Master Specialization Program—General Audit Q&A

Q. How does a partner initiate the Master Specialization audit?

Partners must complete certain program requirements prior to scheduling the audit for the program, refer to the Masters UC or Security program requirements page and look at the Step 1: Pre-Audit Validation for more information. Once a partner has completed these instructions, they can upload supporting documents and submit for an audit via the Cisco Certification and Specialization Application (CSApp).

Q. Once pre-requisites are met and the application is submitted, how soon does the audit take place?

Upon successful pre-audit submission, the partner and PAM will receive an e-mail from the auditing firm with an audit date within 60 days.

Q. Who participates in the on-site audit?

Master Specialization audit participants include the partner, Cisco, and a 3rd party auditor.

Q. How are schedules managed for the Master Specialization audit?

The Master Specialization audit is performed by a 3rd party auditor, therefore scheduling the audit dates/times will require communication and coordination between the Partner, Cisco, and Auditors. Effort should be made by all participants to accommodate schedules and provide flexibility to the process.

Q. Who selects the Cisco Subject Matter Expert (SME) for the solution demonstration portion of the audit?

The Cisco team supporting the partner, including the Partner Account Manager (PAM) and Systems Engineer (SE), should designate the Cisco Subject Matter Expert (SME) who will evaluate the technical aspects of the Partner’s customer scenario and solution demonstration. Securing and scheduling the Cisco SME is the responsibility of the PAM and Partner SE, as part of the overall scheduling process for the Masters Specialization audit.

Q. How many persons from each organization are present during the on-site audit?

The partner may use as many individuals as required to be successful, including executive sponsors, management, sales, and engineering personnel. Cisco attendees will include the Partner Account Manager (PAM), Systems Engineer (SE), and a Subject Matter Expert (SME). The 3rd party auditor typically sends one auditor.

Q. Who is present for the solution demonstration portion of the audit?

There is no requirement or limit on the amount of individuals that participate in the demonstration during the on-site audit. Cisco recommends limiting the number of presenters to ensure the demonstration is completed in the allotted time. The partner typically has 2-3 individuals in the room fulfilling both sales/business and technical/engineering roles. Partners are encouraged to treat this like a real customer visit and have resources available for troubleshooting and Q&A during the demonstration. Other attendees for the demonstration will include the Partner Account Manager (PAM), Systems Engineer (SE), Subject Matter Expert (SME), and the 3rd party auditor.

Q. How should a partner prepare for the Master Specialization audit?

Partners should work closely with the Cisco Partner Account Team and extended Advanced Technology team to prepare for the audit. Cisco Audit and Policies Documentation outlines all audit requirements in detail to ensure partners can properly prepare for the on-site audit.
Q. When it comes to the Audit, there are overlapping requirements that exist for both Gold and Master Partners. Does being Gold certified satisfy those overlapping Master requirements or does a partner still need to cover these requirements during their Masters audit?

It depends on the timing of the Master audit from the Gold audit. Cisco will always try to align the audit dates so we can audit at the highest level of requirements, across programs. If the Masters audit is within three months of the Gold audit, Cisco will conduct a gap audit and the agenda will clearly specify what will be evaluated. If the Masters audit is more than three months after the Gold Audit, a partner will be responsible for satisfying all requirements during the audit.

Q. What are the best practices for partner and Cisco team preparation?

- Cisco Partner Account team should seek executive sponsorship from the Partner to ensure adequate time, resources, and personnel are dedicated to the audit. Partner management must recognize and respect time out of the field for sales, pre-sales, and engineering resources as part of the audit preparation. It is not uncommon for Partner personnel to have their calendars dedicated exclusively to the audit for the week prior (final prep) and week of the actual audit.
- The Partner may want to schedule regular planning meetings leading up to the audit date, including weekly meetings starting about a month prior to the audit. This time allows for the creation, validation, and walkthrough of Master Specialization collateral and demonstrations. Cisco Partner Account teams are encouraged to be in attendance.
- Two weeks prior to the on-site audit, the Partner should solicit feedback on their collateral and presentations by coordinating demonstrations with both Partner and Cisco personnel, such as Systems Engineers, Account Managers, and Sales Managers. This process will provide valuable feedback to the presenters from both sales and engineering perspectives.
- Partners may want to create a list of assumptions and background information to support and facilitate the solution demonstration portion of their audit. This document can include more detail about hypothetical customer situations, events, financials, industries, regulations, proposed Cisco bill of materials (BoM) etc, and should be reviewed at the beginning of the solution demonstration.
- Partners are encouraged to print copies of their presentations, assumptions, collateral, and checklist for the customer scenario and solution demonstration portion of the audit.

Q. What are recommended hardware and software for the Master Security demonstration?

Cisco recommends that partners use any hardware and software they require to demonstrate the complete customer solution. Below is a baseline that partners can use to help build-out their lab.

**Software:**
- Cisco Security Manager 4.1 (Windows 2K8, 2K8R2)
- ACS 5.1 or ISE (Either on 1121 Appliance or VMware ESX 4.X or ESXi 4.X)
- AnyConnect Secure Mobility Client 3.0 on Windows XP/Vista/7 Client

**Hardware:**
- Minimum 2 Routers
  - 1900 Series, IOS 15.X (Security Feature Set)
  - 2900 Series, IOS 15.X (Security Feature Set)
  - 3900 Series, IOS 15.X (Security Feature Set)
- ASA 55XX w/ 8.3+
- Ironport WSA w/ AsyncOS 7.0+ (Secure Mobility License Required)
- IPS Module for ASA or IPS Appliance w/ 7.0+
- 1 Switch capable of 802.1x
  - Cisco Catalyst 6500 Series Switches, Cisco IOS 12.2(33)SX1+
  - Cisco Catalyst 4500 Series Switches, Cisco IOS 12.2(50)SG+
  - Cisco Catalyst 3750, 3560, and 2960 Series Switches, Cisco IOS 12.2(50)SE+
Q. Does a partner need all of the appliances and hardware for the demonstration or can some of these be virtualized?

Partners can virtualize hardware and software for the demonstration as allowed by Cisco licensing and NFR agreements. Partners are encouraged to use the demonstration solution that best enables them to successfully meet all requirements.

Q. Should partners follow the checklist order during the demonstration?

Partners are encouraged to follow the checklist order during the demonstration to facilitate grading by the auditor. If a partner does not follow the audit checklist sequence, they should identify what section they are working on to receive proper credit for their effort. Cisco developed the customer scenario to follow a logical sequence, but the Partner is permitted to modify this order to support presentation flow.

Q. What are the customer reference account guidelines for deployment timeframes?

Partners can submit reference accounts for deployments started or completed up to 18 months prior to the pre-audit submission. The look-back period was recently increased to 18 months, from the previous allowance of 12 months.

Q. Can a partner submit a customer as a reference account if they did not source the original hardware and software?

The partner does not need to source the hardware when contract vehicles or customer requirements prevent it. The partner applying for Master Specialization must be the primary provider of design and implementation for the customer. The Cisco account team and channel SE will validate all references prior to submission.

Q. Can a customer be re-used as a reference for multiple requirements?

Each customer may be used for only one reference account. The same customer can be used for a customer reference and security assessment reference account. However, the same customer cannot be re-used from a previous audit if the solutions implemented are identical.

Q. Can a partner use a customer reference that is similar to, but does not exactly meet the requirements outlined in the customer reference checklist?

As part of the pre-audit, partners must upload the customer reference checklist. If a partner feels they have references that are very similar in terms of technical skill needed to implement, they can go over these with their Cisco SE who is responsible to sign-off on all references, and submit requests for exceptions to the Master Specialization program team.

If the Cisco SE agrees that the reference is a good substitution, the partner should document what was deployed and how it is in their eyes equal to the requirements Cisco is requesting. Partners are encouraged to fully document justification for all substitutions in the customer reference account deployment document.

Q. For Master Security, can a partner use the same customer for both a vulnerability assessment reference and the security assessment requirement for a customer reference?

No, three unique customers are required for the vulnerability submission and up to two additional customers may be used to satisfy the security assessment requirement for a customer reference. For each customer, the partner should complete the security assessment document (see Master Security Assessment Example 1 posted at www.cisco.com/go/audit).
Q. Can a partner outsource any of the requirements/business practices which they have to demonstrate as part of the Audit?

Partners can outsource some of the operate phase requirements as indicated in the Channel Program Audit & Policies document, identified with s/c. During the audit, partners will be required to show evidence that the combined partner and outsource partner offerings meet all program requirements. Partners may be required to show evidence of and details from the outsourcing agreement. Partners cannot outsource customer references, security assessment references, or demonstration requirements.

Q. Does a partner need to supply sales order and serial numbers for Cisco hardware used by the partner during the demonstration portion of the on-site audit?

Upon request, the partner must have serial number(s) and relevant sales/NFR information available for review by the auditor and/or Cisco SME. The partner may not use Cisco-owned equipment for the demonstration.

Q. Does the version or release for Cisco solutions in the demonstration environment need to be the latest available software from Cisco.com?

The Cisco solutions demonstrated do not need to be running the latest code, but it is encouraged. Cisco and the auditors are more concerned with the partner’s ability to demonstrate business value and show technical competence during the demonstration portion.

For more information please visit: