



Master Specialization Companion Document

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Section I: Introduction and Audit Pre-Requisite Guidance

1. Introduction to Master Specialization Program

The Cisco Master Specialization Program is directed to partners that have demonstrated expertise in selling, deploying, and supporting Cisco solutions. Partners with a highly qualified practice in a given technology can achieve a Master Specialization, regardless of their certification level.

As part of the Master Specialization qualification process, the partner will be asked to produce documentation in addition to what is required on the specialization application. Examples include, but are not limited to:

- Proof of personnel employment
- Validation of third-party personnel certifications
- Review of specific business processes and performance to process metrics
- Evidence of proficiency in particular technologies

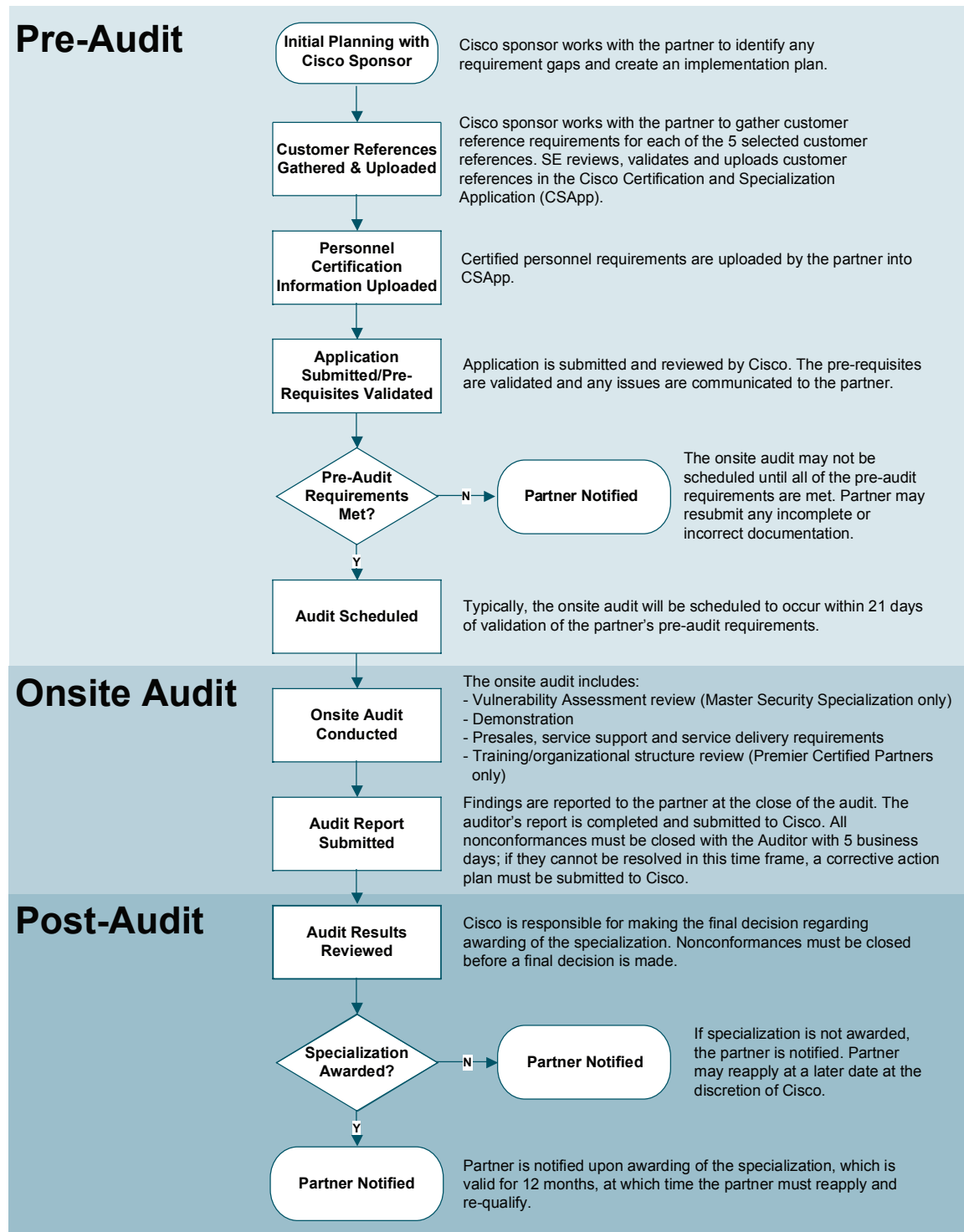
This document provides guidance for the partners, Cisco account team members, auditors, and others involved in preparing for the Master Specialization audit. This document is meant to be used in conjunction with the [Cisco Offer-Based Audit and Policies Document](#).

The requirements for Master Specialization include:

- Meeting pre-requisites
- Demonstration skills
- Presales/planning, design and implementation
- Service support
- Service delivery

This document should be used in conjunction with the [Cisco Offer-Based Channel Model Audit and Policies Document](#) to help qualify and prepare partner candidates for their Master Specialization audits.

2. Master Specialization Audit Process Flow



3. Pre-Audit Process

Planning Process

Cisco CAM & SE

- Review the consolidated audit document. Visit [Partner Central](#) to learn more about the Master Unified Communications and/or Master Security Specialization Program requirements and process.
- Before initiating a discussion with your partner, assess their readiness to achieve Master Specialization. If you determine that the specialization is attainable, discuss the specialization requirements with your partner to help guide their decision to apply. Identify any requirement gaps and create a development plan. Make sure your partner reads and understands the Master Specialization audit document and associated requirements and benefits.

Pre-Audit Process

Some requirements must be met prior to scheduling the on-site audit.

- Partner submits an application via the CSApp tool, with help from Cisco sponsor. Go to: <http://tools.cisco.com/WWChannels/cpapp/home.do>
- Partner receives an e-mail describing the pre-audit requirements.
- As part of the validation process, partner provides/uploads the following pre-requisite documents into CSApp:
 - Master Unified Communications
 - Advanced Unified Communications Specialization: System validates
 - CCIE Voice*: Partner provides individual's name and CCIE certificate number
 - PMP or Prince II certification: Partner uploads certificate
 - UCCE or RMC Cisco Authorized Technology Provider (ATP) Program*: System validates
 - Master Security
 - Advanced Security Specialization: System validates
 - CCIE Security*: Partner provides individual's name and CCIE certificate number
 - PMP or Prince II certification: Partner uploads certificate
 - One of the following third-party industry certifications: Partner uploads certificate
 - GCIH (GIAC)
 - GSNA (GIAC)
 - CISM (ISACA)
 - CISA (ISACA)
 - GCSC (GIAC)
 - GSLC (GIAC)
 - GCI (GIAC)
 - Master Unified Communications or Master Security ISO 20000-1 or BS 15000-1*
 - Partner uploads certificate
 - Evidence of current ISO 20000 certification is allowed as a substitute for the non-metrics part of the service delivery and service support requirements (formally the Operate Phase requirements). Partners may have other industry certifications (e.g., ISO 9001, ISO 27001), but these will not be accepted as evidence of meeting any of the requirements. These other certifications can be helpful, however, as an indication of the relative maturity of the partner's business system.

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- Pre-Audit Validation
 - Customer References (5): Partner completes one set of Master Unified Communications and/or Master Security Specialization customer reference documentation for each customer reference and sends to Cisco SE for validation.
 - Master Unified Communications or Security Specialization Customer Reference Checklist
 - Customer Acceptance documentation
 - Customer Reference Account Cover Sheet: Includes partner name, customer name, customer business issue, overview of solution provided, date implementation completed, and Cisco account team names
 - Customer Reference Review and Validation: Cisco SE reviews customer references to ensure all criteria have been met, validates the sale, and signs the Customer Reference Account Cover Sheet. Cisco SE uploads documents into the CSApp.

 - Vulnerability Assessment (Security Specialization only)
 - Template for conducting a Vulnerability Assessment is required in advance. Partner must present three completed Vulnerability Assessments at the time of the audit. These customers may be from among the five deployment customer reference accounts or they may be different customers. For more information, see: <http://www.cisco.com/web/partners/program/specializations/security/master/requirements.html>

*CCIE NOTES:

1. Partners may employ full-time contracted employees to fulfill the CCIE personnel requirements. If the CCIE is under contract (and not a full-time employee), the contract must extend a minimum of 12 months beyond the Master Specialization audit date.
2. If a partner hires a CCIE who was previously employed by another Cisco certified or specialized partner, Cisco will not count this individual toward certification or specialization for the hiring partner for a period of 12 months from the date of hire. This rule does not apply if a Cisco certified or specialized partner terminated the CCIE. In this case, Cisco will require documentation from the partner that terminated the CCIE.
3. A contracted CCIE has to be signed to a 12-month contract starting from the day of the audit.

*ATP Note: If your partner is not currently a qualified Unified Contact Center Enterprise or Rich Media Communications Authorized Technology Provider, please work with the appropriate Cisco ATP Sponsor to determine their eligibility for being invited into one of these two programs, which have their own set of stringent acceptance requirements.

Section II: Audit Process

1. Preparing for the Onsite Audit

Scheduling the Onsite Audit

- After validation of pre-audit requirements by Cisco, the partner and CAM will receive an e-mail from the auditing firm with an audit date.
- The physical audit will occur within 60 days.
- Partner will receive an agenda prior to the audit. The agenda will include the following elements:
 - Audit Goals and Methodology
 - Partner Overview Presentation
 - Cisco/Partner Relationship
 - Demonstration
 - Vulnerability Assessment: Security Specialization only
 - Operate Phase (If ISO-certified, evidence of metrics only need to be provided)
 - Review of organizational charts, training records, etc. Premier Certified Partners only
 - Closing Meeting
- Partner will ensure the right people are in attendance

Preparing for the Onsite Audit

It is imperative that the partner and the Cisco team are fully prepared for the audit.

- CAM/SE: Engage Cisco subject matter expert (SME) to evaluate the demo
- CAM/SE: Ensure partner understands all onsite requirements
- CAM/SE/Partner: Ensure all documentation is prepared
- CAM/SE/Partner: Highly recommended for the Cisco CAM/SE to conduct a “mock” audit to help the partner prepare for the audit

2. Onsite Audit Procedures

After introductions, the auditor will begin the day by explaining the audit goals and methodology. The partner will then present an overview of their company and the auditor will lead a discussion on the relationship between Cisco and the partner.

At this point, the demonstration will commence.

Introduction to the Demonstration

Partner candidates have an opportunity to demonstrate their expertise and knowledge of Cisco solutions during the demonstration portion of the audit. The intention of the demo is to ensure the partner has the skills to engage the customer in a strategic discussion to determine how Cisco solutions can solve their business problems. It is not intended to be a product demonstration.

Note: Some technologies are difficult to physically demonstrate for various reasons. In these cases, it is acceptable to allow the partner to describe the features and functions as an equivalent.

Demonstration Format

The demo is conducted in a "role-play" format. During the demo, the auditor and the Cisco SME will play the role of the customer CXO. The partner will align the demo presentation to the requirements described in the customer scenario and the demo checklist. Partners must present the demonstration in the context of a business case that meets their customers' corporate objectives and covers strategic rationale, available alternatives, and financial justification.

Cisco Sponsor Demo Preparation

- CAM/SE to schedule the Cisco SME to participate in demo portion of the audit. Always strive to engage an objective Voice or Security SME.
- CAM/SE to arrange a meeting between the auditor and the Cisco SME evaluating the demo prior to the audit to ensure mutual understanding of the:
 - CXO roles they will play through the exercise
 - Probing questions they will ask the partner during the demo
 - Process for evaluating the demo
 - Scoring methodology
- CAM/SE to review the Master Security or Unified Communications Specialization demo checklist that contains the customer case study with the partner.
- CAM/SE to guide partner through preparation of a board-level demonstration that incorporates the required criteria defined the Master Security or Unified Communications Specialization demo checklist. 'Customer CXO' will ask probing questions during presentation to validate partner's understanding of the customer problem and Cisco solution partner is recommending.
- The demonstration should take no longer than 1.5 to 2 hours.

Partner Demonstration Preparation

- Partner: The demo should be staffed the way the partner would staff a demo to a customer.
- Partner: Engage a "coach" or advisor prior to the onsite demo audit; this may include Cisco resources. During the audit, the partner may not solicit any guidance from outside their own practice team.
- If the partner cannot complete the demo due to technical issues, another audit appointment will need to be scheduled at the partner's own expense.

Auditor Demonstration Preparation

- Auditor to contact Cisco SME prior to audit to discuss the demo evaluation process.
- Auditor should contact the partner to ensure that the context of the demo is understood.

Lab Requirement

Cisco requires evidence to verify the partner's ability to perform a sophisticated demo based on a specific list of solution criteria:

- Demos may be performed using any lab equipment, including a remote lab or a leased lab
- Exception: Demos may not be performed at Cisco facilities or using Cisco owned equipment

Demonstration Success Criteria

The demo will be evaluated by the Cisco SME and auditor. Partners must present the demonstration in the context of a business case that meets their customers' corporate objectives and covers strategic rationale, available alternatives, and financial justification.

Important Note:

- 80% of the demo should be spent on articulating the business rationale
- 20% of the demo should be spent on the physical demonstration
- At least 3 minutes but no more than 5 minutes should be spent on each solution

Partner will be measured on their ability to:

- Describe the major components of Cisco Unified Communications solutions and clearly articulate their importance for customers
- Identify the issues on the CFO's and CEO's agenda (business issues, finance, long-term goals) in the current climate and the implications for investment and funding decisions
- Map the customer requirements to the appropriate Cisco Security and/or Unified Communications solutions and position the business and technical benefits
- Describe the major components of Cisco's technology solutions and clearly articulate their importance for customers
- Articulate Cisco's value proposition
- Position Cisco products, solutions, and services against competition in order to emphasize overall solution value (e.g., cost of ownership, and differentiators in terms of features, functions, and ROI)
- Position demo to appeal to both the technical and business decision makers
- Articulate non-financial benefits such as:
 - Improving customer performance and satisfaction metrics
 - Strengthening the partner's competitive positioning of products
 - Strengthening the partner's relationships with suppliers
 - Supporting strategic growth initiatives of the customer
 - Enhancing perception of customer in the eyes of the marketplace

Evaluation of the Demonstration

The demo will be conducted early on the day of the audit so that if there are any open action items, the partner can close them before the end of the day.

- The auditor and the Cisco SME will play the part of the customer CXO.
- The 'CXOs' will ask probing questions during the presentation to validate partner's understanding of the customer problem, Cisco solution, etc.
- The Cisco SME and auditor will track the partner's performance to the requirements using the demo checklist. The Cisco SMEs and auditors will use their experience and judgment to evaluate the partner's demo. If any portions of the demo are unclear, the auditor should engage a technical SME to explain how the partner's demo meets (or does not meet) the minimum requirements. The partner may be asked to explain how or when they addressed an item in the checklist if it is not apparent. The auditor must be convinced that partner's demo has met all requirements.
- The auditor and SME will confer on findings and complete the scoring.
- The auditor will report back to the partner.
- The CAM/SE will facilitate closure of any open action items.

To view the Master Unified Communications Specialization demo checklist, go to: http://www.cisco.com/web/partners/downloads/partner/WWChannels/technology/ipc/master_uc_demo_checklist.pdf

To view the Master Security Specialization demo checklist, go to: http://www.cisco.com/web/partners/downloads/partner/WWChannels/technology/security/master_demo_checklist_security.pdf

Operate Phase

Elements of the Cisco Lifecycle Services Operate Phase are addressed in the Service Support and Service Delivery sections of the requirements document.

Exceptions to Operate Phase Requirements:

- If partner has current certification to ISO 20000-1 (or BS 15000-1), the partner is considered to be compliant with the Cisco Lifecycle Services Operate Phase capabilities. The Operate Phase Audit will be waived except to validate that the following service metrics are achieved:

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- Mean Time to Notify (MTTN), Incident Management: 15 minutes – Unified Communications
 - Mean Time to Notify (MTTN), Incident Management: 60 minutes – Security
 - Mean Time to Repair (MTTR), Incident Management: 4 hours
 - Onsite Troubleshooting Response Time: 4 hours

Refer to the Tables for Service Support and Service Delivery in the Cisco Offer-Based Channel Model Audit and Policies Document to identify which sections are waived if the partner has current registration to ISO 20000.

Note: Cisco **does not** allow Cisco Remote Operations Services as an option to meet the Master Specialization Operate Phase requirements. The Operate Phase requirements measure the partner's ability to successfully deliver "Day 2" remote monitoring support to their customers. Today, partners can resell Cisco Remote Operate Services through a Cisco Brand Reseller agreement. While the Remote Operate Services cover approximately 90% of the Operate Phase requirements, the partner simply resells those services to the customer. For this reason, partners that resell Cisco Remote Operate Services cannot use this to help meet the Master Specialization requirements.

Note: A partner that resells Cisco Remote Operate Services may still qualify for Master Specialization if the partner also meets the Operate Phase requirements with their own infrastructure and resources.

Hiring and Training

Partners that do not hold a Gold or Silver Certification: Review of organizational charts, training records, etc.

3. Audit Closing Meeting

At the audit closing session, the auditor will present a brief synopsis of the partner's audit opportunities for improvement and will highlight any open action items. During and after the audit, neither the auditor nor the Cisco CAM can make commitments regarding the qualification decision.

Section III: Post-Audit Review and Reporting

1. Post-Audit: Closure of Action Items

For open action items, the partner will be given an opportunity to provide written evidence of closure to the auditor within five business days after completion of audit.

If unable to close out open action items within five business days, the partner should provide a corrective action plan to the Cisco Partner Program manager. The action plan must be fully implemented within an agreed-upon time period, not to exceed the stated get-well period. At the end of the agreed time period, a visit by the auditor, Cisco partner support representative, or local Cisco SE may be required in order to verify closure of an action item. The final decision will not be made until the corrective action plan is satisfactorily completed.

During and after the audit, neither the auditor nor the Cisco CAM can make commitments regarding the qualification decision. The Cisco program manager will review the audit report and communicate results back to the partner within 20 business days. Results will be e-mailed back to the primary contact within the partner organization. It is possible that the findings of the audit are such that qualification or re-qualification for Master Specialization cannot be achieved within the stated get-well period. In this case, the Cisco program manager may deny qualification. If a partner fails to deliver an action plan within the agreed timeframe, the partner may also be denied qualification for Master Specialization.

2. Master Specialization Approval Process

- Approval e-mail from Cisco governance team to partner and account team
- Partner and CAM will receive a congratulatory e-mail from CSApp. Partner will confirm mailing address to receive complimentary welcome kit.
- Partner/CAM: Go to marketing Website
 - Partner: Complete press release template and issue press release
 - Partner: Complete the Master Specialization Profile, which will be posted on the dedicated Master Specialization Website
 - Partner: Submit 1-2 case studies for posting to the Master Specialization Website
 - CAM: With partner, review the Master Specialization marketing plan and suite of co-marketing materials that are available for partners to market their brand/value.

3. Renewal Guidelines

First-Year Renewal Policy:

- All pre-requisite criteria must be satisfied.
- Certain previously applied qualifications may be re-applied (i.e., Advanced Unified Communications Specialization, CCIE, PMP, customer references), as long as they are still valid.
- New customer references are required. The customer references may include new deployments for previous customers.
- No onsite audit will be required once pre-audit requirements have been satisfied.

Section IV: Marketing Resources and Tools

1. Resources

Master Specializations are supported with a wealth of tools, marketing programs, and materials to help partners take advantage of the Cisco Master Specialized Brand to promote their offer or service. Cisco Worldwide Channel Marketing will continue to promote the value of Master Specialization to three main audiences—Cisco sales, customers, and partners—as follows:

- Cisco sales: Promote the value of Master Specialized Partners to the Cisco sales organization through internal training and promotion.
- Partners: Enable Master Specialized Partners to promote themselves using a suite of co-marketing materials designed to accelerate marketing efforts (e.g., customer brochures, e-mail templates, presentations, artwork/branding, Web banners, and partner messaging).
- Customers: Spotlight individual Master Specialized Partners on the Resale Channel Program Overview pages that support the Cisco Partner Locator. These customer-facing pages are a great way for Master Specialized Partners to promote themselves using the partner profile template.
- Customers: Promote the value of the Master Specialized brand to customers through product and solution launches, Cisco Webpages, Cisco events, and press announcements.

Following is a list of assets available to assist partner marketing efforts.

TOOL/PROGRAM NAME	DESCRIPTION	URL
Market Cisco Technologies	This step-by-step process is designed to help simplify your organization's marketing planning and execution. Templates include: <ul style="list-style-type: none">▪ Identify Objectives▪ Define Proposition▪ Develop Strategy▪ Execute Campaign▪ Measure Results	http://www.cisco.com/web/partners/market/index.html
Channel Marketing Destination	Create demand, build your brand, plan activities, and create detailed marketing plans. All the resources you need are here in one dynamic location tailored to your business model.	http://www.cisco.com/web/partners/market/channel_marketing_destination_map.html
Partner Logos	Logos for Cisco Certified Partners, Master Specialized Partners, Registered Partners, and Authorized Distributors were created to reflect the role these partners play in enabling networking solutions.	http://www.cisco.com/web/partners/market/partner-marks.html

Partner Enablement	<p>Partner Enablement provides a structured, repeatable approach to help channel partners more effectively sell, deliver, and support Cisco solutions.</p> <p>Partner Enablement tools and resources include:</p> <ul style="list-style-type: none"> ▪ Campaign Builder ▪ Competitive Edge Portal ▪ Customized Partner Intelligence ▪ Presentation Builder ▪ Quick Start ▪ Sales Accelerator ▪ Secure Business Advisor ▪ Smart Business Roadmap 	http://www.cisco.com/web/partners/sell/enablement/index.html
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HELPFUL URLs	
Channel Partner Program	http://www.cisco.com/go/partnerprogram
Resale Channel Program	http://www.cisco.com/web/partners/pr11/resale_program.html
Specializations	http://www.cisco.com/web/partners/program/specializations/index.html
Master Unified Communications Specialization Overview	http://www.cisco.com/web/partners/program/specializations/ucom/master/index.html
Master Unified Communications Specialization Resources	http://www.cisco.com/web/partners/program/specializations/ucom/master/resources.html
Master Security Specialization Overview	http://www.cisco.com/web/partners/program/specializations/security/master/index.html
Master Security Specialization Resources	http://www.cisco.com/web/partners/program/specializations/security/master/resources.html
Channel Partner Incentive Program	http://www.cisco.com/web/partners/pr11/incentive/index.html
Channel Partner Audit Program	http://www.cisco.com/go/audit
Partner Locator	http://tools.cisco.com/WWChannels/LOCATR/openBasicSearch.do
Partner Locator (Master Profiles)	http://www.cisco.com/web/partners/tools/partnerlocator/master_spec.html
Partner Locator (Master Profile Templates)	<p>Master Security Specialization Resources and Downloads: http://www.cisco.com/web/partners/program/specializations/security/master/resources.html</p> <p>Master Unified Communications Specialization Resources and Downloads: http://www.cisco.com/web/partners/program/specializations/ucom/master/resources.html</p>



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Printed in the U.S.