



Canada CSAT Best Practices



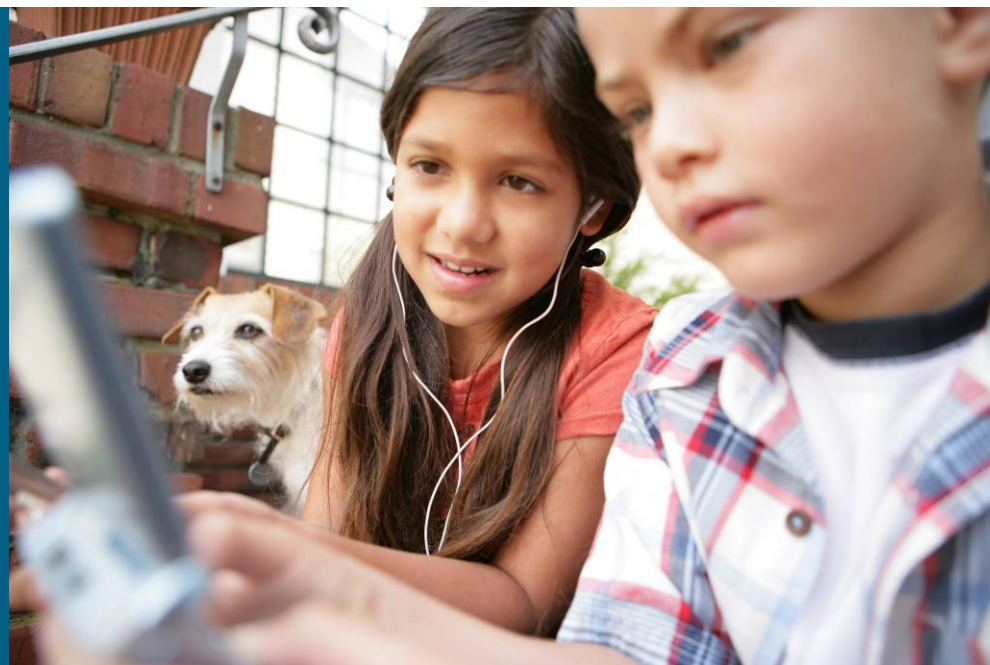
FY10 Update

Agenda

- How to Schedule & Send Surveys
- Key Questions for Your Customers
- Best Practices

www.cisco.com/go/pal

Sending/Scheduling



Partner Access onLine - Partner Central - Cisco Systems - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <http://tools.cisco.com/WWChannels/PAL/gsat/sendSurvey.do> Go Links

Partner Access onLine Overview | **Send Surveys** | Reports | User Access Related Tools

Currently Viewing: TELUS COMMUNICATIONS

Customer Satisfaction Select Survey

Jump to a Section

Send Survey

[Click Here](#) to do any of the following:

- Send a new survey
- View the status of a scheduled or sent survey.
- Manage survey contact information (i.e. update email addresses).

Click [Here](#) for additional information about this page.

Introduction

Survey experience has shown a typical return rate of 15 to 20 percent. This may be helpful to you in planning the number of end customers you invite to take the survey.

You may view demo versions of the survey and letters that will be sent to the end customers you enter.

- [Survey](#)
- Letters ([PreInvitation](#), [Invitation](#), [Repeat Invitation](#), [Reminder](#), [Thank You](#))

Done Local intranet

start 4 Microso... 5 Interne... 4 Microso... 2 WebEx ... 2 Microso... 100% 10:30 AM

Schedule Survey Requests:

Click Send Surveys Tab

Enter information on new customer contacts and schedule new & existing customers to receive a survey for the year.

“Reserve” your customer contacts early! Cisco allows each unique email address to be surveyed only once per fiscal year.

Entering a Customer Contact

The screenshot shows a web interface with two tabs: 'CUSTOMER SATISFACTION' and 'PARTNER RELATIONSHIP'. The 'Send Surveys' tab is active, and a blue arrow points to it from a text box. Below the tabs are navigation links: 'Overview', 'Send Surveys', 'Reports', and 'User Access'. The main content area is titled 'Customer Satisfaction Select Survey' and includes a 'Back to Introduction' link and a 'Jump to a Section' dropdown menu. A section titled '* New Enhancement in PAL Customer Satisfaction *' provides instructions on pre-selecting technologies and resending surveys. Below this is a 'Send a Survey' section with a form containing four input fields: 'Customer Company Name', 'First Name', 'Last Name', and 'Email Address'.

Under the “Send Surveys” tab, you can enter in a new customer, then you can schedule that customer to receive the survey.

*** New Enhancement in PAL Customer Satisfaction ***
Partners can now pre-select technologies delivered to end customers when sending Customer Satisfaction survey requests. Pre-selection of technologies is recommended for all partners participating in VIP.
Note: You can pre-select technologies for end customers already sent a survey request but where the end customer has not yet responded. Select contacts to resend a survey request, click resend, and now edit contact info (pre-select technologies) prior to completing the resend.

Send a Survey

To send a new survey, enter end-customer information, select the appropriate country and customer language, enter the date to send the survey and click the “Submit” button.

Customer Company Name

First Name

Last Name

Email Address

Partner Access onLine - Partner Central - Cisco Systems - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print Mail Stop Forward Back

Address <http://tools.cisco.com/WWChannels/PAL/gsat/surveyStatus.do#status> Go Links

Note: You can pre-select technologies for end customers already sent a survey request but where the end customer has not yet responded. Select contacts to resend a survey request, click resend, and now edit contact info (pre-select technologies) prior to completing the resend.

[[Return to Top](#)]

Assessment Status

Below is the status of your surveys and contacts. Use the "Filter by" of sent surveys, scheduled surveys, surveys not scheduled/sent, and contacts who refused survey and contacts that can be deleted.

Click [Here](#) for additional information about this page.

Survey Contacts for: ABConsulting(Canada)

Filter by:

- Undeliverable Email Addresses
- Delete Contacts
- Contacts Refused Survey
- No Surveys Scheduled/Sent
- Scheduled Surveys**
- Survey sent

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [All](#)

The results of your search are listed below. You have 1 results. 1 starts with: ALL

[[Return to Top](#)]

Contacts & Feedback | Help | Site Map
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For existing customers, go to the drop down menu and click on **Scheduled Surveys**. Here you can see all of your customers. Schedule the date(s) you wish have the survey requests sent (one per customer email address), and the tool will send it as scheduled.

TIP: If you don't know when you want to send your customer a survey, simply choose a date late in the Cisco fiscal year. This will "reserve" your customer and ensure that you don't lose this contact to another partner. You can follow up to adjust the date to be more strategic about the actual customer contact (following a successful deployment, for instance).

Q. What is the difference between the results shown on the Overview Screen vs. the CSAT Year Screen in PAL?

Overview Screen Quick View: Provides partner survey results within the *Cisco fiscal year* (August thru mid-July following year).

Address <http://tools.cisco.com/WWChannels/PAL/gsat/home.do?overview=true>

PAL Overview
The Cisco Channel Partner customer satisfaction score is a quantitative measure of the partner support that a Cisco end customer experiences. Cisco uses an independent company to survey end customers and to obtain an objective customer satisfaction score.

PAL Announcements:
FY10 SURVEY IS NOW OPEN!!!
The FY10 Cisco CSAT Survey is open as of Aug. 1st, 9am PDT and will close on Friday, July 16, 2010 at 5pm PDT. Remember to reserve your customer names early. An individual customer contact can only be sent a survey invitation once in a Cisco fiscal year.

[View Results for CSAT Year](#)

Click [Here](#) for additional information about this page.

Quick View

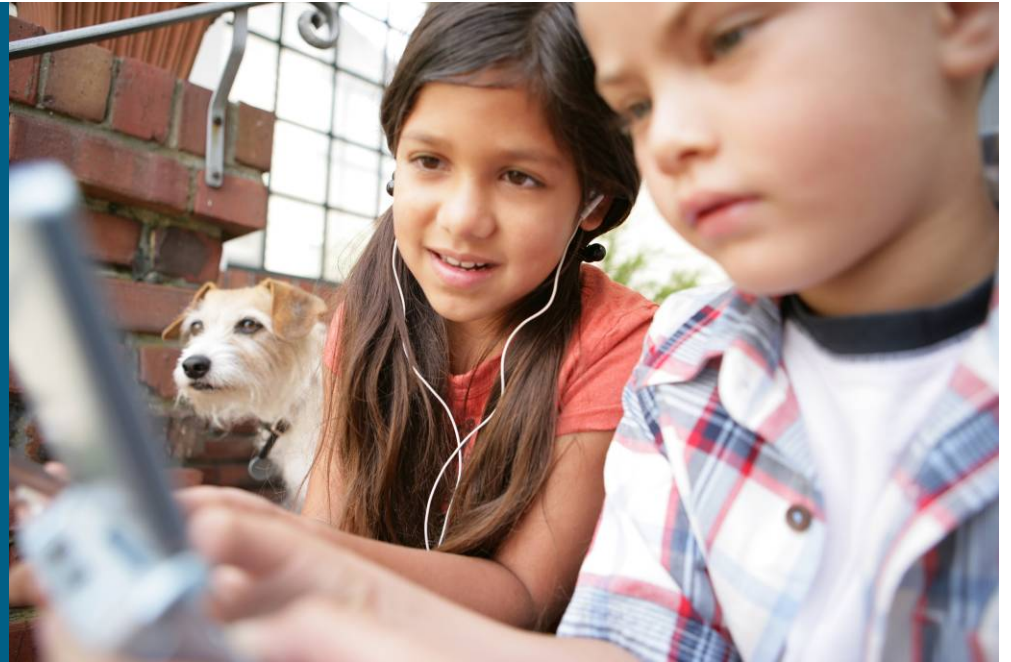
Quick View - Cisco Fiscal Year for TELUS COMMUNICATIONS(Canada)			
Your Overall Satisfaction Score	5.00		
Theatre Objective	4.40		
Your Survey Requests Sent	2		
Total Valid Responses from Surveys You have Sent	1		
Total Valid Responses from Surveys Sent by Other Sources	0		
Total Valid Responses from All Sources	1		
Replies to the Surveys You've Sent (2 Total Requests)			
Rated You as Their Partner	Rated Another Partner	Did Not Rate a Partner	Total Responses
1	0	0	1

Data Valid as of 17-Aug-2009

Information Only: Below represents all survey responses, including Cisco Sourced, Partner Sourced, and Random Sourced surveys sent during the survey year where your company was named and rated for

View Results for CSAT Year: Click this link to see survey results for either end Q2 or end Q4 periods

Essential Questions



Q. What Questions are Required for the Survey to be Considered as PAL Valid?

Survey Logic which leads respondent to required questions in the survey

- Q132 - Do you wish to evaluate this partner? = **YES**
and
- Q132b - Do you wish to evaluate this partner? = **YES**
and
- Q108 - Do you work for a company that is a Cisco partner, reseller, or integrator who uses or implements Cisco equipment in the networks of other companies? = **NO**
and
- Q13 - Do you obtain Cisco network products or systems from a Cisco Pre-Sales Channel Partner, Value Added Reseller, Vendor or Service Provider? = **YES**
OR
- Q18_A - Do you obtain Cisco network products or systems from a Cisco Pre-Sales Channel Partner, Value Added Reseller, Vendor or Service Provider? = **YES**
and
- Q19_2 - Do you have a (partner name) support contract to service your Cisco equipment? = **YES**

Q. What Questions are Required for the Survey to be Considered as PAL Valid?

- Q14_A_1 - Select your Cisco Pre-Sales Channel Partner or Please enter your Pre Sales Channel Partner's name in the field below = **SELECTED or POPULATED**
and
- Q15 - Overall, how would you rate your overall satisfaction with the Pre-Sales Support provided by (Partner name) = **Very Satisfied, Satisfied, Neutral, Dissatisfied or Very Dissatisfied**
OR
- Q14_B_2 - Select your Cisco Pre-Sales Channel Partner or Please enter your POST Sales Channel Partner's name in the field below = **SELECTED or POPULATED**
and
- Q18 - Overall, how would you rate your overall satisfaction with the Post-Sales Support provided by (Partner name) = **Very Satisfied, Satisfied, Neutral, Dissatisfied or Very Dissatisfied**

Q. What are the Requirements for VIP Eligibility?

Customer contacts must answer the **survey questions to be considered as PAL valid survey** (previous two slides)

- Surveys are **Partner sourced** only

Partner must be enrolled in VIP

Partner must attain VIP Target Score = **4.5**

Q. I sent a survey to my end customer...but they said they did not receive it. Why?

- Let your customer contacts know the email is coming from Walker.com, not from Cisco or you directly. They should check their spam folder to see if it appears there.

OTHERWISE:

- Some end customer companies are running anti-spam filtering software on their email systems. In some cases, these filters delete the emailed survey invitation prior to it reaching the end customer contact's email queue. The contact does not see the survey invitation and may ask the partner to send another survey, which will again be caught in the anti-spam software program.
- This is a global email issue; we are unable to solve it within PAL or the survey engine at this time. If you are faced with this issue, please open a help case (a link to the help desk is on the PAL home page). The case must include:

Your Company Name

Your Country

The email addresses of those contacts not receiving the surveys

- Once you provide the above information, a request will be made to Walker Information to send the survey to the end customer contact via an alternative email process.

Q. I am trying to enter contact information and send a survey to an end customer that I sent a survey to last year. However, the system is giving an error message that this contact's information has already been entered in PAL.

- View your Send Survey filter: “No Surveys Scheduled/Sent”. This filter displays the contacts you sent a survey to the previous year. Once a contact has been entered in PAL, you do NOT need to re-enter it the following year.

Q. I am trying to send a survey to an end customer and I get an error message: “This contact has already been sent a survey...”. How can this be, I have not sent it yet?

- There are three Sources for Sending Surveys

Partners

Cisco Direct Sales

Mass Secondary Send

- Access PAL early in the survey year to enter new customer contact information, and reserve/schedule your existing PAL contacts so that no one else can select these contacts.

Q. How long does it take to update a survey response in PAL?

- It depends on the actual time the survey responses are provided:
 - If a response is entered prior to 6:00 PM (Pacific Time), it will be updated in PAL after 6:00 AM (Pacific Time) the following day.
 - If response is entered after 6:00 PM (Pacific time), it will be updated in PAL the in two days.
- This information becomes critical, especially at the end of a VIP program period. Ensure that your customer contacts are aware of the importance of a timely response to the survey request.

Q. I see a survey reply from my end customer in PAL, but I don't see their response on the Pre- and Post-Sales Download reports, or in the VIP tool. Why?

- Reason #1 – The end customer merely opened the survey, which logs the survey as being replied to. The reply information in PAL only reflects whether the survey has been received and opened, NOT whether the end customer rates the partner. This can only be determined by reviewing the reports in PAL or the VIP tool.

- Reason #2 – The end customer opened the survey, and answered “NO” to the following questions:

Do you obtain Cisco network products or solutions from a Cisco Pre-Sales Channel Partner, Value Added Reseller, Vendor, or Service Provider?

Do you obtain Cisco network service or support from a Cisco Post-Sales Channel Partner, Value Added Reseller, Vendor or Service Provider?

With a “NO” response, the end customer is never presented with the pre- or post- sales partner questions.

Q. What are the Partner Certification Program Critical Survey Questions for Valid CSAT Response?

- All survey responses count, theatre target = 4.4
- Respondent selects “Yes” to the demographics question at the beginning of the survey

Do you obtain Cisco network products or solutions from a Cisco Pre-Sales Channel Partner, Value Added Reseller, Vendor, or Service Provider?

Do you obtain Cisco network service or support from a Cisco Post-Sales Channel Partner, Value Added Reseller, Vendor, or Service Provider?

- Respondent selects “Yes” when asked the following question, or selects another partner to rate

The name of the Channel Partner that sent you this survey invitation has been inserted above for your convenience. (Partner identified to respondent is the partner that initiated the survey sent within PAL)

Do you wish to evaluate this partner?

- End customer provides an overall pre- and/or post-sales satisfaction rating
- Response must be received by published year end survey closure date (mid July date)

Q. What are the Shared Support Program Critical Survey Questions for Valid CSAT Response?

- All survey responses count
- Respondent selects “Yes” to the demographics question at the beginning of the survey

Do you obtain Cisco network service or support from a Cisco Post-Sales Channel Partner, Value Added Reseller, Vendor, or Service Provider?

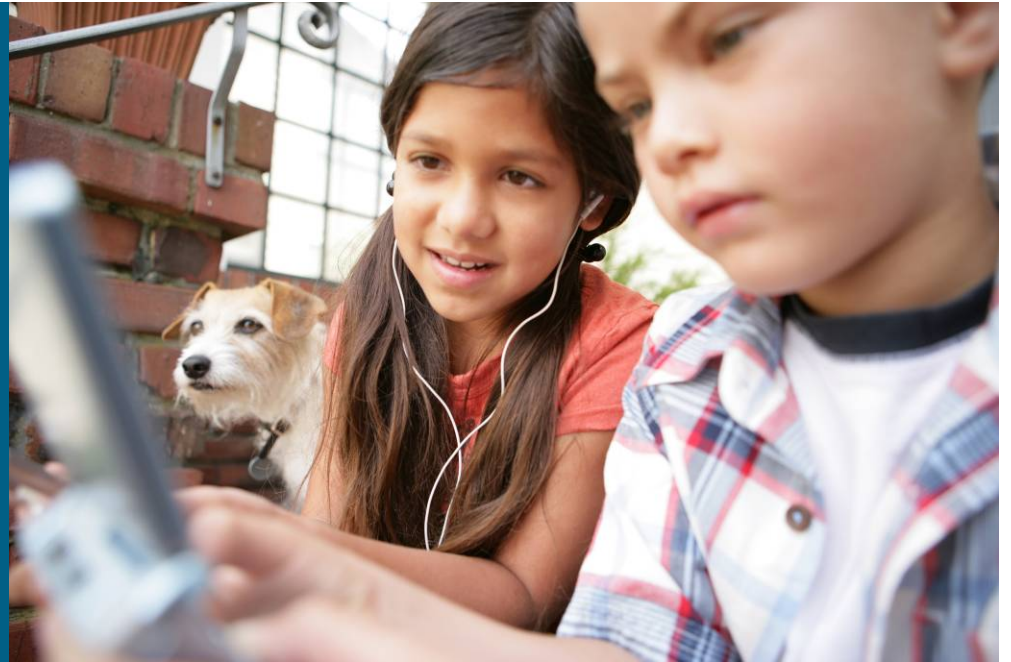
- Respondent selects “Yes” when asked the following question, or selects another partner to rate

The name of the Channel Partner that sent you this survey invitation has been inserted above for your convenience. (Partner identified to respondent is the partner that initiated the survey sent within PAL)

Do you wish to evaluate this partner?

- End customer provides an overall post-sales satisfaction rating
- Response must be received by published year end survey closure date (mid July date)

Best Practices



Customer Awareness & Best Practices

- Be strategic when selecting customer contacts to survey to minimize the number of surveys you send in a year. One survey can support multiple program requirements (VIP + Certification + Services). Review your customer base to see where you have overlap and send a single survey to support your multiple survey requirements. To assist in this, the VIP tool provides a listing of all your eligible customers (by technology) for the VIP period.
- Send the survey after a successful Cisco solution deployment with your customer to avoid a rush to send multiple surveys toward the close of your certification year or your VIP period.
- Before you send your customer a survey, it's a great idea to contact them and advise them that it will be arriving via email and to watch out for it. Because the survey invitation comes from Walker, and not from you or Cisco Systems, customers might delete the survey, thinking it is spam.
- Explain to your customers the value of their responses and the integral role these surveys play in your partnership with Cisco.
- Provide the key questions your customers need to ensure they answer (slides 9-11).
- After the survey has been sent, follow up with your customers to ensure they received and filled out the necessary questions and to thank them for their time.

Sample Annual Schedule

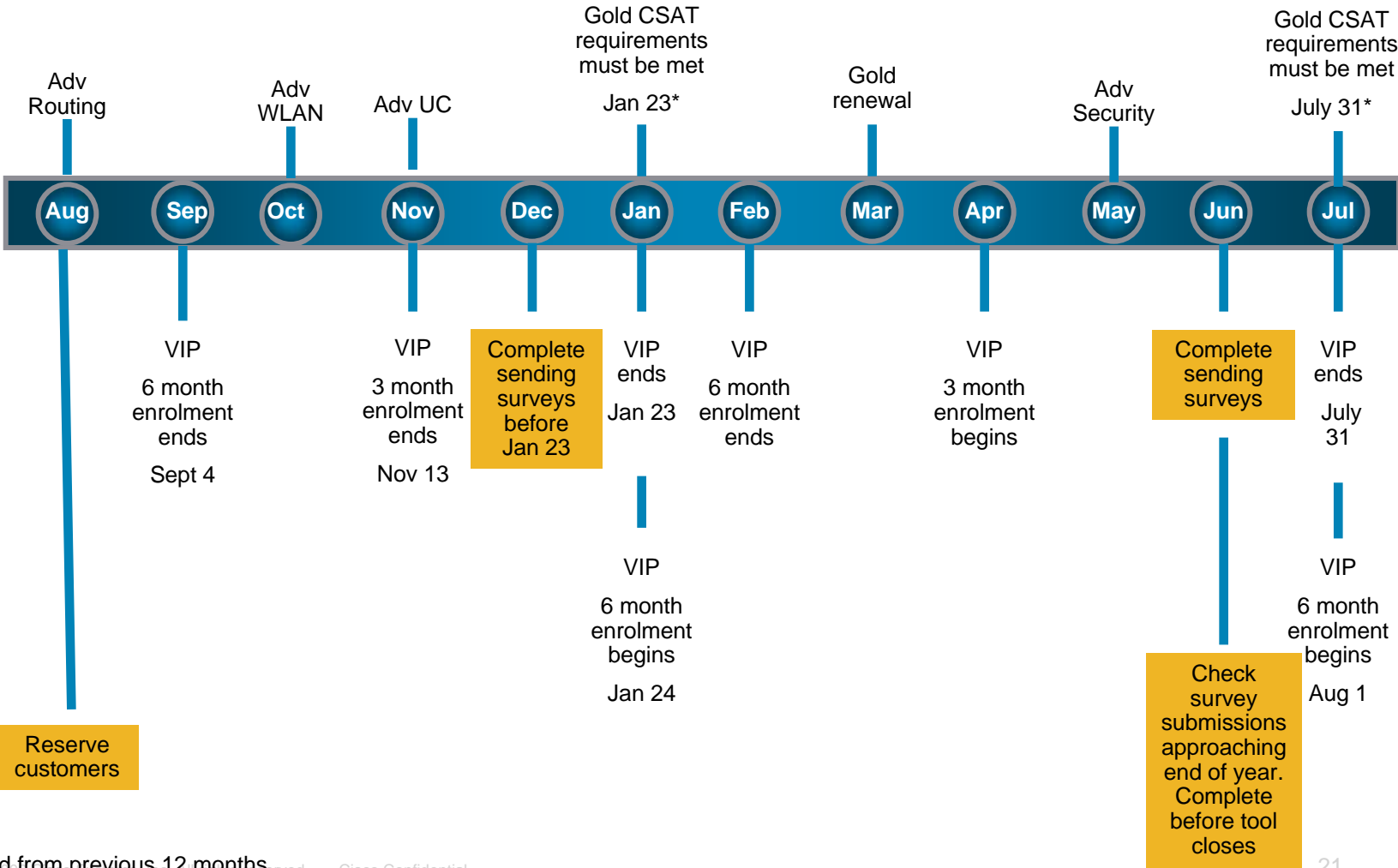
Gold Partner with Annual Renewal in March, participating in VIP

Certifications

Specializations

Value Incentive Program

Admin



*CSAT surveys counted from previous 12 months. Cisco Confidential

