



Customer Experience Specialization

November 2021



Why Customer Experience?

- Digitization has empowered customers to look for short-term subscriptions
- Customers are looking for a business value out of the technology solutions delivered to them
- Customers are looking to successfully adopt the solution in order to use it effectively to solve their business challenges

Customer Success is when your customers achieve Business Outcomes through their interactions (Customer Experience practice) with your company in a personalized manner

Customer Experience Benefits

Partners who invest are reporting...



Customer Experience: The Key Brand Differentiator



The cost to get new customers is 5x more than the cost to retain them, which makes customer experience a must

(Forbes)



Customer experience will become the TOP brand differentiator

(Walker Information)

~ 25%

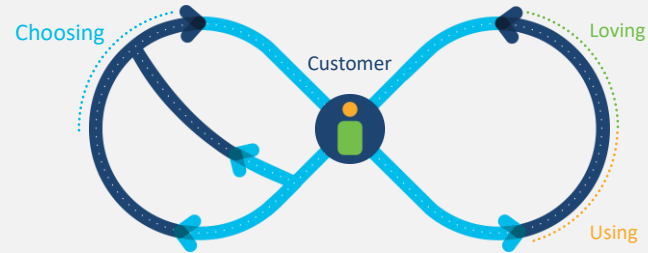
Increase in profitability when partners improve retention rates >5%

(Bain & Co.)
(BCG)

Opportunity Throughout the Lifecycle

Customers are increasingly moving to Software as a Service (SaaS) and recurring offers to enable their digital transformation. These offers hold tremendous value for customers, because you don't need the same up-front investment typical hardware-led solutions require. That means customers can accelerate innovation, reduce risk, and achieve better business outcomes faster.

It also means customers are more likely to abandon a vendor if their business outcomes are not realized. This makes a focus on customer experience critical to succeeding in a SaaS/recurring revenue world. It also presents tremendous opportunity for us to help customers achieve their business outcomes together, by delivering value-added services after the initial purchase.



Why Invest in a Customer Success Practice?

- Increase customer loyalty/stickiness
- Offer your own high-margin professional services
- Differentiate with new lifecycle offers
- Increase incremental revenue with cross-sell/upsell opportunities
- Improve renewal rates & revenue predictability
- Earn incentives throughout the lifecycle

Customer Experience Specialization

To take full advantage of the software, SaaS, and services opportunity, deep technical expertise is absolutely critical. You already have that covered with our architecture specializations. To truly thrive, you also need a strong focus on customer success and lifecycle-first approach to sales. That may mean shifting your current business model and/or developing new capabilities.

The new Customer Experience Specialization is designed with that in mind. Our goal was simple: to help you develop a customer success practice with the right people, tools, processes, and infrastructure to best support your customers throughout the lifecycle.

Open to all Cisco registered partners

Get specialization details



Architecture Specializations

Deep Technical Expertise

- Networking
- Collaboration
- Security
- Data Center
- Service Provider Technology

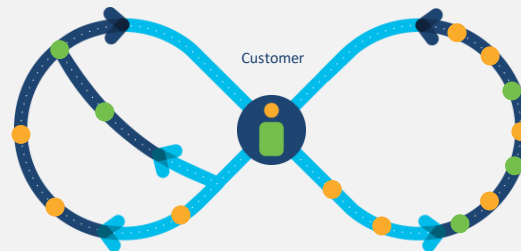


Business Practice Specializations

Focused on Practice Capabilities

- Customer Experience Specialization
- DevNet Specialization

New



Customer Experience Specialization Framework



Practice Development

- Start with the [Customer Success Journey Map](#) or [Foundations of Customer Success eBook](#) for blueprints on developing a practice
- Streamline renewals and automate customer engagement with [Lifecycle Advantage](#)
- Explore [SuccessHub](#) for the latest practice enablement resources

Explore enablement resources



Career Certifications and Training

- Access the latest [training and certifications information](#)
- Explore [Customer Experience Black Belt learning maps](#) for more information about customer success roles
- Register for the [Cisco Customer Success Manager certification](#) or [Renewals Manager exam](#)

Get the latest training



Access to Lifecycle Incentives

- Get rewarded throughout the lifecycle for driving use, adoption, expansion, and renewals of software and services
- Specialization is required to qualify for access to Adopt and Expand [Lifecycle incentives](#)

Get details about the incentives

Elements of the Specialization

Business specialization to recognize partners with demonstrated customer success capabilities and business practices

Customer Experience Specialization



People



Process



Tools



Validation

2 levels

Customer Experience
Specialization

Advanced Customer
Experience
Specialization



Eligibility

Open to all Cisco
Registered
Partners that
meet eligibility
requirements

Available now

Specialization Requirements - Validation

People and Organization



Process



Tools



Eligibility and Validation



Customer Experience Specialization

- 2 Cisco Certified Customer Success Managers (CSMs)
- 1 Renewal Manager (Exam)
- 1 Executive Sponsor

- Customer Success methodology
- Renewal management process
- Customer Success metrics and business review

- Tools with some automation including customer monitoring, profiling and % usage/adoption of product

- Open: Any Cisco partner
- Application questionnaire
- Resource validation
- 2 Customer references



Advanced Customer Experience Specialization

- 3 Cisco Certified CSMs
- 1 Renewal Manager (Exam)
- 1 Customer Success Practice Leader
- 1 Executive Sponsor

- Customer Success methodology
- Documented formal renewal management process
- Documented formal hand-off process between functions
- Customer Success metrics and business review

- Tools with full automation including custom triggers, upsell opportunities, churn risk and health scores
- Renewal management

- Open: Any Cisco partner
- WebEx Partner Capability Review (3rd Party)
- Resource validation
- 2 Customer references

Customer Experience Specialization Differences

Customer Success Practice Attributes



Customer Experience Specialization

- Requires CSMs, RM and Executive sponsor
- Provides company overview and demonstrates a Customer Success business plan built on the LAER model which includes key financials, compensation and method of identifying target customers
- Articulates which tools and platforms partner uses to track customer data, KPIs, and metrics throughout the stages defined on the customer lifecycle



Advanced Customer Experience Specialization

- Requires additional CSMs and a dedicated practice lead
- Partner demonstrates more detailed processes including role hand off, documented examples of CS process and evidence of achieved outcomes
- Has customer success tool to create and manage customer health score, utilization, continuous monitoring, and renewals. Uses customer data to create offers and make recommendations to meet customer needs

Role Requirements

Each role must be fulfilled by a unique individual. No role sharing permitted within a specialization or with roles in the other Cisco Specializations.

Customer Success Manager



Owns Customer Success

Accountable for customer success
Ensures customers maximize the value of their technology investments throughout their complete lifecycle

Renewals Manager



Owns Renewal Opportunities

Owns renewals opportunities
Manages recurring revenue risk assessment and drives renewal execution

Executive Sponsor



Owns Budget & Accountability

Responsible for alignment to senior leadership
Full budgetary accountability
Responsible for strategy and creating accountability for execution

Customer Success Practice Lead



Owns Strategy & Development

Senior leader of Customer Success team
Supports practice development and growth
Sets strategy for Customer Success practice
Manages escalations

Required for Customer Experience Specialization



Required for Advanced Customer Experience Specialization



Individual Certification (+Proctored Exam)





Verification Exam (Not Proctored)



Critical Tool Capabilities Snapshot

Tools should include scalable* intelligent elements helping to maintain consistent, recurrent, and systematic view of customer profiles, plans and projections

 Recommended tool elements	 Description	<p>You may choose from a variety of readily available industry tools to ensure you have the right capabilities.</p> <p>Or you can build your own or use one of our tools—it doesn't matter, as long as required elements are present.</p>
Playbooks	Engage customers throughout the lifecycle	
Customer Profiles	Build or identify customer profiles	
Customer Monitoring	Capture customer data, history, and feedback including survey results, invoice history, marketing engagement, and/or team interactions	
Upsell Opportunities and Churn Risk	Predict future customer growth or red flags based on data related to interactions, payments, inquiries, and more	
Custom Triggers	Configurable alerts and notification: Low Score Survey, Time exceeded to response/deliver, past due task (e.g. invoicing)	
Product Engagement	Rate of active users/products vs total available licenses/devices	
Customer Health Scores	Provide feedback and customer success scores based on the analysis of historical data	

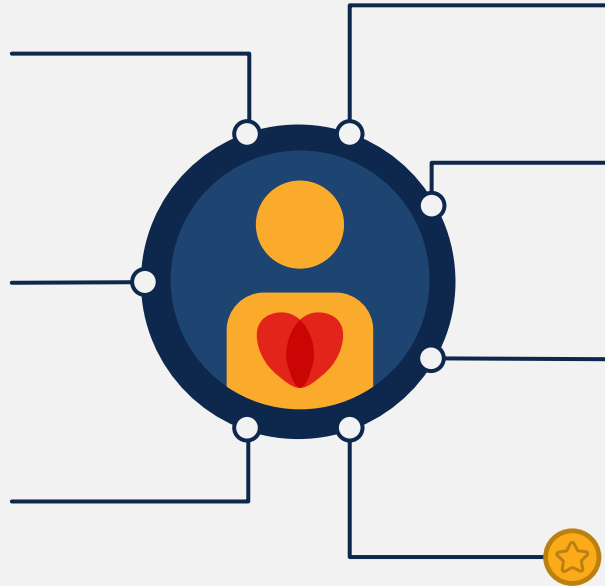
* Scale, according to size of company and method of customer adoption or engagement

Customer Experience Specialization Benefits

[Lifecycle Incentives](#) back-end rebate from delivering use (activation), adopt and expand with your customers

Up to 3% [back-end rebates](#) on selling Business Critical Services (BCS 3.0)

Up to 16%* [additional services back-end rebate](#) on selling CX Success Track offers



Specialization [Logo and Endorsement](#)

Specialization featured in the Partner's profile on [Partner Locator](#)

Customer Success Manager certified roles count towards Gold Integrator certified individual requirement

Specialization counts towards Select, Premier and Gold Integrator Certification

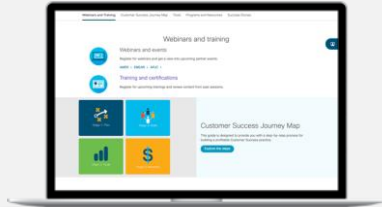


Application and Onboarding Process

Start with Success Hub resources, then apply through Program Management and Application (PMA)

1

Start with Success Hub



Explore Enablement Resources

- Start with the [Customer Success Journey Map](#) or Foundations of Customer Success eBook for blueprints on developing a practice
- Explore [SuccessHub](#) for access to training and enablement

2

Complete Training



Get Your Team Certified

- Access the latest [training and certifications information](#)
- Register for the [Cisco Customer Success Manager certification](#) or [Renewals Manager exam](#)

3

Apply via PMA

Apply for Customer Experience Specialization

- Confirm that you meet role requirements
- Apply via [PMA](#)
- Complete questionnaire and resource validation
- Submit 2 customer references

OR

Apply for Advanced Customer Experience Specialization

- Confirm that you meet role requirements
- Apply via [PMA](#)
- Schedule & complete 3rd party Capability Review* (NSF)

*Note: there is a cost; partner-paid

4

Continue onboarding via Partner Central



Complete Onboarding

- Explore available resources on the [Customer Experience Specialization page](#), for details about requirements to access to incentives and training
- Bookmark the page and check back regularly for updates

Earn Lifecycle Incentives

Get rewarded throughout the lifecycle with the new Lifecycle Incentives program. You have an opportunity to earn incentives for successfully driving software activation and adoption, and for expanding existing deals into new opportunities. Incentives include:



Use (Activate) Incentive

- Earn rebates for activating and scaling software in a production network
- Proof of Performance based on software submitted via Proof of Performance (POP) process or through telemetry
- Fixed incentive and quarterly payments for predictability



Adopt Incentive

- Continue earning rewards for driving adoption success
- Earn higher incentives based on your investment and performance
- Eligibility requirements include Customer Experience Specialization or Advanced Customer Experience Specialization PLUS Advanced architecture specializations



Expand Incentive

- Get rewarded for expanding software bookings that result from your adoption success
- Tiered model rewards you for higher investment and better performance
- Eligibility requirements include Customer Experience Specialization or Advanced Customer Experience Specialization PLUS Advanced architecture specializations

[Get details about the incentives](#)

Ready to Get Started?

Use the following checklists to get started on your customer success journey.

Document Your Plan

We recommend that you work with your Cisco field sales representatives to:



Determine which specialization level is the best fit for your business



Review the enablement recommendations with your PAM and prioritize next steps



Use the people/role requirements and process considerations checklists to get started

Checklist: People/Role Requirements

Complete Required Individual Certifications and Exams

Before you apply for the specialization, make sure your Customer Success Managers complete the individual career certification training and Renewals Managers pass the required exam.



Get details about the [new Customer Success Manager certification](#)



Register for a [Customer Success Manager instructor-led training](#)



Register for the [Renewals Manager verification exam](#)

Additional Roles

You will also need to fill the roles of Executive Sponsor, and Customer Success Practice Lead (advanced-level specialization only).



Identify the right people for each role



Hire new talent if necessary



Provide access to relevant training and resources

Looking for more guidance about building your customer success team? Download the [Foundations for Customer Success eBook](#).

Checklist: Process Considerations

Process Considerations

You will need to demonstrate that your processes meet the specialization requirements when you apply. Here are some things to think about:



Does the LAER methodology include customer success and renewal management methodologies?



Identify any gaps in your existing processes based on the new requirements

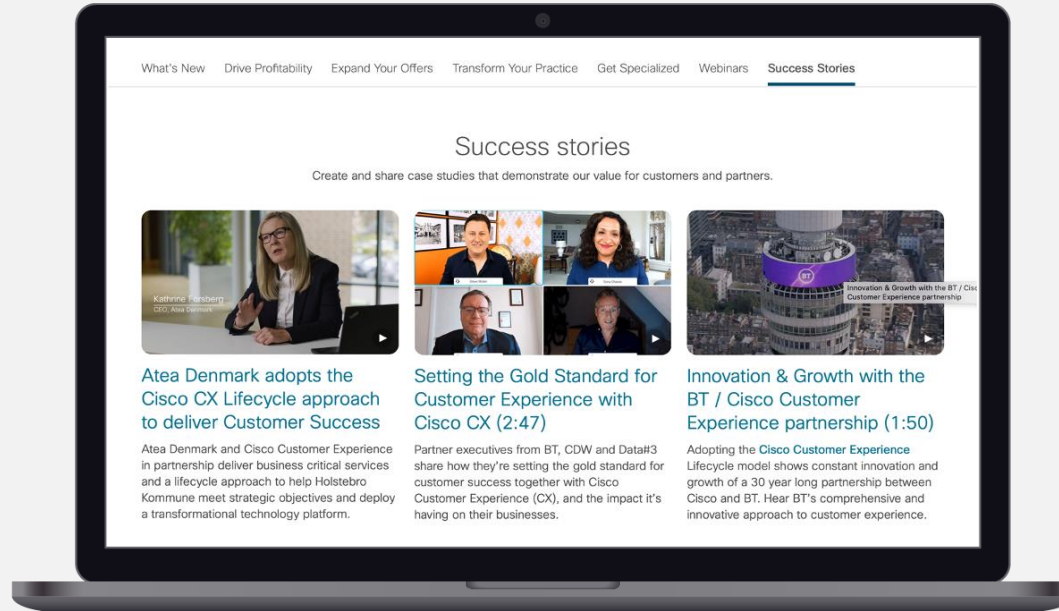


Compare current tools to the new requirements and identify any potential tool-related gaps



Work with your PAM to build a plan for addressing identified gaps

Customer Experience Success Stories



Read the success stories

