Customer Satisfaction (CSAT) Best Practices
Agenda

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

www.cisco.com/go/pal
Sending/Scheduling
Schedule Survey Requests:
Click Send Surveys
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.

PAL Announcement:
The FY 2008 Cisco Systems, Inc. Global Customer Satisfaction Survey is Now Closed
The FY08 Cisco Customer Satisfaction Survey (CSAT) is now closed. You will no longer be able to access Partner Access Online (PAL) to send out further invitations, nor will any responses for any outstanding survey invitations be captured. Please note that as of Friday, August 1 the PAL Web site will be open as of 9 a.m. PDT and CSAT for FY09 begins. Remember that this is a good time to reserve customer names early.

View Results for Certification Year

Click Here for additional information about this page.
Entering a Customer Contact

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
For existing customer contacts, 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 once every 12 months), 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 Certification Year Screen in PAL?

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

View Results for Certification Year: Click this link to see partner survey results within the *partner’s Certification year* (prior 12 months leading to partner’s recertification date).

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<th>Quick View - Ciscos CONVERGENCE(CANADA)</th>
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<td>Total Responses</td>
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Data Valid as of 05-Aug-2008
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

- Do you wish to evaluate this partner? = YES

- 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

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

  AND/OR

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

  and

- 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?

- 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
- 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
  AND/OR
- 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
- 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 Eligible Surveys and Overall CSAT Measurement?

- **VIP Valid Survey:**
  Customer contacts must answer:
  
  The *survey questions to be considered as PAL valid survey* (previous two slides)
  
  and

  What are the primary technologies (partner selected) delivered to you?
  = VIP TECHNOLOGIES (UC, Wireless, Security, Data Centre)

In addition,

Partner is enrolled in VIP

and

Surveys are *Partner sourced* only
Q. I sent a survey to my end customer…but they said they did not receive it. Why?

- Anti-spam filtering software on their email systems.
- Resolution: open a GSTS case with:
  - Your Company Name
  - Your Country
  - The email addresses of those contacts not receiving the surveys
- Re-send will be scheduled: please alert your customer to watch for the email from Walker.
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 prior to other partners, Cisco direct sales, or the system’s mass secondary send to those 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 a response is entered after 6:00 PM (Pacific Time), it will be updated in PAL within 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.

- Reason #2 – The end customer opened the survey, and answered “NO” to the key questions
  With a “NO” response, the end customer is never presented with the pre- or post- sales partner questions.
Best Practices
Pre-Select your VIP Technology
Prior to Sending Survey

• To ensure the VIP-related question is responded to correctly, partners can pre-select technologies for each end customer.

• Hold the Shift key to select multiple technologies, or Ctrl-Shift if the technologies are not adjacent in the list.

• End-customers can retain the partner’s selection or de-select/choose others.

• The partner can select technologies when resending by editing the request.
Customer Awareness & Best Practices

- Be strategic when selecting customer contacts to survey to minimize the number of surveys you send in a year.
- Send the survey after a successful Cisco solution deployment with your customer.
- 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.
- 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.
- 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
Premier Partner with Annual Renewal in March, participating in VIP

Certifications
- Reserve Customers for CSAT

Incentives
- Complete sending Surveys - VIP

Admin
- 30 Days to Anniversary Complete Sending Surveys
- Premier Anniversary
- Complete by end of June
- Check survey submissions approaching end of year Complete by end of June
- Survey Tool Closed for Annual Update