with defined deliverables that Sales can incorporate in proposals, create leaflets and communication plan to increase awareness.

Define **targets for your CSM team** to promote and generate revenue out of these services

Deliverables	Software Support options		
	Basic	Enhanced	Premium
Software technical support <ul style="list-style-type: none"> 24x7 case submission and technical assistance. 	✓	✓	✓
Initial response <ul style="list-style-type: none"> Response time service level objective for Severity 1 and 2 cases. 	60 minutes	30 minutes	15 minutes
Software updates <ul style="list-style-type: none"> All software release updates of the supported product. 	✓	✓	✓
Knowledgebase and online resources <ul style="list-style-type: none"> Online access to standard adoption materials, marketing materials, all support tools, and product knowledge. 	✓	✓	✓
Prioritized case handling <ul style="list-style-type: none"> Priority handling of cases by Software Support option. 		Prioritized case handling over Basic tier	Prioritized case handling over Enhanced tier
Software configuration guidance <ul style="list-style-type: none"> Support and guidance for software deployment, updates, migration and performance maintenance. 		✓	✓
Direct access to experts <ul style="list-style-type: none"> Direct access to technical support experts. 		✓	✓
User adoption <ul style="list-style-type: none"> Identify use cases based on the customer's business processes and practices impacted by the product capabilities. Aligning the expected outcomes to the product or feature will provide promotional opportunities and "quick wins" for adoption. 	*	✓	✓
Technical adoption support for software integration <ul style="list-style-type: none"> Technical adoption support for integrating and deploying software into the IT environment. Includes initial training on best practices for interacting with Cisco Technical Support, ongoing guidance for supporting internal users and periodic system risk evaluations. 		✓	✓
Learning and training recommendations <ul style="list-style-type: none"> Recommendations for pertinent learning and training available on Cisco.com or the Cisco Learning website. 		✓	✓
Advanced technical adoption business reviews <ul style="list-style-type: none"> Review of the customer's business against the adoption plan to see how the customer is tracking against KPIs, feature usage, training and determine go-forward plan for the next quarter. 		2x/year	4x/year
Designated service management <ul style="list-style-type: none"> Assigned expert with specialized technical knowledge of the customer's Cisco software solution. Product-level expert providing incident management, case escalation management and change management. Provides product-level support geared toward the customer's specific environment including proactive consultation for integrating software features into customer workflows, advise on upgrades, migration and expansion, and software configuration reviews and recommendations to reduce service disruptions. 			✓
Advanced support analytics <ul style="list-style-type: none"> Support case analysis for Severity 1 and 2 issues with best practices to reduce support cases. Periodic technical reviews of overall operational performance. 			✓

* User adoption services are provided with some subscriptions. Entitlement may vary.

ADOPTION PLANNING

- Vision & strategy alignment
- Governance / Decision making authority
- Onboarding

CONSUMPTION MONITORING

- Adoption/usage monitoring
- Adoption scoring
- Adoption benchmarking vs. peers
- Business KPI monitoring
- Business KPI scoring
- Business KPI benchmarking vs. peers
- Industry-specific business metric dashboards

CONSUMPTION OPTIMIZATION

- Customer Success Manager
- Account reviews
- Feature deployment & utilization assistance
- Industry-specific feature utilization training
- Assessment/audit of current state/goals/gaps
- Best practice playbooks
- Success story webinars
- Web-based workshops
- Super user programs
- User group meetings
- Performance optimization based on best practice insight
- Capacity analysis & optimization based on best practice insight

PROCESS CONSULTING

- Business or workflow process improvement
- Best practice consulting / advise
- Co-develop new capabilities with customers to deliver innovation to the market

Customer Experience Specialization Customer Success Practice Questionnaire

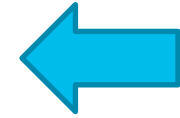
Cisco Partners applying for the Customer Experience Specialization may fill out this questionnaire or the power point version and upload it into PMA. All questions are mandatory.

1) Company Overview: (Please attach power point file if available)

Please provide an overview of your company and your unique value proposition.	
How does your company differentiate itself with lifecycle services?	
Where are your office locations and in which geographies do you serve customers?	
Please provide an overview of your organization structure.	
Describe your industry focus and ideal target customer.	

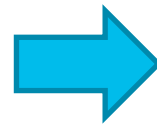
2) Business Plan: (Please attach an org chart including Customer Success organization)

Please describe your company's strategy and goals.	
Have you clearly defined a business plan relative to your customer success and lifecycle services revenues, margins, operating expenses, and required investments?	



Application
You include all the info
about your company
capabilities & your
Lifecycle & CS Practice

2 x Customer References
How you have executed
your CS Practice



Customer Experience Specialization Customer Reference Template

Partner Contact Information:

Partner Name	
Customer Success Practice Lead or Customer Success Manager	
Phone Number	
Email Address	

Customer Contact Information:

Customer Name	
Customer Contact	
Cisco Sales Order or Customer Purchase Order	Here you place the Cisco SO Number of the project that you have delivered Adoption on and covers the below reference case

What is a Customer Reference: The reference case is a description of how you engaged with the customer stakeholders using your Customer Success practice methodology, in order to achieve specific Business Outcomes that you had agreed with the customer when discussing the case. The reference case as a minimum should include the below elements:

Overview of Business Problem:

Describe here the Business problem or problems you tried to solve delivering Adoption utilizing the specific technology sold to the customer. The technology could resolve technical problems as well but mainly you need to describe how you helped the customer to solve Business issues and pain points that helped the business improve or resolve issues.
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7 Steps to CX Specialization



Questions ?