

Virtual Expertise

Collaboration technology and virtual access to experts provide a sea change in the presales support process.

Like many companies that sell complex products, Cisco relies on a relatively small number of technical sales specialists to support a much larger number of salespeople, such as account managers and channel partners. Historically, Cisco's sales specialists focused on specific market segments and technology areas and were assigned to work with all of that segment's sales teams in a local area. This way of working had several drawbacks, both for the specialists and for Cisco as a company.

Account managers routinely contacted their sales specialist for myriad questions or a resource need that arose in the process of making a sale, ranging from a routine technical query, to research for customer references, to traveling to a customer's site for a sales discussion. In the end, sales specialists were spending only about 30 percent of their time on strategic activities such as interacting with customers.

The specialist's time was further constrained by inefficient, uncentralized resources. For example, Cisco did not have formal processes or tools for finding the right technical expert to address a specific issue. And there was no easy way for the specialists to collaborate or share knowledge and resources with one another.

This burdened system not only hindered Cisco's ability to meet the company's long-term sales targets but didn't allow sales specialists to focus on subareas within Cisco's sophisticated and complex product lines and technologies. Sales specialists needed ways to work more efficiently, collaborate easily with other experts, and develop more focused product expertise to keep pace with an increasingly competitive marketplace.

Enter Cisco's Specialist Optimization Access and Results (SOAR) program. A major initiative in the U.S. and Canada, the SOAR program is transforming the sales process by using video, and collaboration, communication, and Web 2.0 technologies to scale access to specialists' expertise.

"This project is changing our selling model from one that depends on 'tribal knowledge' and sequential conversations to one based on Web 2.0, collaboration, and rapid response," says Patrick Romzek, director of Advanced Technology for the U.S. and Canada, Cisco Sales. "New SOAR tools and processes are allowing us to accelerate communication, provide real-time access to specialists, and leverage deep expertise throughout Cisco in a way we have never before experienced."

Instead of serving as the single, first person to contact for any and all sales questions, the specialists now handle fewer routine inquiries and tasks, freeing up their time to focus on more complex, strategic activities. At the core of the on-demand resource system is the "technology solutions network," a team of highly skilled engineers available in real time to answer questions and assist in network designs and other consultative services.

"The TSN [technology solution network] engineers help the specialists respond to a customer's question immediately or in just a few hours, where before it might have taken a few days while we tried to find the right person or information," says Jon Grady, a systems engineering manager at Cisco.

Another key element of the SOAR program is an arsenal of self-help resources, including a reference database that allows immediate access to Cisco product references, repeatable product demonstrations, and a knowledge-based wiki where users can find immediate access to common questions and issues that frequently arise in a sales situation. With these self-help tools, sales personnel can often find the answers and information they need without contacting a specialist.

“We are also providing tools that identify and provide access to technology experts and other sub-specialists throughout the U.S. and Canada who are available for collaboration or virtual customer interactions,” says Romzek.

The Expert Locator tool, for example, enables a Cisco salesperson or technical solution network engineer to view an expert’s profile and click to connect with that specialist in real time through an online chat session, a telephone or video call, or email. Availability of the specialist is detected through real-time presence information provided by the Cisco Unified Personal Communicator and the Cisco Unified Application Environment, along with location data provided by Google maps.

The SOAR program is already paying off in increased productivity, enhanced collaboration and knowledge sharing, and improved work-life balance for participating sales and technical specialists. Within 60 days of the program launch, specialists reported a 45 percent increase in their interactions with customers and external parties. And more than 70 percent of the participating specialists surveyed reported improvements in their quality of work-life balance.

For case studies on how other sales, support, and development teams across Cisco are benefiting from unified communications technologies, see the [Cisco WebEx Connect Workforce Experience](#).



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