

Version 1.0

Cisco Partner Field Guide

Leading Practices for Partner Profitability

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Section 1 Introduction



Chapter 1.1



About This Guide

This guide is designed to provide leading practices, key performance indicators, and a roadmap to establish successful business growth for all Cisco partners. By reading this guide and following the guidelines, you will be well positioned to build your business with greater profitability and customer satisfaction. In addition, you will know how to locate the Cisco tools, templates, and programs available to help you achieve your business growth goals.

What Does This Guide Mean to Me?

This guide is a reference to the standards that have made Cisco partners the best in the industry. By using the leading practices, tools, and other reference materials highlighted in this guide, you will be executing tried and true methods for growing your business and becoming a leading Cisco partner.

How This Guide Is Organized

The Cisco Partner Field Guide is divided into four sections.

Section One explains how to use the guide.

Section Two describes four Cisco partner profiles — Emerging Services Partner, Acceleration Partner, Optimization Partner, and Transformation Partner — and provides an assessment you can take to determine your partner profile. Knowing your partner profile will help you gain the most from the guidelines and tips offered for each category.

Section Three describes the Business Fundamentals, Operational Excellence, and Customer Value leading practices and key performance indicators for successful Cisco / partner relationships, marketing, sales, services delivery, and support services. Each chapter describes the components for success, offers tips related to a partner profile, and tells how to access Cisco programs, tools, and templates that will help you apply these leading practices to reach your business goals.

Section Four provides a glossary of terms, a bibliography, and additional reference links.

How to Use This Guide

To gain the maximum benefit from this guide, follow these steps:

Step 1:

Read the profiles in Chapter 2.1

to understand the characteristics of each partner profile.

Step 2:

Take the assessment in Chapter 2.2

to determine which profile fits your business profile.

Step 3:

Follow the key components and performance indicator guidelines in Section 3

Step 4:

Note any Tips that relate specifically to your partner profile.

Look for your partner profile callout for tips that specifically relate to you and your business.

Step 5:

Use the Cisco tools and templates

to apply the leading practices to your business.

Step 6:

Use the How am I doing checklist

at the end of each chapter to guide your progress.

Step 7:

Use this guide

to build your business and enhance your relationship with Cisco as a strategic partner.

Section 2 Determine Your Partner Profile

Chapter 2.1



Four Partner Profiles

There are many different types of Cisco programs and partners. In order to maximize the use of this guide, the table in this section highlights four distinct Cisco partner profiles. Review the profiles outlined in the table, then use the assessment in Chapter 2.2 to determine which category best matches your current business and technical readiness.

Partner Profile	Description
Emerging Services Partner	<p>Equipment reseller with new Cisco service practice or new to services altogether</p> <p>Historically focused on Cisco equipment resale</p> <p>Implementation & Support Services more than 20 percent of total revenue</p> <p>Desires to create services capabilities</p>
Acceleration Partner	<p>Solutions-focused Cisco partner who is moving from good to great execution</p> <p>Skills first, process second—need to move beyond competency to capacity and consistency</p> <p>Good percentage of total business in services, but margin and profitability may not be optimized</p> <p>Desires to develop a structured and profitable services practice</p>
Optimization Partner	<p>Established Cisco partner who is moving from great to excellent execution of Cisco solutions</p> <p>Portfolio and technology expansion (solutions and business level selling / offerings)</p> <p>Mature services model moving from standardized to optimized delivery</p>
Transformation Partner	<p>New Cisco partner transitioning/transforming services business from other vertical, manufacturer, or offerings</p> <p>Possibly a product-focused model in another manufacturer line transitioning to Cisco solutions</p> <p>Focus on positioning specific industry or horizontal expertise in telephony, networking, or security</p>

Why Four Profiles?

There are many models that partners follow in the delivery of professional services. By identifying profiles that align certain aspects of consistency or similarity, Cisco is better able to call out specific metrics, attributes, or leading practices that apply to that partner profile.

For example, a new services-based company requires introductory information and content that will help it get started. As the company becomes more adept at selling and implementing solutions, it will require more advanced information and different content. At the other extreme, a partner that has been successfully selling and implementing Cisco solutions for many years would require still different information and content.

However, these are very general categorizations. You may find information and content that applies to your business located in a completely different profile. Therefore, you should feel free to use and apply all the information you find applicable to your company needs.

The following chapter provides a simple process for determining which partner profile best aligns with your organization.

Chapter 2.2



Partner Profile Assessment

Use this chapter to assess your partner profile as a way to gain the maximum benefit from the Cisco Partner Field Guide.

Which Partner Profile Fits Your Business Profile?

Answer the following questions to establish which profile best matches your business.

Emerging Services Partner: Our Company	Yes	No
Sells Cisco core or Unified Communications hardware, software, support, and maintenance contracts		
Typically provides no or limited basic installation and configuration services		
Does not develop and does not sell any third-party (non-Cisco) applications		
Uses product catalogs, web presence, and inside-sales organization to sell to the customers' IT or purchasing departments		
Engages primarily in a price-driven relationship with customers IT and purchasing departments—sales cycles are short		
Desires to develop and grow a profitable services business to accompany its Cisco product business		
Acceleration Partner: Our Company	Yes	No
Sells Cisco core and Unified Communications hardware, software, support, and maintenance contracts		
Provides design, installation/integration, project management, on-site and call-center based support services and other consultative services		
Focuses on client business needs, not just product fulfillment		
Delivers basic installation and configuration services of Cisco products		
Does not currently engage in complex or large project design and implementation services		
Desires to standardize and operationalize service offerings and create greater value for customers		

If you answer yes to most of the questions for a specific profile, you should pay particular attention to items highlighted in the guide for that partner profile. If you find that you have qualities in more than one profile, look for tips that relate to those areas as well.

By reviewing and aligning with all the information in this guide, you will find insight and tools to help you grow your business, whatever partner profile you are.

Optimization Partner: Our Company	Yes	No
Sells Cisco core and Unified Communications hardware, software, support, and maintenance contracts		
Provides professional services including design, PM, integration, and post-installation support		
Has a strong services base with customers		
Uses outside and inside sales structure and skilled technical professionals to sell, deliver, and support customers' networks		
Delivers a full set of assessment, design, and implementation services		
Maintains a high attach rate for warranty and post-implementation support services		
Desires a strong solution-focused and value-added relationship with customers		
Transformation Partner: Our Company	Yes	No
Is a new Cisco partner with an existing voice or networking customer base		
Is transitioning / transforming its services business from other vertical, manufacturer, or offerings		
Is looking to transform its business into a specialty vertical or solution development partner		
Has a robust services offering that includes assessment, design, implementation, and systems integration		
Is interested in creating alignment with Cisco leading practices and developing a Cisco-focused services practice for customers		

What's Next?

Now that you have identified which partner profile best represents your business, you are ready to use the information in this guide effectively.

Section Three contains information pertaining to the Cisco leading practices, key performance indicators, and tools that have helped build successful Cisco partners for years.

Each chapter is divided into major and minor components with supplemental information, links, and other useful information to help point you to in-depth leading practice material that can provide you with more information on any given topic.

Individual components are broken up into three different categories:

Cisco Business Fundamentals — Leading practices that benefit the services business of all Cisco partners

Developing Operational Excellence — Leading practices that help streamline your operations, improve productivity, and increase your services profitability

Creating Customer Value — Leading practices that accelerate your business and create value in your business, your customer relationships, and your Cisco partnership

You will gain the most benefit from the materials in this guide by using these categories and paying particular attention to any tips or tools that are highlighted for the specific partner profile you defined in Chapter 2.2.

Section 3 Best Practices Guidelines



Chapter 3.1



Guide to Maximizing Cisco / Partner Relationships

This chapter defines the leading practices and key components for developing an ongoing relationship between your company, the Cisco Channel Team and the entire Cisco Sales Team. Leading practices as defined in this chapter, when leveraged, will more consistently maximize the potential of partner relationships.

Key Performance Indicators To Measure The Success Of Your Cisco Relationship

Attributes

You have developed a strong relationship with the channel sales team.

You understand Cisco's business, strategy, and value proposition.

Your key solutions are developed with a focus on Cisco products and services.

You are aware of your regional Cisco team and their roles and responsibilities. This includes the Partner Account Manager, Cisco Account Manager, Channel Account Manager, and Regional Manager.

You have established quarterly goals with your Channel Account Manager.

You provide ongoing sales pipeline information to the local sales team.

You have developed a Joint Selling program with the Cisco account team to establish target accounts and maximize account penetration and solution development.

You create and promote unique service offerings to Channel field staff and customers.

You leverage existing tools and programs to increase your benefits of working with Cisco.

Building Blocks for Successful Cisco / Partner Relationships

Business	Training Certification Programs	22
Fundamentals	Partnership Engagement and Program Development	24
	Team Communication	26
Operational Excellence	Business Review and Goal Setting	28
	Pipeline Reporting and Forecasting	30
Creating Customer Value	Joint Selling and Solution Deveopment	32
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Training and Certification Programs

What is it?

Engage in standard sales and technical certifications to become authorized and competent in the sales and delivery of solutions.

Why is it important?

Certification level directly reflects your understanding, expertise, and skills level across key technologies and ensures your ability to deliver integrated solutions. Ongoing training strengthens your sales and technical skills and reduces the turnover risk for trained employees.

What is the ideal situation?

Partner engages in regular training for sales and technical resources and is therefore always up to date on the current products and programs available. Partner maintains optimum partner program membership level and benefits.

What are the leading practices?

- Create a training path to achieve certification and specialization levels thereby eliminating the risk of poor customer service.
- Ensure training to eliminate loss in profitability if a key resource leaves the company.

Emerging Services Partner

Train all your key sales and presale technical folks as quickly as possible. Check with your distributors and local Channel Account Manager to see what classes are available.

Acceleration Partner

Cross train your pre-sales technical teams on both sales and services classes. Create incentives to encourage your teams to cross-train.

- Ensure that skilled personnel are available to work on complex tasks.
- Build a training plan to ensure that all Account Managers have the technical skills necessary to position, sell, and design Cisco Unified Communications solutions.
- Frequency of knowledge refresh and recertification programs
- Duration and organization of new hire training and orientation
- Percentage of time allocated to training and knowledge development for staff

What are the measurable key performance indicators or skills required?

- Sales personnel trained at the required Cisco certification level.
- Number of certified resources exceeds minimum (both sales and technical)
- Establishment of structured solution development and certification program for sales and technical teams

Optimization Partner

Create a continuing education program to promote ongoing education and development of your staff.

Transformation Partner

Work with your Channel Account Manager to establish which classes will best get your sales and technical staff ramped-up and your certifications current.

Partnership Engagement and Program Development

What is it?

Commit to establishing Cisco as a go-to vendor and to developing key solutions focused on core Cisco products and services.

Why is it important?

Cisco's Channel strategy focuses on support and enhancement of partner profitability. Therefore, in addition to equipping you with products, services, training, and support, becoming a Cisco Certified Partner or Specialized Partner strengthens your relationship with Cisco and its sales organization. This positions you to take advantage of more sales opportunities than ever before.

What is the ideal situation?

Business goals are aligned and focused on Cisco as a strategic vendor who will participate in building business together with you.

What are the leading practices?

- Develop a business plan that is aligned with Cisco.
- For each product line, develop the required content and resources / individuals for successful sales.
- Complete Cisco certification at the proper level to deliver an integrated solution for a designated technology.

Emerging Services Partner

Engage in a planning session with your local Cisco team. They can provide information on how to get your services business started.

Acceleration Partner

Work to establish regular communication with your Channel Account Manager to promote your sales and marketing activities.

- Complete the Cisco specialization program appropriate for the technology you plan to sell.
- Establishment and attainment of key metrics, goals, and program activities

What are the measurable key performance indicators or skills required?

- Completion of required program elements
- Frequency of business review and status meetings
- Performance to goal percentage
- Number of certifications
- Overall business profitability by Cisco led solution

Transformation Partner

Your expertise in networking may be a benefit to existing customers looking for additional value. Check with your Channel Account Manager for opportunities for joint selling.

Team Communication

What is it?

Become aware of your regional Cisco team and their roles and responsibilities in order to optimize, align, and clearly define relationship roles at a local level. This includes the Partner Account Manager, Cisco Account Manager, Channel Account Manager, and Regional Manager.

Why is it important?

When relationships are understood and aligned, the result is an improved relationship, synergy, and satisfaction for partner Account Managers and Channel Account Managers, which leads to increased

likelihood of team success. In addition, research shows that overwhelmingly, leading practices of top teams are driven by the Regional Manager or occurred in regions where the Regional Manager was proactive and encouraged (and managed for) team collaboration.

What is the ideal situation?

Your business is recognized as a leader in the market and the key people in the Cisco sales and channel organization engage your company regularly on customer opportunities.

Emerging Services Partner

Engage in a planning session with your local Cisco team. They can provide information on how to get your services business started.

Acceleration Partner

Develop relationships with key Cisco sales teams for collaboration and territory development. Work to establish regular meetings to discuss growth plans.

What are the leading practices?

- Take part in 360-degree feedback assessment to clearly define relationship roles at a local level.
- Gain access to models, tools, and benchmarks to identify business issues and actions.
- Help the Channel Account Manager help your business by quantifying issues that Cisco needs to resolve.
- Arrive at a Cisco plan that will improve your return on investment (ROI) from selling Cisco.
- Require self-assessment of individual contributions to the team leading to a tailored approach that continually improves and develops team relationships.
- Provide breakout sessions that enable account managers and extended team to brainstorm ways to work together on specific accounts / technologies / initiatives / and verticals. Assign specific actions and responsibilities for each team member.

What are the measurable key performance indicators or skills required?

- Channel Account Manager regularly meets with partner and Cisco Account Managers to assess (1) background/experience, (2) target customer segment/vertical, and (3) unique skill set.
This background helps guide the partner Account Manager to the optimal Cisco Account Manager where success is most likely.
- Frequency of regional team presentations.
- Frequency of joint marketing, selling and solution development activities.
- Establishment of focused liaison to drive relationship and promote wins.

Optimization Partner

Create, track, and measure key performance indicators to show trending in joint programs quarter to quarter. Be prepared to come up with ideas to maximize activities and fix problem areas.

Transformation Partner

Align transformation strategy with Cisco region sales and marketing plans for effective collaboration and team building.

Business Review and Goal Setting

What is it?

Establish quarterly goals with your Channel Account Manager.

Why is it important?

Establishing quarterly goals for your own purposes and with Cisco is critical to deepening relationships with business partners. This helps develop a strong relationship based on a consultative approach and underlying team-based framework.

What is the ideal situation?

The channel account team is aligned with your business goals working with you to build and execute

programs that drive mutual benefit. Partner and Cisco have a better understanding of each others' business, strengths, and specific competencies leading to improved relationships.

What are the leading practices?

- Use a standardized approach to encourage mutual learning, promote joint planning, and establish good relationships.
- Assign roles and expectations, align Cisco and partner interests, and establish a development plan that creates success metrics.

Emerging Services Partner

Present your services business plan to your Account team for feedback.

Acceleration Partner

Build, plan, and execute joint development plans with your regional team. Create performance goals and territory development strategies on a quarterly basis.

- Plan to train, optimize, and develop the required skills to solidify partner and Cisco vision.
- Conduct a biannual partner meeting to gain bidirectional understanding of the Cisco / partner sales goals and approaches, provide technical training and product updates, and develop stronger trust-based relationships.
- Apply team-based planning approach that analyzes organization, utilization, resources, training, engagement, accountability, and metrics.

What are the measurable key performance indicators or skills required?

- Quarterly business reviews are conducted and goals are established.
- Biannual partner meetings are held with Channel team and Executive Management.
- Development Plan is complete; roles and responsibilities assigned with a monthly schedule for recruiting, retention, and training.
- Team-based plan established and operational.

Optimization Partner

Use national and regional events to get to know Cisco Executive Management, share leading practices with partners, and highlight your wins and capabilities outside your region.

Pipeline Reporting and Forecasting

What is it?

Provide ongoing sales pipeline information to your management team and the local Cisco sales team.

Why is it important?

If the leads are well qualified, the sales pipeline can be a company's greatest asset for both closing sales and forecasting for the future. When you work in conjunction with the Cisco sales team, you can be sure you are targeting the right prospects.

Pipeline data can also be used to understand the impact of marketing activity and to estimate the amount of marketing activity required in the future.

High-quality pipeline information is also a valuable input for resource planning – a leading indicator of the need for delivery capacity or of impending revenue and profit problems.

What is the ideal situation?

Sales management and field sales teams from both organizations are working together to identify, quantify, qualify, and close opportunities on each other's behalf. Opportunities are monitored, tracked, and developed resulting in successful sales.

Emerging Services Partner

Create and manage a pipeline report with your own sales staff. Review weekly and monthly.

Acceleration Partner

Create measurable statistics and graph results. Share with your Cisco account team during your regular meeting schedules.

What are the leading practices?

- Develop an Opportunity Qualification process as part of a clearly defined sales process that ensures consistent execution of high-quality pipeline data and efficient use of presales support resources.
 - Using pipeline data, define a sales target goal to determine sales team staffing requirements and encourage the sales effort.
 - Track the correlation by sales person, vertical, or solution between qualified leads and closed sales to define development requirements and improve future forecasting.
- Number of qualified leads per week
 - Number of proposals submitted per week
 - Number of qualified leads converted to wins per month
 - Ratio of wins to new leads per month
 - Ratio of pipeline revenue/profit dollars to forecast revenue/profit dollars

What are the measurable key performance indicators or skills required?

- Pipeline information reported weekly and reviewed bi-weekly with each sales person and monthly with Cisco
- Forecast data reported quarterly and annually
- Number of new leads entering the pipeline per week

Optimization Partner

Maintain regular integrated pipeline forecasting, account development goals, and other key indicators into a real-time tracking system with your Cisco team.

Transformation Partner

Work on statistics that show conversion ratios for new products, services, or target industries. Track the success of initiative and service offerings as you make your transformation.

Joint Selling and Solution Development

What is it?

Develop a joint selling program with the Cisco account team to establish target accounts and maximize account penetration and solution development.

Why is it important?

Cisco is leading, evolving, and investing heavily in the Channel Partner Program. Partners that evolve and lead with Cisco have unprecedented opportunities to grow. With Cisco's Channel Partner Program and a unique solutions portfolio, you can increase your growth, differentiation, and profitability. Having your sales teams

work closely with Cisco sales teams provides your organization with:

- Increased visibility to new opportunities
- Increased customer awareness of your company through joint marketing efforts
- Improved customer perception of your organization through association with Cisco
- Improved sales success through leveraging the knowledge and expertise of the Cisco sales teams

What is the ideal situation?

Cisco and partner engage in on-going account development and

Acceleration Partner

Pick a few target accounts and experiment with joint selling with your Cisco account team.

joint selling activities. Customers perceive value in both their Cisco and partner relationships and see value in the joint effort, thus increasing the number of successful sales of solutions.

What are the leading practices?

- Meet with Cisco account team to quantify and align objectives and timing and develop field sales support for joint selling opportunities and for customer presentations.
- Strengthen your relationship with the Cisco sales organization and market your unique value proposition to create greater sales opportunities through Cisco promotion of partner value to customers.
- Provide incentives to your sales teams to work with the Cisco sales teams and measure joint successes.

What are the measurable key performance indicators or skills required?

- Number of joint account plans created. Deep account plans will

not be likely in the small and medium-sized business area.

- Number of joint customer sales calls completed.
- Number/revenue/profit volume of joint opportunities in the pipeline.
- Number of joint proposals submitted.
- Number of joint wins.
- Ratio of wins to proposals.

Optimization Partner

Engage in detailed territory development plans with your account team. Create “tag-team” selling strategies that maximize the best that you and Cisco can offer to customers.

Transformation Partner

Research vertical and line of business solutions with your Cisco team. Create offerings that differentiate you from other partners in the territory.

Build Solution Focused Business Practices

What is it?

Create and promote unique solution offerings to Channel field staff and customers.

Why is it important?

Research studies funded by Cisco show that partners with a solutions focused practice have a strategic-level (mature) relationship with their customers and tend to have larger and more profitable transactions. More importantly, these companies enjoy higher retention rates with their customers.

This research also demonstrated that a partner with a solutions

focused practice sells to the CIO and other executive business decision makers who are not traditionally associated with a network or telephony purchase within the customer organization. As is the case with Cisco's successful Independent Software Vendors (ISV), this type of partner is viewed as a long-term "strategic partner" or "trusted advisor" by the customer.

What is the ideal situation?

The Channel and field sales teams are aware of your unique solution offerings and think of you first when they identify an opportunity that matches your skill set. Customers

Acceleration Partner

Establish a baseline solution selling methodology and engage in regular training and role playing to make this style second nature.

perceive your organization as providing additional value to them. They will pull you into the discussion of their needs earlier when they discuss the unknowns and are more vulnerable. Your role as a trusted advisor is critical.

What are the leading practices?

- Develop a clear understanding of your customer's and their customer's business needs.
- Create a portfolio of solutions-based offerings that address those needs, clearly demonstrate business value, and can be taken to market.
- Based on your understanding of their business drivers, develop relationships with CXO level customer personnel.
- Enhance technical capabilities to support solution offerings.
- Build a solutions-capable sales and presales team

What are the measurable key performance indicators or skills required?

- Improvement in retention rates, repurchase rates, revenues and margin stacking are demonstrated through the solutions modeling focus.
- Dollar revenue and gross margin per transaction versus dollar per transaction for product sale
- Number of CXO customer contacts
- Solution decision maker profile versus product decision maker profile
- Customer retention rate
- Customer penetration rate
- Amount of repeat and new opportunity business from existing customers
- New solution business from new clients

Transformation Partner

Use your new business approach to validate your message as a leader in your particular market. Incorporate this messaging into your marketing materials and sales engagement model.

Utilize Cisco Field Resources for Sales, Delivery, and Support

What is it?

Leverage existing Cisco resources, tools, and programs to increase your benefits of working with Cisco.

Why is it important?

Cisco offers a variety of resources, tools, templates, services, and programs to help you successfully accomplish sales, delivery, and support services. Besides helping to close more deals, using these tools helps drive global consistency among Cisco and partners, which in turn builds confidence and trust within your customer base.

What is the ideal situation?

Business tools are aligned with Cisco programs, incentives, and support systems. Customer experience transitions smoothly from partner to Cisco as needed to ensure highest level of sales, delivery, and support services. High customer satisfaction, increased sales, improved sales, and delivery services consistency.

What are the leading practices?

- Cisco Lifecycle Services practice building tools and resources are applied for current business assessment; gap analysis; leading practices in sales, services delivery, and implementation.

Emerging Services Partner

Examine the different ways you can engage in Cisco field support. Make sure your staff is trained on what is available and how to access it.

Acceleration Partner

Incorporate key Cisco templates and tools into your internal operational processes.

- Performance is monitored for future growth.
- Tools, templates, and Cisco leading practices are integrated into the DNA of your business.
- Regular review of sales reports and other Cisco provided performance data

What are the measurable key performance indicators or skills required?

- Participation in Cisco Channel Partner Programs
- Utilization of Cisco tools and resources
- Update of profiles and other key statistical data

Optimization Partner

Create a business structure that leverages the Cisco tools, methodologies, and frameworks and aligns them with your own internal processes and methodologies.

Transformation Partner

Transform your business to align with the Cisco leading practices for sales, delivery, and support. Utilize the tools and templates to rapidly integrate into your own infrastructure.

Cisco Resources for Successful Partner Relationships

Channel Partner Program:

The Channel Partner Program has evolved to help you accelerate your growth, differentiate your business, and increase your profitability.

LOCATION: PARTNER CENTRAL > CHANNEL PARTNER PROGRAM

Certification Program:

Three certification levels: Premier, Silver, and Gold (*see Glossary*).

LOCATION: PARTNER CENTRAL > CHANNEL PARTNER PROGRAM > CERTIFIED PARTNER

Specialization Program:

There are three specialization levels: Express, Advanced, and Master. (*see Glossary*).

LOCATION: PARTNER CENTRAL > CHANNEL PARTNER PROGRAM > SPECIALIZED PARTNER

Cisco Account Team/ Account Manager Locator:

Engaging with Cisco in an intelligent, systematic, and sustained manner is critical to maximize success as a Cisco Partner. Know and understand the Cisco Account Teams supporting your efforts. Work with your Channel Account Manager to meet and know the rest of your Cisco Account Team.

LOCATION: PARTNER CENTRAL > CHANNEL PARTNER PROGRAM > MANAGE YOUR PARTNERSHIP TOOLS INDEX > CAM LOCATOR

Career Certifications, Specializations, and Paths:

Cisco offers three levels of general certification representing increasing levels of expertise: Associate, Professional, and Expert.

LOCATION: [TRAINING & EVENTS](#) > [CAREER CERTIFICATION & PATHS](#)

Partner E-Learning Connection:

The Cisco Partner E-Learning Connection, PEC, is the primary training source for all Cisco Partner learning and training.

LOCATION: [PARTNER CENTRAL](#) > [PARTNER LEARNING \(PEC\)](#)

Training from Cisco Learning Partners:

A comprehensive set of training resources, from instructor-led courses to remote access labs and e-learning solutions, are available through authorized Cisco Learning Partners for improving your technology expertise.

LOCATION: [TRAINING & EVENTS](#) > [VIEW ALL TRAINING RESOURCES](#) > [TRAINING FROM CISCO LEARNING PARTNERS](#)

Cisco / Partner Relationship: How Am I Doing?

Use the checklist below to determine your progress toward successful Cisco Partner relations.

Goal	Yes	No	In Progress
Company's overall business plan aligns with Cisco.			
Specialization level is appropriate for sales, technical, and services expertise in Cisco's particular technology focus.			
Certification level is appropriate for technical personnel.			
Assessment feedback is done to clearly define relationship roles at a local level and quantify issues that Cisco needs to resolve.			
Models, tools, and benchmarks are used to identify business issues and actions and improve ROI.			
Regular meetings are held with Channel Account Manager and Cisco Account Manager to assess experience, target customers, and unique skill set.			
Account managers and extended team meet regularly to brainstorm ways to work together on accounts, technologies, and initiatives.			
Skilled personnel are trained and available to work on complex tasks and all Account Managers have the necessary technical skills.			
Quarterly business reviews are conducted and goals are established.			
Biannual partner meetings are held with Channel team and Executive Management.			
Development plan is complete; roles and responsibilities assigned with a monthly schedule for recruiting, retention, and training.			

Goal	Yes	No	In Progress
Team-based plan is established and operational.			
Pipeline metrics are reported weekly and reviewed biweekly with each sales person and monthly with Cisco.			
Pipeline forecast data is reported quarterly and annually.			
Field sales support is developed for joint selling opportunities and for customer presentations.			
Incentives are provided to sales teams to work with the Cisco sales teams and measure joint successes.			
Joint selling opportunities and successes are tracked and reported.			
A portfolio of solutions-based offerings exists that addresses the business needs of customers.			
Technical capabilities are enhanced to support solution offerings; sales and presales team are solutions capable.			
Customer retention rate and penetration rate is tracked for solution sales.			
Solution decision maker profile versus product decision maker profile is understood by all.			
Cisco Lifecycle Services practice building tools and resources are applied for current business assessment; gap analysis; leading practices in sales, service delivery, and implementation.			
Performance is monitored for future growth.			

Chapter 3.2



Guide to Successful Cisco Marketing

This chapter defines the steps and leading practices for developing and aligning with Cisco marketing and customer loyalty leading practices.

Key Performance Indicators To Measure The Success Of Your Marketing

Attributes

Your prospects and customers understand what you do.

Your sales team can articulate your Unique Value Proposition (UVP) clearly to the customer.

Your UVP message is a driving force for new opportunities and customer value.

Customers, prospects, and the Cisco account team are regularly contacted and are aware of new developments, promotions, and other relevant marketing activities.

Leads received from demand generation programs are managed, assigned, and tracked.

Customers are exposed to up-to-date solutions and leading practices on a regular basis through both field and onsite training and demonstrations.

Cisco, customers, and industry magazines see you as a leader in your field.

Successful engagements are captured and used to show expertise and service delivery excellence.

Marketing, sales, and service delivery all work together to establish and document successful deployment solutions.

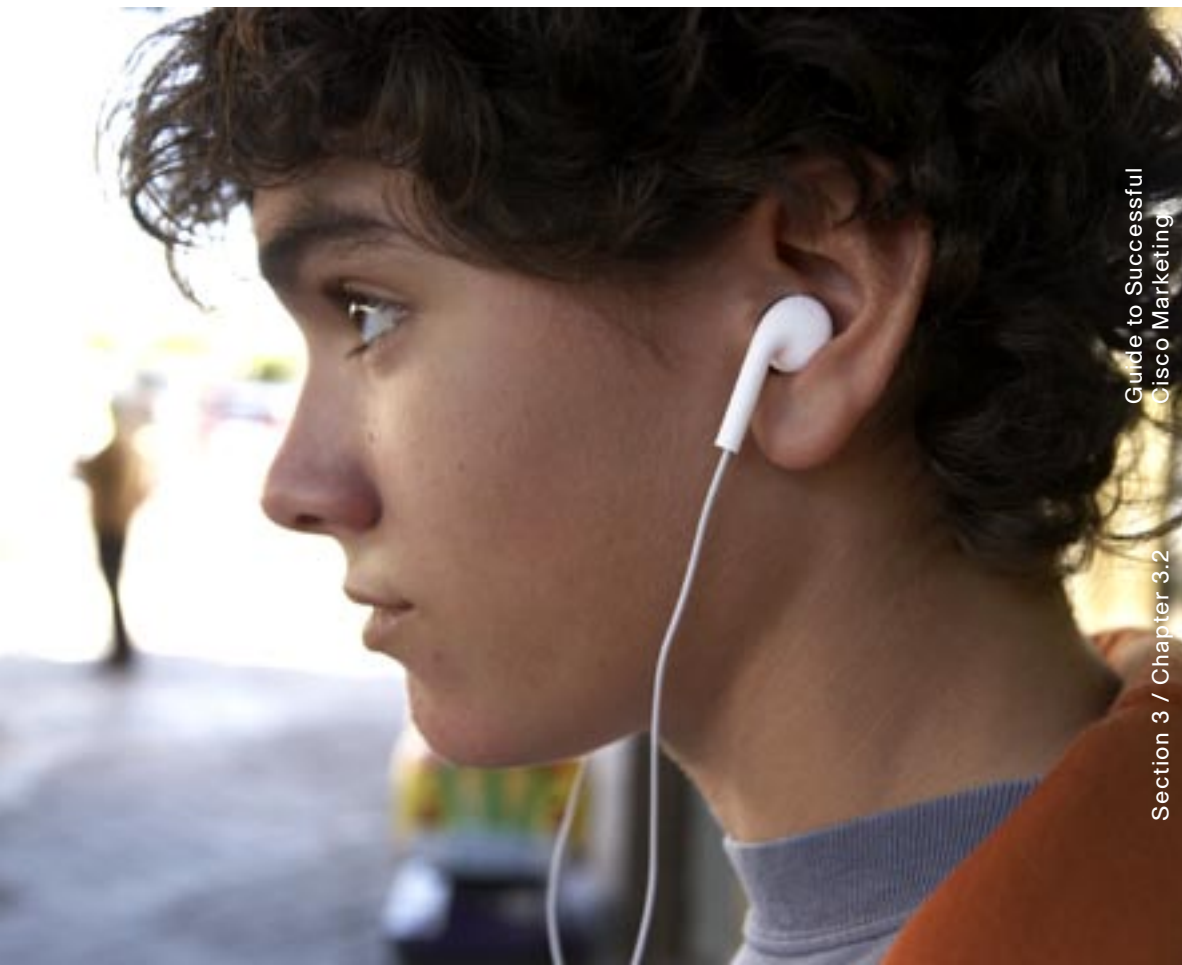
Business managers, sales personnel, and marketing staff are all aware of the strengths and weaknesses of your competitors.

Business and sales messaging is aligned to highlight your strengths.

Your company maintains an ongoing program for demand generation that creates leads and other new business for your sales team.

Building Blocks for Successful Cisco Marketing

Business	Cisco Program and Campaign Alignment	45
Fundamentals	Communication Methods	47
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Operational	Training and Customer Education Events	51
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Customer Value	Unique Value Proposition	59
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Cisco Program and Campaign Alignment

What is it?

Create marketing materials and programs that describe your company and align with Cisco messaging. This includes websites, marketing brochures, direct mail pieces, case studies, and other hard copy or soft copy materials used to promote your company and your solutions.

Why is it important?

Customer credibility gives you a competitive edge. By leveraging the power of the Cisco brand, you will gain increased market recognition and realize greater business opportunities.

What is the ideal situation?

- Your prospects and customers understand what you do.
- Your messaging is aligned across your marketing and sales platform.

What are the leading practices?

- Develop a marketing plan that defines the market requirements, customer business drivers, solution offerings, and competitive landscape and provides an assessment of your goals and resource skill levels.
- Use the Campaign Builder co-branding marketing tool to ensure that your materials are aligned with

Emerging Services Partner

Create and maintain basic marketing materials that list your approach, services, and Cisco-specific practices.

Acceleration Partner

Align individual marketing vehicles such as marketing materials, websites, and events into a cohesive strategy aligned with Cisco products, branding, and sales focus.

Cisco message and still reflect your company.

- Develop a formal introduction process and “elevator pitch” that you would want any Channel Account Manager to be able to articulate to a customer or fellow Cisco employee.
- Number of marketing impressions delivered per week and per month.
- Number of leads generated.
- Conversion rate of leads – sales generated from leads provided.

What are the measurable key performance indicators or skills required?

- Number of marketing assets created.
- Number of marketing campaigns executed.

Optimization Partner

Work with your Cisco team to collaboratively create value-added customer marketing programs that drive demand for your products and services. Leverage Cisco tools and Joint Marketing Funds to increase the effectiveness and ROI of your programs.

Transformation Partner

Leverage your unique horizontal or vertical approach to create a marketing strategy that differentiates you from your competition.

Communication Methods

What is it?

Establish standard means of communication with your customers, Cisco team, and prospects.

Why is it important?

Good communication can increase productivity and sales as well as improve your industry and corporate image.

What is the ideal situation?

Customers, prospects, and the Cisco account team are regularly contacted by email, phone, or other correspondence and are aware of new developments, promotions, and other partner

activities that are relevant to their business.

What are the leading practices?

- On a consistent schedule, send out newsletters to inform customers about ongoing news and events.
- Update website regularly to reflect new promotions, developments, or activities—customer portal provides “insider” information
- Hold in-person customer user-group meetings on a consistent schedule.
- Develop a customer advisory council that provides a two-way discussion of strategic issues and market conditions.

Emerging Services Partner

Create a customer-facing newsletter and send out on a quarterly basis.

Acceleration Partner

Create a customer training event program that allows you to generate demand by sending out regular communications about your upcoming events.

What are the measurable key performance indicators or skills required?

- Frequency of outbound communications
- Frequency of customer status meetings
- Number of customers actively participating in user-group meetings or advisory councils

Optimization Partner

Create an advanced communication strategy and measurable statistics by utilizing a customer relationship management application or other advanced marketing tools.

Lead Management

What is it?

Establish processes for managing and tracking leads.

Why is it important?

Lead management provides two advantages: (1) qualified and developed leads aid in a successful sale; (2) tracking and analyzing leads helps to determine the success or failure of the marketing plan. The ratio of wins to leads can be used to estimate the amount of marketing that must be done to ensure future business success.

What is the ideal situation?

- Leads are managed as they come in from demand generation programs.
- Opportunities are assigned and followed up on.
- ROI reports are generated linking effort to results.

What are the leading practices?

- Use the Cisco Campaign Builder cobranding marketing tool to develop a customized lead generating campaign.
- Use questioning and need discovery techniques to determine lead qualification and ensure a viable lead database.

Emerging Services Partner

Create a basic lead tracking system to track incoming leads through win loss. Leverage templates and tools from Cisco to create standard methods for tracking information.

Acceleration Partner

Establish key performance metrics to track the effectiveness of your lead management processes. Track items like lead to win ratios and graph them on a month-to-month basis.

What are the measurable key performance indicators or skills required?

- Activity to lead ratio—defining best lead generation methods for your business
- Number of leads entering the pipeline per week and per month
- Number of leads turned into qualified leads per week and per month
- Lead to proposal ratio
- Lead to close ratio
- Lead pipeline by dollars or profit

Optimization Partner

Consider investing in a formal lead management system that will allow you to generate demand, funnel leads into your sales team, and track sales effectiveness statistics in real time.

Training and Customer Education Events

What is it?

Establish a routine of customer training events, seminars, and workshops to educate and promote your products, services, and solutions.

Why is it important?

Ideally, referrals or customer-driven opportunities should be a high priority for your business. The cost associated with finding new customers is much greater than that of establishing opportunities in your existing customer base. Training and educational events are a way to provide excellent service and ensure customer satisfaction and trust.

Customers who have received excellent service, as well as cost savings, will provide referrals.

What is the ideal situation?

The channel account team is aligned with your business goals working with you to build and execute programs that drive mutual benefit. Partner and Cisco have a better understanding of each others' business, strengths, and specific competencies leading to improved relationships.

What are the leading practices?

- Work with the Channel Account Manager to take advantage of the

Acceleration Partner

Create a structured series of training classes that build upon each other and increase the awareness of your customers as to your capabilities and Cisco leading technologies.

Joint Marketing Funds program to develop and promote training.

- Make training and education a major part of your customer user-group meetings. Combine training with meeting peers, sharing issues, and providing opportunities to hear from third-party industry experts.
- Survey customers after implementation to determine areas where training could have made process easier. Get suggestions on how to improve training and education.

What are the measurable key performance indicators or skills required?

- Frequency of training events
- Ratio of invitees to attendees
- Lead quantity generated from events
- Meetings generated as a result of attendance
- Proposals submitted as a result of attendance
- Closed business as a result of attendance

Optimization Partner

Integrate over-the-shoulder workshop programs to provide onsite or offsite training for your customers. Generate leads through demonstration of new technologies and techniques in a hands-on environment.

Transformation Partner

Create interactive demonstrations of new technologies and vertical solutions leveraging your own or Cisco's lab environment. Use customer testimonials and references to generate additional interest.

Advertising and Public Relation Strategy

What is it?

A coordinated approach to creating awareness in the marketplace on an efficient and cost-effective basis that assists in the demand generation process.

Why is it important?

Effective advertising and public relations can yield high ROI. According to a study done by Procter and Gamble:

- PR drives sales, often on a par with advertising.
- PR delivers stellar ROI (about 275 percent), much greater than advertising.

- PR reinforces and integrates other marketing tactics.
- PR delivers high ROI on relatively low levels of spending.

(Source: PR Week webcast on May 23 with Dr. Hans Bender of Procter and Gamble, and Mark Weiner CEO of Delabaye, discussing Procter and Gamble's statistical modeling efforts to determine the ROI of public relations)

What is the ideal situation?

Corporate branding, messaging, and public presence are aligned. Cisco, customers, and the media see you as a leader in your field.

Emerging Services Partner

Utilize Cisco Joint Marketing Funds to create case studies and other promotional materials.

Acceleration Partner

Invest in a relationship with a press agent or PR company. Establish a list of target papers and periodicals that your customer would read.

What are the leading practices?

- Work with Channel Account Manager to take advantage of Joint Marketing Funds program to develop advertising campaigns.
- Develop a complete, coordinated marketing, advertising, and PR program based upon strong, differentiated value propositions.
- Provide a realistic budget for the program and commit to unfolding over time.

What are the measurable key performance indicators or skills required?

- Press release frequency
- Outbound / inbound calling statistics
- Number of press releases per quarter
- Number of customer case studies published per quarter

Optimization Partner

Execute a program of regular press release activities to create a buzz for your products and services. Leverage customer references and testimonials.

Transformation Partner

Create news by going to press with your unique offerings, business transformation, or service capabilities.

Case Study Development

What is it?

Develop customer references for use by your sales team during the sales cycle and when responding to requests for proposal, and for marketing and PR purposes through your various marketing properties and at marketing and industry events.

Why is it important?

Case studies can be used to support and prove the success of a Cisco solution. They offer potential customers a look at a real company's business challenge, the suggested Cisco solution, and the benefits to the company. In many cases, during the sales cycle, customers request

evidence of past experience and may specifically request case study information.

What is the ideal situation?

Successful engagements are captured and used to show expertise and delivery services excellence. Marketing, sales, and service delivery all work together to establish and document successful deployments of solutions. Case studies are published on a regular basis.

What are the leading practices?

- Case studies that reflect a variety of business solutions are developed and documented for the sales team.

Emerging Services Partner

Start capturing customer testimonials, quotes, and other reference materials you can use in marketing collateral.

Acceleration Partner

Create case studies on every significant solution category you want to pursue.

- A customer testimonials database that reflects a variety of business solutions is created and managed.
- Existing Cisco case studies are easily accessible to your sales team.

What are the measurable key performance indicators or skills required?

- Case studies by segment
- Number of case studies published per quarter
- Number of case studies used in customer proposals

Optimization Partner

Collect your case studies to create a reference library of vertically aligned solutions and examples of your technical services delivery capabilities.

Transformation Partner

Market your case studies in unique applications or verticals to your Cisco team. Make them aware of your capabilities and the customers you have worked with previously.

Marketing and Market Analysis

What is it?

Know your market, competitors and customers, including their strengths and weaknesses, so you can better define and position your unique value proposition

Why is it important?

Understanding your competition and your customer's needs will help you keep your competitive advantage and help you clearly communicate how your products and services are different or better.

What is the ideal situation?

Business managers, sales personnel, and marketing staff are all aware of the strengths and weaknesses of your business and your competitors. Business and sales messaging are aligned to highlight your strengths and differentiate you from your competitors.

What are the leading practices?

- Implement a training plan for sales and marketing personnel that ensures an understanding of competitors' strengths and weaknesses.
- Conduct a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) for your competitors to determine their strengths and weaknesses.

Emerging Services Partner

Create a list of your competitors. Review their websites and marketing materials. Come up with ideas to position yourself differently in the market.

Acceleration Partner

Purchase or create a list of target industries in your area. Look for prospects similar to customers you have done business with in the past.

- Write sales materials that focus on your strengths and competitive advantages.
- Continually review competitors' websites to ensure you are on top of changes in their positioning.
- Conduct consistent win/loss assessments to determine why you were not successful; determine which competitor won and why.
- Attend major and local trade shows for informal survey of competitors and their people.

What are the measurable key performance indicators or skills required?

- Frequency of competitive analysis completion
- Frequency of win/loss status
- Comparison of win/loss status with major competitors
- Frequency of attendance at major/local trade shows

Optimization Partner

Work with your Cisco team to establish unique market opportunities you can develop or exploit in your area. Align your capabilities to meet these needs.

Transformation Partner

During your business transformation, be sure to understand where the business opportunities are so that your position is unique in comparison to other partners in your business or geographic market.

Unique Value Proposition

What is it?

Create a story to clearly illustrate to your customers and Cisco how you provide value by uniquely satisfying the business needs of your customers.

Why is it important?

A Unique Value Proposition (UVP) distinguishes your company from other companies. It tells customers that you understand their business and that you have provided a similar solution to others. It lets them see that you offer value for money that others do not, and it gives them a reason to care about what you have to say. A strong UVP will let you sell

based on value, not price. As a result, margins will improve.

What is the ideal situation?

You have developed a UVP using the knowledge and experience of several customer-facing people in the organization. Your sales team can articulate your UVP clearly to the customer. The message feels natural and is a driving force to the creation of new opportunities and customer value.

What are the leading practices?

- Research and understand your market focus and analyze your competitors to better define the unique aspects of what you do and deliver.

Emerging Services Partner

Establish a list of what is unique about your company. Create your UVP statement.

Acceleration Partner

Integrate your UVP into your sales training, marketing materials, and other customer-facing collateral.

- Your value proposition is reviewed at least once per year and tested with customers and the Cisco team to ensure that it is accurate and relevant before it is made “official”.
- The UVP is expressed in all messages that you publish or distribute.
- The UVP has been reviewed and revised within the last 12 months.
- Percentage of opportunities identified through presenting your UVP is tracked.

What are the measurable key performance indicators or skills required?

- Sales and presales staff are regularly required to present the UVP in a company meeting.
- Personnel have the technical certification to deliver according to your UVP.

Optimization Partner

Couple market analysis with the definition of your UVP. Survey your Cisco team, customers, and prospects to determine what is needed and wanted in your market. Adjust your UVP to meet that need.

Transformation Partner

Leverage your prior business and vertical expertise into your UVP.

Demand Generation

What is it?

Execute demand generation programs to create awareness, demonstrate value, and generate leads.

Why is it important?

A well planned demand generation program empowers your marketing team to produce a continuous flow of high quality leads for your sales team, which generates new business opportunities. Weak or unqualified leads waste valuable time and can create distrust between marketing and sales.

What is the ideal situation?

Your Unique Value Proposition (UVP) has been clearly articulated in well-designed marketing messages and material. An internal or external resource has been developed to consistently create awareness and secure prospects who have expressed a need that can be satisfied by your UVP and have the necessary budget to pay for the solution. Your company has made a commitment to maintaining an ongoing program for demand generation that creates leads and other new business for your sales team.

Emerging Services Partner

Create a program that generates interest in your existing customers for new products and services.

Acceleration Partner

Create a structured process for creating demand in your prospects for services related products that you sell.

What are the leading practices?

- Embed your well-developed Unique Value Proposition into all messages.
- Define your marketing and demand generation goals.
- Research your competition and incorporate findings into your demand generation plan.
- Clearly define your target market.
- Include marketing to your base as well as new business opportunities in your plan.
- Plan demand generation programs for both current and future times.
- Utilize Cisco programs and tools for maximum demand generation
- Leads generated by vertical/ solution/geography
- Leads generated by source— advertising/PR/lead provider (Cisco/vendor/internal)
- Percent of leads from referrals
- Percent of leads for opportunities with existing base versus new prospects

What are the measurable key performance indicators or skills required?

- Number/ dollar revenue/dollar gross margin of leads needed on monthly basis to satisfy forecast
- Number/ dollar revenue/dollar gross margin of leads generated monthly

Transformation Partner

Create an installed-base marketing program that generates interest in your current customers for new horizontal or vertical solutions you're offering.

Customer Loyalty Program

What is it?

Develop a business vision to make your company a trusted advisor to your customers and essential to the business of many by creating ongoing programs designed to deliver solutions with unique value that lock in customer accounts and establish long-term strategic relationships.

Why is it important?

Successful businesses are built on loyal, satisfied customers. Experience shows that Cisco customers value the security of having professional network support to build the best networks and keep them operating

24 hours a day. Network service contracts create the most loyal customers. They have made you and Cisco essential to their business.

Partners who achieve outstanding customer satisfaction levels are rewarded by Cisco with recognition of their excellence in the Cisco Partner Locator. In addition, Cisco rewards partners for their loyalty to Cisco and value-add to customers through enhanced economic incentives, new ways to capitalize on the Cisco brand, preference within the Cisco sales organization, comarketing opportunities and funding, and a variety of service enablement programs.

Acceleration Partner

Create a process for measuring the repeat business you receive in accounts. Create programs to generate additional purchasing loyalty and measure whether this helps increase customer loyalty.

Customers become loyal because they are provided with unique value. Business with loyal customers provides greater revenue consistency and predictability and higher margins.

What is the ideal situation?

Customers recognize the financial, technical, and practical value of engaging with your company to deliver solutions. They trust your knowledge and ability to help. As a result, they call you first when they think of technology decisions.

What are the leading practices?

- Commit to delivering Cisco-based solutions that are creative and, based on their value, will be trusted by all and essential to many customers.
- Build a horizontal and vertical solution strategy based upon your knowledge of markets and your customers' business drivers.
- Apply enhanced survey tools to accurately and easily measure customer satisfaction levels.

- Build customer network maintenance and technical services with Cisco to create a maintenance business that provides a recurring and renewable revenue stream at higher margins.

What are the measurable key performance indicators or skills required?

- Customer satisfaction ranking compared to period prior to introduction
- Percent of revenue from recurring business versus period prior to introduction
- Margin generated from recurring business versus nonrecurring

Optimization Partner

Highlight customer wins in case studies and testimonials. Publish "win" data to Cisco's field team.

Transformation Partner

Create loyalty incentives for existing customers by providing financial or other services incentives to investing in your new offerings. Track and measure the success of each offering and replicate with all your customers.

Cisco Resources for Successful Marketing and Customer Loyalty

Market Technologies and Services

Develop a sound marketing strategy by identifying your business and marketing objectives and defining your unique value proposition.

LOCATION: [PARTNER CENTRAL](#) > [CHANNEL PARTNER PROGRAM](#) > [MARKET TECHNOLOGIES AND SERVICES](#)

Campaign Builder:

Build your end-to-end solution with Campaign Builder from Cisco. From invitations to flyers, Campaign Builder allows you to create customizable collateral to help increase customer awareness and reduce time-to-market and overall costs.

LOCATION: [PARTNER CENTRAL](#) > [MARKET TECHNOLOGIES AND SERVICES](#) > [CAMPAIGN BUILDER](#)

Marketing Made Easy Webcast:

A monthly Web Seminar Series for Cisco Channel Partners.

LOCATION: [PARTNER CENTRAL](#) > [PARTNER EVENTS](#) > [MARKETING MADE EASY WEBCAST](#)

Marketing and Demand Generation:

Tools to assist you in your marketing and demand generation activities.

LOCATION: [PARTNER CENTRAL](#) > [SELL CISCO TECHNOLOGIES AND SERVICES](#) > [SMALL, MEDIUM AND MID-SIZED BUSINESS](#) > [SMB SELECT PARTNER PORTAL](#) > [MARKETING AND DEMAND GENERATION](#)

Joint Marketing Funds Program:

The Joint Marketing Fund is available to help you grow your business with Cisco. Channel Account Managers can use it to drive additional revenue generation or development programs with their partners. It can be used for certification and specialization; seminars or approved demand generation marketing programs; and advertising.

LOCATION: [PARTNER CENTRAL](#) > [MARKETING FUNDS](#)

Channel Incentive Programs:

Cisco offers three financial incentive programs for partners who actively promote new business opportunities, integrate Cisco into their business solutions, and have customer satisfaction (see *Glossary*).

LOCATION: [PARTNER CENTRAL](#) > [CHANNEL PARTNER PROGRAM](#) > [CHANNEL INCENTIVE PROGRAMS](#)

Promotion Programs:

Learn about Cisco's latest promotions.

LOCATION: [PARTNER CENTRAL](#) > [SELL CISCO TECHNOLOGIES AND SERVICES](#) > [PROMOTIONS](#)

Services Promotions–ARM Service Incentive Program:

The Cisco ARM Program is designed to educate and empower partners on the value of selling Cisco services to their customers.

LOCATION: [PARTNER CENTRAL](#) > [SELL CISCO TECHNOLOGIES AND SERVICES](#) > [PROMOTIONS](#) > [SERVICES PROMOTIONS](#)

Customer Communications:

Cisco offers its partners a new set of informational and communication resources including a Customized Partner Intelligence Newsletter and Cobranded Newsletter Tool.

LOCATION: [PARTNER CENTRAL](#) > [CHANNEL PARTNER PROGRAM](#) > [NEWS](#) > [SUBSCRIBE](#)

Develop Your Success Stories:

In collaboration with Cisco, develop case studies for your sales team.

LOCATION: [PARTNER CENTRAL](#) > [CHANNEL PARTNER PROGRAM](#) > [NEWS](#) > [SUCCESS STORIES](#)

Cisco Case Studies :

Organizations of all sizes, industries, and regions are using networking technology to help increase productivity, reduce costs, and create new revenue sources. Review existing case studies by technology and by industry.

LOCATION: [ABOUT CISCO](#) > [CHANGING YOUR BUSINESS](#) > [CASE STUDIES](#)

Partner Success Stories by Date, Technology, and Industry Verticals:

In collaboration with Cisco, develop case studies for your sales team.

LOCATION: [ABOUT CISCO](#) > [NEWS@CISCO](#) > [NEWS](#) > [PARTNER](#) > [SUCCESS STORIES](#)

Competitive Edge Portal:

Use this site to learn the most up-to-date information and tools about how to position yourself as a leader in the industry when you are selling Cisco products against the competition.

LOCATION: [PARTNER CENTRAL](#) > [SELL CISCO TECHNOLOGIES AND SERVICES](#) > [COMPETITIVE EDGE PORTAL](#)

Cisco Marketing and Customer Loyalty: How Am I Doing?

Use the checklist below to determine your progress toward successful Cisco marketing

Goal	Yes	No	In Progress
Customers are updated consistently by newsletters, websites, and user-group meetings			
A customer advisory council has been established			
Cisco Campaign Builder is used to develop a customized lead generating campaign			
Questioning and need discovery techniques are used to determine lead qualification and develop a lead database			
Lead metrics are measured and tracked			
Training and customer education events are combined for maximum lead generation			
Cisco Joint Marketing Funds program is used to develop advertising campaigns			
A complete, coordinated marketing, advertising, and PR program is developed based on our Unique Value Proposition and a realistic budget			
Advertising and PR metrics are tracked for press releases, calling statistics, and publications			
Customer testimonials and case studies for a variety of business solutions are easily accessible by sales team			
A SWOT analysis has been conducted to determine competitors' strengths and weaknesses			
Sales and marketing personnel are trained to understand competitors' strengths and weaknesses			
Sales materials focus on our strengths and competitive advantages			

Goal	Yes	No	In Progress
Competitors websites are reviewed to stay on top of changes in their positioning			
Win / loss assessments are conducted on a continual basis			
Major and local trade shows are attended for informal survey of competitors and their people			
Our Unique Value Proposition is reviewed annually and tested with customers and Cisco team to ensure accuracy and relevancy			
Our Unique Value Proposition is expressed in all published and distributed messages			
Marketing and demand generation goals are well defined and based on research			
Target market is clearly defined			
Demand generation plan includes separate strategies for marketing to customer base, new prospects, and new markets			
Cisco programs and tools are used for maximum demand generation			

Chapter 3.3



Guide to Successful Sales

This chapter describes the key components, steps, and aspects associated with the establishment and operation of a successful sales team, selling techniques, and management environment, together with the various frameworks, systems, and facilities that need to be in place.

Key Performance Indicators to Measure the Success of Your Sales Team

Attributes

Customers call you first when they think of technology decisions. They recognize the financial, technical, and practical value of engaging with your company to deliver solutions.

Territory business plans are complete and published.

Sales teams are fully staffed and trained in all targeted locations.

Partnering network is established and operational.

Competitive compensation plans are in place for all sales staff.

All administrative and reporting functions are fully operational.

A well-defined, well-understood solution selling methodology is being used by all sales and presales teams.

An opportunity management framework provides a repeatable process and corresponding tools for qualifying an opportunity, setting the proper account strategy, building a business case for the solution, and positioning the appropriate services.

A dedicated, fully functional demo lab is in place, with scenarios and presentation scripts ready to use for customer solutions.

Account management and sales team have the most current technical training certification and specialization.

You have a complete suite of services built around a well-defined service framework, together with marketing collateral and service delivery guides and tools.

Your maintenance business provides you with a recurring and renewable revenue stream as well as satisfied customers.

Building Blocks for a Successful Sales Organization

Business	Sales Skills and Allocation	73
Fundamentals	Territory Development	75
	Compensation Plan	77
Operational	Opportunity Management Framework	79
Excellence	Demonstration Fundamentals	82
Creating Customer Value	Solution Selling Framework	84



Sales Skills and Allocation

What is it?

Establish Cisco specific sales competencies for your account management and presales system engineers. Cisco provides three levels of specialization to develop sales, technical, and services expertise in a particular technology. They are Express Specialization, Advanced Specialization, and Master Specialization. *(See Glossary for more detail.)* The certification requirements for each level are incorporated into the specialization levels.

Why is it important?

Investing in sales training, certification, and specialization will help you accelerate growth, differentiate your business, and increase your profitability. The enhanced programs enable you to extend your capabilities to be a provider of broad, integrated networking solutions, highly specialized solutions, or both. The combination of lowering the cost of doing business, enhanced economic incentives, and driving new business will enhance your growth, profitability, and return on investment over time.

Emerging Services Partner

Engage in basic sales skills and product training for all your sales teams. Commit to having basic sales certifications in all product categories.

Acceleration Partner

Standardize on a solution selling training program for your sales staff. Focus on consultative and solution-focused models that apply specifically to the IT industry and technology sales.

What is the ideal situation?

- Sales team utilizes the latest in Cisco field sales and presales technical training in alignment with field sales organization.
- Customers receive the solution development skills and technical know-how of Cisco products and solutions.

What are the leading practices?

- Create a training path that allows the sales team to achieve certification and specialization levels.
- Implement a skills profile and training plan for account managers and presales engineers that aligns with your growth plan.
- Develop an account manager training refresh plan that aligns with your growth plan.
- Closely couple your training budgets to your solution attach rate strategy and new product introduction process.
- Make sure your training budgets map to growth paths, allocation requirements, and competencies gaps.

What are the measurable key performance indicators or skills required?

- Technical certifications achieved by sales/presales person
- Sales skills training courses taken by sales/presales person
- Percentage of sales team certified and trained
- Correlation between training and achievement—dollar revenue / dollar gross margin / dollar gross margin
- Percentage and velocity of qualified opportunities closed before and after certification/training

Territory Development

What is it?

Through territory development, you can ensure geographic consistency and provide a way to prioritize and maximize opportunities within a region.

Why is it important?

With thorough planning and precise reporting, you can produce the best results possible and ensure growth for each region. Appropriate resource allocation of sales and services delivery personnel will increase close ratios and utilization, reduce the total cost of sales, increase customer satisfaction, and raise project profitability.

What is the ideal situation?

- Market research has identified and quantified opportunities sufficient

to satisfy your revenue and profit forecasts.

- Territory plans are complete and published.
- Sales teams are fully staffed and trained in all targeted locations.
- Partnering network is established and operational.

What are the leading practices?

- Identify opportunities within your existing customer base.
- Identify a universe of “conquest opportunities” where your UVP will allow you to gain market share
- Track sales metrics critical to improving potential revenue, gross margins, and cost structure.
- Ensure that all territories understand how to engage Cisco

resources to qualify and sell solutions, thereby maximizing revenue per customer.

- Optimize team focus through well-defined discovery and use of a rigorous “go-no-go” process to establish which opportunities should receive scarce resources.
- Reduce your sales support costs by maximizing repeatable processes and minimizing administrative overhead.
- Certify an area or region as capable of addressing the lifecycle requirements of an engagement thus ensuring quality service.
- Provide a sales plan that can be executed consistently across all regions yet takes into account regional differences in maturity.
- Develop a formula for determining the number of sales resources necessary to maintain a regions growth plan.
- Develop an attach rate strategy to maximize revenue per customer.

What are the measurable key performance indicators or skills required?

- Increase in blended margin (hardware represents less of total revenue)
- Increase in applications attach rates
- Improvement in selling Planning & Design Services
- Implementation no longer dominates services revenue stream
- Increase in annuity revenue due to operations and optimization services
- Improved gross margins at point of sale
- Dollar revenue/dollar gross margin per opportunity in pipeline/closed
- Ratio of total solution sale to product component
- Percent of revenue/margin that is continuing/annuity
- Gross margin percent before and after territory plans were in place

Compensation Plan

What is it?

Develop a compensation plan that aligns with the company business vision and direction, links pay to performance, and provides a way to quantify results. It includes measurement statistics, tracking reports, and other tools for tracking goal to plan information.

Why is it important?

Well-defined criteria simplify performance and incentive management as well as the employee review process. In addition, tracking the success or failure of the performance goals can help you identify

any necessary changes in strategy for sales growth.

What is the ideal situation?

Competitive compensation plans are in place for all sales and presales staff. All administrative and reporting functions are as simple as possible and fully operational.

What are the leading practices?

- Ensure a sales team growth strategy based on skills and performance.
- Reward sales for high-margin products and services.

Acceleration Partner

Create a compensation plan that includes sales influencers such as presales technical, project management, and other sales support personnel.

- Identify sales roles and responsibilities that align with your growth plan.
- Transition sales leader responsibilities to more profitable activities.
- Educate the sales team on what makes a deal profitable and not profitable.
- Identify the goals for a presales training plan.
- Create and implement a compensation plan for presales engineers.

What are the measurable key performance indicators or skills required?

(Note: All indicators to be calculated by sales person/vertical/solution category)

- Percent of total compensation to dollar revenue/dollar gross margin—forecast and actual
- Dollar revenue/margin generated before and after introduction of plan
- Percent of actual revenue/gross margin to forecast
- Percent of revenue/gross margin from high-margin products and services

Transformation Partner

Align compensation plan structure to drive behaviors to sell new products and services. Create accelerator or bonus compensation for selling strategic products and services.

Opportunity Management Framework

What is it?

Establish a structured opportunity management framework that includes opportunity identification, qualification, scoping, pricing, proposal presentation, and closing. To successfully sell a solution, you must have a method to identify, qualify, and define the needs of your prospective customer.

Why is it important?

Having opportunity management tools and templates:

- Provides a more effective way to qualify the system-level reasons

and nontechnical individuals who will impact the decision process.

- Maximizes the potential revenue of the initial sale.
- Ensures that the customer understands the business benefits associated with purchasing new solution products, custom applications, or services in future years.

What is the ideal situation?

Opportunity management framework is in place, well defined, well understood, and is being used by all sales and presales teams. The key attributes of a healthy model are a repeatable process and corre-

Emerging Services Partner

Define a formal opportunity management process. Put spreadsheets or other systems in place to track the progress of opportunities through your organization.

Acceleration Partner

Create a process flow and assign responsibilities for each step to key members of your personnel. Attach service level agreements to your handling of tasks in the process to set proper expectations between departments.

sponding tools that enable a sales team to qualify a Cisco opportunity, set the proper account strategy, build a business case for the solution, and position the appropriate services.

Presales milestones:

- Identify primary decision makers, budget, and timing of opportunity.
- Determine end-customer business issues and requirements.
- Perform end-customer phone and face-to-face sales calls.
- Provide high-level design to customer.

Optimization Partner

Evaluate key statistics relating to opportunity management and define a strategy for increasing your effectiveness in scoping and closing services engagements.

What are the leading practices?

- Implement a repeatable process and standard template for collecting customer business and technical requirements that optimizes the presales discovery process.
- Create a formalized, presales solutions assurance and professional services scoping process and templates.
- Ensure a comprehensive and repeatable opportunity management, planning, design, and implementation construct.
- Develop an opportunity qualification process that ensures consistent execution of high-quality

- pipeline data and efficient use of presales support resources.
- Optimize product and services scoping, quoting, pricing (Bill of Materials and Statement of Work), and proposal and presentation development.
 - Set the vision for the customer.
 - Know that you are talking to the right person (who sets and who absorbs budget).
 - Establish presales technical assurance process and tools.
 - Create, implement, and maintain standard policies through a knowledge management portal or an operations portal.
 - Automated sales process
 - Dollar revenue/gross margin per opportunity in pipeline/closed
 - Gross margin percent per opportunity in pipeline/closed
 - Velocity of opportunities—length of selling cycle
 - Market expense per dollar revenue/gross margin
 - Percent service revenue/gross margin to total revenue/gross margin

What are the measurable key performance indicators or skills required?

- Sales-ready content
- Initial account qualification tools and templates
- Account planning in alignment with Cisco
- High-level design and quality assurance requirements

Demonstration Fundamentals

What is it?

Create a demo lab and customer training facility that includes designing, building, and promoting your lab capabilities. A full-spectrum demonstration facility typically can demonstrate hardware, software, and business specific usage of a particular solution.

Why is it important?

The ability to demonstrate the potential of an end-to-end Cisco solution can help to build credibility with the customer and result in a significant reduction in the sales-cycle time. Therefore, it is important

to have a robust demo facility and the appropriate demo policies.

What is the ideal situation?

A dedicated, fully functional demo lab is in place, with prebuilt scenarios and presentation scripts that can be used for customer solutions.

What are the leading practices?

- Develop a product demonstration framework that emphasizes the business and technical value of Cisco-based solutions.
- Ensure that the pitch and demo are relevant to the audience and meet the requirements for a good demo.

Emerging Services Partner

Create a basic demo kit for your key technologies and solutions. Work with Cisco to acquire templates for demonstration and demonstration techniques.

- Use industry vignettes to depict the power of securing, mobilizing, and converging the customer's business.
- Ensure that the presales team delivering the demo is well trained and competent in the delivery of the demo.
- Standardized roles (one person who specializes in giving demos)
- Standardized processes (scripts, feedback, etc)
- Demonstration configurations preconfigured for easy access during demonstrations
- Partner usage of technical demonstration in business and solution development

What are the measurable key performance indicators or skills required?

- Variety of demonstrations available (technical, business, EBC, Cisco Proof of Concept)
- Ability to identify audience and requirements

Optimization Partner

Invest in demonstration capabilities for all key products and solutions. Formalize your demo facility and train staff on the proper use of facilities for demonstration purposes.

Transformation Partner

Use industry-specific software and customer IT scenarios to create a demonstration lab that is specific to your transformation situation.

Solution Selling Framework

What is it?

Adopt a solution selling framework that involves an honest analysis of a customer's goals, needs, and situation to impartially determine whether or not your product or service will meet their requirements. The early stages of the sales process must be spent building a rapport and asking questions that help you qualify the sales potential, find the best solutions to their business needs, and establish a business case for the solution. The later stages include presenting your solution and closing the sale.

In solution selling, you are selling a vision as well as an application; therefore, the vision you sell has to be very real to the customer. This makes technical presales solution selling readiness equally as important.

Why is it important?

Customers are loyal to solution focused vendors. Business executives spend time with vendors who understand their business and its drivers and have the capability to build a strategic partnership with the customer.

According to Reicheld & Sasser, Harvard Business Review #90508, "As a customer's relationship with the company lengthens, profits rise, and not just a little. Companies can boost profits by almost 100 percent by retaining just 5 percent more of their customers."

Having a structured and repeatable approach to working with customers and establishing a trusting relationship with them is a key attribute to a well-established solution selling framework.

Emerging Services Partner

Invest in training your sales and presales SE staff in a solution selling based sales process.

Acceleration Partner

Perform ride-along and other field training and review methods to ensure that solution selling methodology is being followed routinely and that it successfully incorporates your Unique Value Proposition and services offerings.

What is the ideal situation?

A solution selling methodology is in place, well defined, well understood, and is being used by all sales and presales teams. Customers are comfortable sharing business requirements in a trusting relationship with your company, and you keep competitors away with your ability to meet the needs of your customers.

What are the leading practices?

- Define a comprehensive presales discovery and confirmation process.
- Implement a sales engagement model that includes a repeatable solution selling sales process.
- Identify a presales technical resource model and process model that eliminates current bottlenecks.
- Develop a sales strategy to capture service revenue at the post-install/fulfillment point of sale. Attaching services at point of first sale (attach rate) is a key factor in the value that maintenance service can add to a partner's network business.
- Develop a presales technical solution development framework

that focuses on a high level of accuracy and systems assurance.

- Develop the following skills: relationship building, opportunity discovery, pricing and statement of work development, objection handling, and closing.
- Create a business case that provides both business and financial justification for a customer to use in evaluating adoption of a solution.
- Identify key players, issues, timelines, and the scope of the opportunity.

What are the measurable key performance indicators or skills required?

- Dollar revenue/gross margin per opportunity in pipeline/closed
- Gross margin percent per opportunity in pipeline/closed
- Market expense per dollar revenue/gross margin
- Percent service revenue/gross margin to total revenue/gross margin
- Reduced instances of pursuing inappropriate, unqualified business
- Improved velocity—selling cycle time reduction

Optimization Partner

Document and track sales effectiveness relating to your selling methodology, not just number of leads or gross profit. Create and evaluate performance to sales benchmarks and manage accordingly.

Cisco Resources for Successful Sales

Cisco Sell Technologies and Services:

Cisco provides channel partners with sales research, product specs, services, and ordering information so that you find the products and solutions that benefit you and your customers.

LOCATION: PARTNER CENTRAL > CHANNEL PARTNER PROGRAM > SELL TECHNOLOGIES AND SERVICES

Presentation Builder:

Presentation Builder provides you with an easy-to-use, graphical way to sort through numerous Cisco presentations, allowing you to quickly locate and develop presentations for your customers about Cisco technologies and solutions.

LOCATION: PARTNER CENTRAL > CHANNEL PARTNER PROGRAM > SELL TECHNOLOGIES AND SERVICES > PRESENTATION BUILDER

Services Delivery Tools:

These tools help partners find new network migration, optimization, and replacement opportunities.

LOCATION: PARTNER CENTRAL > CHANNEL PARTNER PROGRAM > SELL TECHNOLOGIES AND SERVICES > THE DISCOVERY TOOL

Unified Communications – Resources:

Use these resources to offer your customers the most effective Unified Communications solutions for their business networks. Find new ways to boost sales and to more easily keep up with the latest news, programs, promotions, and more.

LOCATION: PARTNER CENTRAL > CHANNEL PARTNER PROGRAM > SELL TECHNOLOGIES AND SERVICES > TECHNOLOGIES > UNIFIED COMMUNICATIONS > RESOURCES

Partner Overview Presentation Product Demo Kit:

The Cisco Demo-in-a-Box program helps Cisco Channel Partners close deals and drive revenue with small and medium-sized business and midmarket customers through comprehensive program services including:

- Demonstration kits that are highly mobile and easy to setup. Use the preracked, preconfigured, supported demonstration platform to add applications for customized, impactful presentations that respond to customer business needs.
- Integrated tools that help make demonstrations an integral part of your sales and marketing strategy.
- Online training, documentation and 24-hour support.

LOCATION: PARTNER CENTRAL > CHANNEL PARTNER PROGRAM > SELL TECHNOLOGIES AND SERVICES > TECHNOLOGIES > UNIFIED COMMUNICATIONS > SMALL, MEDIUM AND MID-SIZED RESOURCES

Vertical Sourcebook:

Use this guide as a starting point for understanding Cisco vertical solution offerings, the industries they are designed to serve, and how these solutions can help you better meet the needs of specific industry segments.

LOCATION: PARTNER CENTRAL > CHANNEL PARTNER PROGRAM > SELL TECHNOLOGIES AND SERVICES > VERTICAL SOURCEBOOK

Steps to Success:

Online resource providing industry leading methodology and access to presales and postsales technical reference materials, project plan and deployment templates, tools, best practices, and case studies.

LOCATION: PARTNER CENTRAL > STEPS TO SUCCESS

Cisco Lifecycle Services - Prepare Phase:

The Cisco Lifecycle Services help you deploy, operate, and optimize Cisco solutions to strengthen customer relationships and enhance profitability (*see Glossary*).

Through the Steps to Success Portal, you can access the Cisco Lifecycle Services Prepare phase, which provides a set of first steps that create a high-level understanding of the business, technical, physical infrastructure, and financial requirements involved in the engagement.

Start by selecting the appropriate technology / market segment option. You can view each of the lifecycle phases—Prepare, Plan, Design, Implement, Operate, and Optimize. Under each phase, there are service components describing various resources and tools to help you.

LOCATION: PARTNER CENTRAL > STEPS TO SUCCESS > VIEW PROCESS FLOWS

Channel Incentive Programs:

Cisco offers three financial incentive programs for partners who actively promote new business opportunities, integrate Cisco into their business solutions, and have high customer satisfaction (see *Glossary*).

LOCATION: PARTNER CENTRAL > CHANNEL PARTNER PROGRAM > CHANNEL INCENTIVE PROGRAMS

Cisco's Unified Communications – Programs and Promotions:

Cisco offers three financial incentive programs for partners who actively promote new business opportunities, integrate Cisco into their business solutions, and have high customer satisfaction (see *Glossary*).

CATION: PARTNER CENTRAL > CHANNEL PARTNER PROGRAM > SELL TECHNOLOGIES AND SERVICES > TECHNOLOGIES > UNIFIED COMMUNICATIONS > PROGRAMS AND PROMOTIONS

Cisco Sales Training:

Learn about Cisco's Partner E-Learning Connection site, which has training resource to enhance your competitive position.

LOCATION: PARTNER CENTRAL > PARTNER E-LEARNING CONNECTION (PEC) > SALES CENTRAL

Sales: How Am I Doing?

Use the checklist below to determine your progress toward a successful sales team and environment.

Goal	Yes	No	In Progress
Opportunities are identified within our existing customer base.			
Territories understand how to engage Cisco resources to qualify and sell solutions.			
Regions are certified to address the lifecycle requirements of an engagement.			
Our sales plan can be executed consistently across all regions yet takes into account regional differences in maturity.			
Sales costs are controlled through repeatable processes and a formula to determine resource allocation among regions.			
Our attach rate strategy maximizes revenue per customer.			
Sales team growth strategy is based on skills and performance, and training plan goals are clearly identified.			
Competitive compensation plans are in place for all sales staff.			
Sales and account manager roles and responsibilities are identified and aligned with our growth plan.			
Sales team is educated on what makes a deal profitable.			
A repeatable discovery process and template for collecting customer business and technical requirements is available.			
A repeatable solution selling sales process is implemented.			

Goal	Yes	No	In Progress
A sales strategy to capture service revenue at the post-install and fulfillment point of sale is in place.			
Sales training includes relationship building, opportunity discovery, pricing and SOW development, objection handling, and closing skills.			
Our opportunity qualification process ensures consistent execution of quality pipeline data and efficient use of presales support resources.			
A knowledge management or operations is established to create, implement, and maintain standard policies.			
A product demonstration framework that emphasizes the business and technical value of Cisco solutions is in place.			
Demos include industry vignettes, meet good demo requirements, and are delivered by qualified personnel.			
Training budgets map to growth paths, allocation requirements, and competencies gaps.			
Suite of solutions based on horizontal capabilities is available and can be cost-effectively delivered to most customers.			
Vertical solutions are based on knowledge gained from most profitable, core customer solutions.			
A product and services sales and delivery strategy that maximizes account revenue over the customer lifecycle is developed.			
A maintenance business that provides recurring and renewable revenue stream by providing a trusted, essential service is in place.			
Cisco programs, resources, and applications as well as third-party applications are used to ensure the best solution.			
Enhanced survey tools are applied to accurately and easily measure customer satisfaction levels.			
Business cases provide both business and financial justification for a customer to use in evaluating adoption of a solution.			
Interviews are used to gather high-level solution requirements and identify key players, issues, timelines, and the opportunity scope.			

Chapter 3.4



Guide to Successful Professional Services Delivery

This chapter provides an overview of the key components that are required to successfully deliver services-based solutions to customers. It includes guidance and leading practices as well as relevant templates and tools.

Key Performance Indicators to Measure the Success of Your Professional Services Delivery

Attributes

Projects are executed successfully by a well-trained, motivated staff using standard project management methodologies.

Standard engagement services delivery methodology is in place with a full set of tools and templates available to support the process.

All changes to a project plan baseline are managed through project change management and delivered through templates and guidance.

Resource management, change control, and risk management methodology, tools, and processes are in place.

Services delivery team fully understands the customer business and technical requirements and establishes a high-level design that addresses the customer's requirements.

A pre-implementation design plan that everyone agrees on is created following the information gained through assessment of both customer business needs and technology currently deployed.

A completed implementation includes fully operational systems; solution aligned with business plan; outages identified and resolved; fully trained operations staff and users; responsibilities transferred to operations group.

Customer feedback is collected through surveys and changes are implemented in accordance with customer requirements and project scope.

Completed projects are handed over to customer with technical training, documentation, and contracts complete, and all relevant project data captured in the company knowledge management system.

Building Blocks for Successful Professional Services Delivery

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Services Delivery Skill Building and Allocation

What is it?

Establish a staffing and training model for the organization that includes recruiting, training, certification, staffing, human resources, and career paths.

Why is it important?

If you want the best staff providing the best services delivery, it is essential to anticipate the staffing requirements, provide training tailored to the job and individual needs, and reward employees for their contributions. Having a well-structured staffing and career model also improves employee retention and motivation.

What is the ideal situation?

Fully staffed technical team, with all staff fully trained. Well-defined career paths in place, a motivated staff engaged, and projects are executed successfully.

What are the leading practices?

- Develop a service delivery roles and responsibilities model that clearly defines required competencies as well as responsibilities.
- Create a skills profile and training plan for technical staff and project management leads.

Emerging Services Partner

Get technical training for all your key services personnel. Ensure that they have the proper certifications for the products and services you will be selling.

Acceleration Partner

Create a training plan that maps out key positions, training requirements, and a schedule for training. Share this information with your staff. Work with your local Cisco team to identify areas of opportunity to accelerate training where there is greatest technical need.

- Develop a compensation model that rewards critical service delivery success factors such as improvements to operational processes, improvement to tools, and the capturing of field leading practices.
- Develop a compensation structure that takes into account domain expertise, growth plan, mentoring, and knowledge management contributions.
- Staffing and career plan
- Technical training plan
- Compensation plan for technical staff
- A staff development plan from ramp-up to refresh that includes certifications
- A retention plan that takes into account attrition, turnover, and reward
- Capacity and allocation budgeted according to forecast

What are the measurable key performance indicators or skills required?

- Clearly defined roles
- A resource management plan

Optimization Partner

Create an internal program that encourages and creates incentives for ongoing technical education.

Project Management Framework

What is it?

Establish an engagement services delivery and management model that includes resource management, project management methodology, skills, and a set of standard templates and tools. All risks identified are managed through project risk management, delivered through templates and guidance.

Why is it important?

A standard project and program management methodology, together with policies, templates, and supporting systems, is required to execute and manage the services delivery of projects on a consistent basis. Schedule, resource, and budget management are essential for successful project execution.

What is the ideal situation?

- Standard engagement services delivery methodology is in place with a full set of tools and templates available to support the engagement services delivery process.
- All changes to project plan baselines are managed through project change management, delivered through templates and guidance.
- Resource management methodology tools and processes are in place and resource utilization is optimized.
- Risk management methodology is in place and all engagements are executed with minimal risk. All risks mitigated.

Emerging Services Partner

Designate key staff members to fill the role of project or engagement manager on all service projects.

Acceleration Partner

Engage in standard project management training and certification of key individuals.

- All project managers are fully trained in project management methodology. All projects are delivered through standard project management practices.

What are the leading practices?

- Establish an engagement operations management model. This includes statements of work (SOW), IP reuse, resource planning, data capture, reporting, communication, escalation, engagement support, and subcontractor management.
- Create, implement, and maintain standard policies through a knowledge management portal or an operations portal.
- Establish a scalable communication plan for cross-functional teaming with the project manager as the single point of contact for all communication efforts.
- Establish an employee communication portal that addresses end-user concerns and questions. Procedures for addressing user problems, network outages, and overall case management should be outlined.

What are the measurable key performance indicators or skills required?

- Project services delivery model is established and followed.
- Project services delivery tools and templates are used to promote consistency.
- Project services delivery team structure, budget, roles, and responsibilities are defined in the model.
- A change request form is used to execute changes to the statement of work.
- Routine use of tracking tools and planning documents.
- Weekly meetings to ensure communication between stakeholders and to outline the project health status.
- Number of projects successfully delivered in time and within budget.

Optimization Partner

Create a PMO structure inside of your organization that allows you to better utilize project management techniques and best practices for your projects.

Transformation Partner

Create project templates for integration and migration plans for your customers. Refine and reuse these templates to create a smoother transition for customer transitioning into a Cisco-based infrastructure.

Project Handover and Closure

What is it?

Once the solution is fully delivered and stable, it is necessary to ensure that the complete solution is handed over to the customer staff responsible for ongoing support and management of the solution. This may include the provision of support guides and technical user training.

Why is it important?

To ensure that the solution delivered to the customer continues to perform effectively and continues to address the original business problem in the most efficient manner, the customer staff must continue to manage and maintain the solution and all new

problems must be quickly identified and handled appropriately. This also helps ensure that the customer experience is maintained and leads to repeat business in the future with that customer.

What is the ideal situation?

- All completed projects are handed over to the customer staff successfully.
- All customer technical training is complete.
- All documentation is delivered and contracts are complete.
- All relevant project data is captured in the knowledge management system.

Acceleration Partner

Document and follow a standard project handoff process from delivery to support and delivery back to sales internally.

What are the leading practices?

- Develop a handover process and related templates.
- Develop a formalized customer acceptance plan to ensure the solution meets the customer's original expectations.
- Define what tests will be performed and articulate what documented results will be used as success criteria.
- Develop a documentation binder that is used both as an implementation phase deliverable for the customer and as a tool when handing off the solution to the customer's operational support staff.
- Hold a customer meeting that defines the criteria for operational support after the handover.
- Write and include as-built documentation as part of the handover materials.

What are the measurable key performance indicators or skills required?

- Operational documentation creation and knowledge transfer
- Mean time to handover following project
- Number of help desk calls needed to support transition
- Hours of post implementation support needed
- Customer certifications and completed training activities

Optimization Partner

Design a project transition and integration strategy with customers. Use best practices from ITIL or from Cisco to define services relating to policy and procedure development and systems operations and optimization.

Discovery/Readiness Framework

What is it?

To develop a solid, high-level services delivery plan that will support the solution design, first fully evaluate the Cisco technologies that address the customer's business needs, then assess the customer's network and sites and determine if there are gaps that will affect the solution.

Why is it important?

A services delivery plan based on gap analysis and readiness assessment will ensure a smooth, on-time deployment and will ensure that all pertinent data are collected and related activity is built into the plan.

What is the ideal situation?

The services delivery team fully understands the customer business and technical requirements, establishes a high-level design, and demonstrates that the high-level design addresses the customer's requirements for every engagement.

What are the leading practices?

- Develop a discovery and readiness methodology and a comprehensive set of supporting tools that maximize operational efficiencies and service delivery consistency across all engagements.

Emerging Services Partner

Read and integrate the Cisco Lifecycle Services methodologies into your operating procedures.

Acceleration Partner

Establish fee-based service offerings that can be positioned to assist customers in the assessment and business justification of a particular solution.

- Use systems requirements validation tools to ensure site readiness.
- Create, implement, and maintain standard policies through a knowledge management portal or an operations portal.
- Application readiness assessments conducted for every engagement
- Wireless LAN assessments conducted for every engagement
- Operations readiness assessments conducted for every engagement

What are the measurable key performance indicators or skills required?

- Site surveys conducted for each engagement
- Site readiness assessments conducted for every engagement
- Network readiness assessments conducted for every engagement

Transformation Partner

Provide technology integration and migration planning services for customers implementing horizontal or vertical IT transformations.

Design Framework

What is it?

Create a detailed solution design that defines how your team will meet the networking, application, support services, backup, and recovery requirements; migration strategy, test plans, and training plans; and device configurations (which parameters and features to turn on or off and which protocols to use) for the delivery of the solution.

Why is it important?

Creating a pre-implementation design plan that everyone agrees on promotes confidence and trust from the customer and ensures customer satisfaction. Developing a detailed

design is essential to reducing risk, delays, and the total cost of network deployments. A design aligned with the customer's business goals and technical requirements can improve network performance while supporting high availability, reliability, security, and scalability.

What is the ideal situation?

At the conclusion of this step, a detailed solution design is delivered, all aspects of the solution as agreed are fully implemented and operational, and all staff is fully trained.

What are the leading practices?

- Develop a comprehensive design framework and toolkit that maximiz-

Acceleration Partner

Create and use standard design deliverable templates to create consistency in design deliverables.

es operational efficiencies and implementation consistency.

- Create, implement, and maintain standard policies through a knowledge management portal or an operations portal.

What are the measurable key performance indicators or skills required?

- A services delivery plan and initial solution incorporating customer-specific infrastructure and vertical considerations has been developed. This includes:
 - Physical design
 - Feature/function design
 - System design
 - Device level design
 - Operations design
 - Implementation plan
 - Operations plan
 - Migration plan
 - Staging plan
 - Staff development plan
 - Acceptance test plan
- Current state of the network is assessed to identify the potential im-

pact of the solution being implemented.

- Appropriate resources identified and available.
- Staff fully trained and prepared to carry out the design plan.
- Customer and quality assurance have signed off on the solution design.

Implementation Framework

What is it?

An implementation framework comprises the key activities associated with the actual implementation of a solution. This framework relies upon the availability of a complete solution design and a completed statement of work.

The focus of the implementation framework is primarily project management. This includes resource allocation, resource scheduling, logistics management, project communications, and the instantiation of all project deliverables within the parameters of the project budget and project timeframe.

The framework is managed through risk, change, and configuration management methodologies and processes as well as security management and supplier management.

Why is it important?

Customers want the new solution to be introduced into their network with the least amount of disruption and the highest level of functionality, within the timeframe and budget agreed to. Therefore, a well-established framework that takes into account all possibilities is critical for successful project implementation and customer satisfaction.

Emerging Services Partner

Be wary of engaging in implementation without having completed discovery, design, and testing of systems.

Acceleration Partner

Create implementation benchmarks and internal review processes to ensure that standard implementation practices are followed.

What is the ideal situation?

At the conclusion of this step:

- All systems are fully operational.
- The solution is aligned with the original business plan.
- All outages are identified and resolved within acceptable limits and any changes are implemented smoothly.
- Operations staff and users are fully trained.
- Responsibilities are transferred to the operations group.

What are the leading practices?

- Develop a comprehensive implementation framework and hand-off methodology and toolkit that maximize operational efficiencies and implementation consistency.
- Develop a model for the execution of implementation services through subcontracting and partnering.
- Create, implement, and maintain standard policies through a knowledge management portal or an operations portal.

What are the measurable key performance indicators or skills required?

- Services delivery ready content for implementation framework is available.
- Formalized customer acceptance criteria plan identifies tests to be conducted and what documented results will serve as success criteria.
- Implementation guidelines are defined for staging, hardware implementation, legacy integration, device deployment, system migration, and operation implementation.
- System acceptance testing is outlined for various stages of the implementation process.
- End-user training as well as administration and helpdesk training are established.
- As-built documentation is included as part of the hand-off.
- Number of projects successfully implemented on time and in budget.

Engagement Quality Assurance and Benchmarking

What is it?

Establish an engagement quality assurance model that includes customer feedback to ensure consistent and quality service delivery as well as identify and fix any problems.

Why is it important?

A well-developed quality assurance methodology ensures that the implemented solution fulfills or exceeds the customer's expectations. A satisfied customer is the best marketing tool you can have.

What is the ideal situation?

- Engagement quality assurance process in place.

- All engagements measured in terms of services delivery quality.
- All out-of-line quality situations dealt with speedily.

What are the leading practices?

- Develop a comprehensive quality assurance methodology and tool-set that maximizes operational efficiencies, customer satisfaction, and quality consistency.
- Develop the critical processes and tools necessary to create consistency between what is scoped and how the Cisco solution is installed and supported.

Acceleration Partner

Create a quality assurance methodology to provide a secondary review of design and implementation deliverables.

- Develop a change management process that outlines risk levels, escalation procedures, and parameters for which all changes are approved.
- Develop quality benchmarks against which your implementation process can be measured.
- Implement a change control board to review business impact, priority, and change readiness and to ensure that only authorized changes are implemented in an acceptable time frame and in accordance with business requirements.
- Problems and/or customer concerns handled in a timely manner and documented as part of the improvement process.
- Quality assurance procedures followed by all personnel to ensure consistency.
- Prior to scheduling a change, a risk level is assigned, a solution template is completed, and change requests are reviewed for completeness and accuracy.
- Change control board ensures changes are successful.
- No new incidents are created as a result of a change.

What are the measurable key performance indicators or skills required?

- Quality inspection process conducted at strategic points throughout the planning, service delivery, and implementation phases.
- Standardized quality reporting system ensures consistency and accuracy.
- Customer feedback forms distributed, collected, and thoroughly reviewed.
- Documented results that serve as success criteria are fully explained and agreed to by customer as acceptable benchmarks.

Optimization Partner

Create a separate quality assurance division or group with the focused purpose of auditing service delivery activities and comparing documented best practices to actual service delivery activities.

Customer Satisfaction Surveys and References

What is it?

Establish and conduct customer surveys. Measure customer feedback and use the data for references and marketing as well as for fixing problems.

Why is it important?

Customer survey results may be used to manage your business at a fundamental level in areas such as process improvement, process management, and product selection. In addition, satisfied customers may serve as references or offer referrals.

What is the ideal situation?

- Workable customer survey model in place.
- All customer feedback acted upon speedily and changes implemented in services delivery model.
- High customer satisfaction.

What are the leading practices?

- Conduct customer satisfaction surveys for every engagement.
- Create internal reference documents for every engagement.
- Request permission to use customer as a reference or referral for every engagement.

Emerging Services Partner

Capture customer feedback at the completion of all projects in a customer satisfaction process.

- Create and publish formal case studies for significant engagements.
- Collect and manage all reference documentation for reuse in customer proposals and marketing efforts.
- Create a single point of contact to manage survey creation, collection, and reporting.
- Customer communications process in place for every engagement
- Customer data collection system in place and operational
- Number of customer references created
- Number of customer case studies created

What are the measurable key performance indicators or skills required?

- Customer survey completed for every engagement
- Customer reference process conducted for every engagement

Optimization Partner

Establish a feedback mechanism that surveys all participants in a project, including internal, external, Cisco, and partner resources when applicable. Map the statistics from each group in a graph and analyze for performance enhancement opportunities.

Cisco Resources for Successful Professional Services Delivery

Partner E-Learning Connection (PEC):

LOCATION:

The Cisco Partner E-Learning Connection is the primary training source for all Cisco Partner learning and training.

PARTNER CENTRAL > PARTNER E-LEARNING (PEC)

Cisco Technology Training:

LOCATION:

Learn about Cisco technologies through the Partner E-Learning Connection site.

PARTNER CENTRAL > PARTNER E-LEARNING (PEC) > TECHNOLOGY CENTRAL

Services Assessment – Unified Communications:

LOCATION:

The Partner Services Assessment validates the Unified Communications service capabilities of partners as a requirement for achieving the Advanced Unified Communications.

PARTNER CENTRAL > CHANNEL PARTNER PROGRAM > SPECIALIZED PARTNER > ADVANCED UNIFIED COMMUNICATIONS > SERVICES ASSESSMENT

PDI Help Desk:

LOCATION:

The PDI Help Desk offers Cisco Unified Communication Partners additional support services resources during the network planning, design, and implementation phases.

PARTNER CENTRAL > CHANNEL PARTNER PROGRAM > SUPPORT YOUR CUSTOMER > PDI HELP DESK

SMB Support Assistance:

The Cisco SMB Support Assistant program provides access to Cisco SMB technical engineers, advance hardware replacement, operating system software maintenance, and access to the Cisco SMB Support Assistant client and portal, which simplifies the ability to set up, configure, troubleshoot, and open service requests with emphasis on easy-to-understand instructions.

LOCATION: PPRODUCTS AND SERVICES > SERVICES > TECHNICAL SERVICES > SMB SUPPORT ASSISTANT

Steps to Success:

Cisco's online resource providing industry leading methodology and access to presales and postsales technical reference materials, project plan and deployment templates, tools, leading practices, and case studies.

LOCATION: PARTNER CENTRAL > STEPS TO SUCCESS

Cisco Lifecycle Services :

Cisco Lifecycle Services help you deploy, operate, and optimize Cisco solutions to strengthen customer relationships and enhance profitability (*see Glossary*).

Through the Steps to Success Portal, you can access the Cisco Lifecycle Services. Start by selecting the appropriate technology / market segment option. You can view each of the lifecycle phases—Prepare, Plan, Design, Implement, Operate, and Optimize. Under each phase, there are service components describing various resources and tools to help you.

Plan Phase Tools include: Planning Questions, Communication Worksheet, Project Plan Template, Site Survey Template, Statement of Work Template, Customer Requirements Document, and Network Infrastructure Readiness Assessment Questionnaire.

Design Phase Tools include: Design Guide, Design Worksheet, Delivery Plan, Project Risk Report, PDI Help Desk Tool, Application Readiness Assessment, Implementation Plan Template, and System Acceptance Test Plan.

Implementation Phase Tools include: Implementation Project Plan, Staging Plan, Configuration Checklist, Equipment Order Log, Change Control Request, Technical Issues Log, End-User Training Guide, and Customer Sign-off Letter.

LOCATION: PARTNER CENTRAL > STEPS TO SUCCESS > VIEW PROCESS FLOWS

Professional Services Delivery: How Am I Doing?

Use the checklist below to determine your progress toward a successful services delivery effort.

Goal	Yes	No	In Progress
Delivery roles, responsibilities, and competencies are clearly defined.			
Policies are created, implemented, and maintained through a knowledge management or operations portal.			
Skills profile and training plan is in place for technical staff and project management leads, includes certifications.			
Compensation plan takes into account service delivery success as well as expertise, mentoring, and knowledge management.			
Capacity and allocation is budgeted according to forecast.			
Project service delivery model is established and followed that includes project delivery team structure, budget, roles, responsibilities.			
Project service delivery tools and templates are used to promote consistency.			
Procedures for addressing user problems, network outages, and overall case management are stored in knowledge portal.			
Weekly meetings are held to ensure communication between stakeholders and to outline the project health status.			
For each engagement, we conduct a site survey and the following assessments: site readiness, network readiness, wireless LAN, application readiness, and operations readiness.			
Based on assessments, a services delivery plan and initial solution is developed, trained resources are identified.			

Goal	Yes	No	In Progress
Customer and quality assurance are signed-off on the solution design before service delivery.			
Change request forms are used to execute changes.			
A change management tracking template is used to track and manage the change request.			
A change management process outlines risk levels, escalation procedures, and parameters for which all changes are approved.			
A change control board reviews business impact, priority, and change readiness to ensure only authorized changes are implemented in an acceptable time frame and in accordance with requirements.			
Prior to scheduling a change, a risk level is assigned, a solution template is completed, and change requests are reviewed for completeness and accuracy.			
Quality benchmarks are used to measure the implementation process.			
A quality inspection process is conducted at strategic points throughout the planning, delivery, and implementation phases.			
Standardized quality assurance procedures and reporting are followed by all personnel to ensure consistency and accuracy.			
Customer feedback forms are distributed, collected, and thoroughly reviewed.			
Problems and customer concerns are handled in a timely manner and documented as part of the improvement process.			
Documented results are fully explained and agreed to by customer as acceptable benchmarks.			
Customer satisfaction survey is conducted for every engagement.			
Formalized customer acceptance tools and templates that include success criteria are used for handover and closure.			
Customer meeting is held to define the criteria for operational support services after the handover and provide as-built documentation.			

Chapter 3.5



Guide to Successful Support Services

This chapter describes the key support services elements that can be offered to customers to ensure that the solution that has been sold and implemented will continue to operate and provide ongoing value to the customer. This service should also provide customers with additional value in terms of suggested improvements to the solution over time.

Key Performance Indicators to Measure the Success of Your Support Services

Attributes

Customers who require remote support services have a number to call.

All calls are handled rapidly and all issues are resolved within service level agreements.

All critical customer outages are addressed rapidly and all situations are resolved resulting in high customer satisfaction.

Onsite system administrators are fully trained in all aspects of the solution. End users are fully trained in required areas. Documentation is available to assist users.

All systems are fully operational; the solution is aligned with the original business plan; all outages are identified and resolved within acceptable limits; and any changes are implemented smoothly.

Support services staff is well organized and continually trained in the latest support techniques, Cisco programs, and hardware support services.

Customer experience is enhanced with the ongoing care and feeding of delivered solutions. Problems are resolved proactively and customer satisfaction remains high.

Trusted relationships are established with all key customers.

All support incidents are handled rapidly.

An interactive and ongoing relationship is established with customers to evaluate business needs and identify areas of opportunity to develop new solutions.

Competition is locked out and Cisco field sales organization is integrated into the feedback loop.

Building Blocks for Successful Support Services

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Support Services Skill Building and Allocation

What is it?

Focus is on the development of key skills and allocation of resources in the ongoing support of customer solutions. Areas of development include definition of competencies and responsibilities, creation of a development plan, and evaluation of the capacity and work allocation of resources.

Why is it important?

To ensure customer satisfaction and a working solution, it is essential to anticipate the support services staffing requirements, provide training tailored to the technical needs,

and reward employees for their contributions.

What is the ideal situation?

Support services staff is well organized and continually trained in the latest support services techniques, Cisco programs, and hardware support services.

What are the leading practices?

- Develop a support services staff training plan that clearly defines roles and responsibilities as well as required competencies
- Develop a program to provide ongoing training and certification or recertification on a regular basis

Emerging Services Partner

Identify key team members who will be providing support services and train them to the appropriate skills level.

Acceleration Partner

Integrate support training skills development into your overall training and skills development strategy.

- Allocation and training for both off-site and onsite support situations
- Retention plan that takes into account attrition, turnover, and reward is in place
- Capacity and allocation budgeted according to forecast

What are the measurable key performance indicators or skills required?

- Support services staff training plan in place and operational
- Support services staff competency assessment process in place
- Staff development plan from ramp-up to refresh that includes certifications is in place
- Capacity and allocation budgeted according to forecast

Transformation Partner

Cross-train internal support resources on the Cisco products that you will be implementing. Include problem resolution capabilities for nontechnical issues that may come up relating to transformation or integration activities.

Help Desk and Advanced Technical Support Services

What is it?

Provide a simple call-in support services offering for customers to use after the implementation of a solution. The help desk must have access to and knowledge about the project that was delivered.

Why is it important?

Once the solution is up and running, it is important for customer satisfaction to keep it functioning as efficiently as possible and with high availability, while resolving problems quickly as they arise. The help desk provides the ongoing primary contact point for maintaining the relationship with all customers.

What is the ideal situation?

Customers who require remote support services have a number to call. All calls are handled rapidly and all issues are resolved within service level agreements. Additional, add-on business opportunities are identified through the help desk.

What are the leading practices?

- Establish a call-in support services desk or help desk with trained and qualified staff.
- For large companies, consider establishing a multitiered help desk with the first-line help desk staff using an internal knowledge base.

Emerging Services Partner

Meet with your Cisco account team to establish minimum requirements for post-implementation support. Be sure you comply with all leading practices and program requirements.

Acceleration Partner

Utilize software tools to create a trouble ticket and tracking system for your business. Provide customers with training on how to log a ticket. Establish expectations as to service-level agreements and escalation procedures.

- Establish a tier-3 support services contract with Cisco to handle the widest spectrum of support services.
- Capture all support services information into a knowledge base for reuse and refinement.
- A system is in place to document, track, and monitor issues and their resolution.
- When the issue is resolved, required feature or function changes are documented, passed through the change control system, and as-built documentation is updated.

What are the measurable key performance indicators or skills required?

- Support services issues are segregated according to level of expertise required to resolve the issue in a tiered approach:
 - Tier 1: Initial identification, disposition, and triage of support services issues
 - Tier 2: Broad/general support services capabilities based on customer solution
 - Tier 3: Issue-specific expert support services capabilities
- Personnel are available and well trained at each tier level.
- The request for support services guidelines are established and communicated.
- A customer satisfaction survey process is in place.
- Time to resolution is captured and monitored for every support services incident.

Optimization Partner

Create documented policies and procedures for all support escalation and resolution activities. Integrate into online systems so staff will have access to materials in a real-time environment.

Onsite Support Services

What is it?

Provide availability of support services engineers who can respond rapidly to critical customer situations through onsite engagement.

Why is it important?

Onsite support services provides trained field engineers who can install replacement parts and implement Cisco technology expertise and practices to help ensure that the customer's solution operates at the highest level. In addition, it reduces the customer staffing needs.

What is the ideal situation?

All critical customer outages are addressed rapidly and all situations are resolved. Customer satisfaction is very high.

What are the leading practices?

- Establish a separate, dedicated onsite support services team, or implement an onsite support services team through a roster, to ensure that onsite support services resources are available at all times.
- Ensure that all qualified customers are fully aware of and follow a prescribed support services incident

Emerging Services Partner

Create packaged onsite support service contracts to set expectations with customers and add additional service revenue.

procedure that includes escalation to onsite support services.

- Ensure that a tier-3 support services contract is in place with Cisco for onsite support services staff to use when required.

What are the measurable key performance indicators or skills required?

- Field engineers are well trained and have the expertise to meet the customer needs.
- A system is in place to document, track, and monitor onsite visits and their resolution.

- When the issue is resolved, required feature or function changes are documented, passed through the change control system, and as-built documentation is updated.
- A customer satisfaction survey process is in place.

Transformation Partner

Create a support service that supports legacy equipment as well as Cisco equipment. Provide a monthly fee for on-call support with hourly rates for onsite support in an annual or month-to-month contract format.

Functional Knowledge Transfer

What is it?

Provide onsite, web-based or offsite training programs for your customers. Create application-specific custom training to assist customers in the successful adoption of new technologies.

Why is it important?

Successful knowledge transfer empowers customers with the knowledge and confidence they need to use the system effectively and accomplish their business goals. Satisfied customers will provide references and referrals for you.

What is the ideal situation?

Onsite system administrator is fully trained in all aspects of solution. End users are fully trained in required areas. Documentation is available to assist users.

What are the leading practices?

- Deliver detailed functional design documents after installation that thoroughly document solution infrastructure.
- Incorporate customer knowledge transfer as a part of every proposal and engagement.
- Establish a complete catalog of knowledge transfer content includ-

Acceleration Partner

Include formal knowledge transfer, documentation, and project handoff on all projects.

ing basic feature and function overview, advanced feature and function overview, self-help resources, and quick reference guides or how-to sheets.

- Leverage end-user training content and courses available to you as a Cisco partner to educate your customers on Cisco solutions.
- Create management and support templates that you can share with your customers.

What are the measurable key performance indicators or skills required?

- An administrator training plan is established and operational for every engagement.
- A standard process for end-user training is established.
- End-user training is included with every customer solution.

Optimization Partner

Integrate formal training and certification offerings by engaging other Cisco partners or selling Cisco training offerings to customers.

Network Monitoring

What is it?

This phase of support services is focused on monitoring, incident and problem management, change and configuration management, security management, and supplier management. This phase also includes business case alignment as well as technology and operations assessment.

Why is it important?

Network operations represent a significant portion of IT budgets, so it's important to reduce operating expenses while continually enhancing performance. Proactively monitor-

ing the health and vital signs of the network to improve service quality; reduce disruptions; mitigate outages; and maintain high availability, reliability, and security will ensure customer satisfaction.

What is the ideal situation?

At the conclusion of this step, all systems are fully operational, the solution is aligned with the original business plan, all outages are identified and resolved within acceptable limits, and any changes are implemented smoothly.

Emerging Services Partner

Work initially with a managed service provider (MSP) to provide monitoring and alerting services for your customers.

What are the leading practices?

- Define and implement network *Ready for Use* Certificate qualifications.
- Make onsite and remote network monitoring options available to all customers.

What are the measurable key performance indicators or skills required?

- Remote monitoring and access processes are in place.
- Alert forwarding process in place.
- Auto-ticket entry process in place.
- Phone home capability in place.

Optimization Partner

Integrate in-house managed services capabilities by partnering with a leading provider of managed services. Create your own managed service offerings for your customers.

Operations Framework

What is it?

Focus on the operational infrastructure necessary to support technology solutions. This includes service level monitoring, trouble tickets, incident management, change management, knowledge management, service requests, release management, problem resolution, root cause analysis, and satisfaction surveys.

Why is it important?

By providing an efficient framework and operational tools to respond to problems, a company can avoid costly downtime and business interruption. Expert operations also allow

an organization to accommodate upgrades, moves, additions, and changes while effectively reducing operating costs.

What is the ideal situation?

Customer experience is enhanced with the ongoing care and feeding of delivered solutions. Problems are resolved proactively and customer satisfaction remains high.

What are the leading practices?

- Develop an operational framework that is well defined and made available to customers as required.

Acceleration Partner

Establish a core operational framework that takes leading practices into consideration. Integrate it into all areas of your business.

- Establish and use back-end support systems and processes to support the operations framework.
 - Create, implement, and maintain standard policies through a knowledge management portal or an operations portal.
- What are the measurable key performance indicators or skills required?**
- Service level monitoring and reporting
 - Trouble ticket database
 - Incident and problem management process
 - Remedial remote troubleshooting procedures
 - Change management process
 - Service request process
 - Release management process
 - Service assurance plan
 - Field dispatch process
 - Onsite troubleshooting process
 - Escalation and notification process
 - Problem isolation lab
 - Root cause analysis process
 - Customer satisfaction survey process

Transformation Partner

Customize your operational infrastructure to support your unique offerings. Position this capability as a value-added component during your sales process specifically toward the customer or solution verticals you focus on.

Technical Account Management

What is it?

Provide a proactive support services engagement offering that includes a dedicated technical account manager who will not only ensure that all support services calls are quickly addressed, but also offer ongoing technical training and assessment of the customer support environment to avoid potential outages. This technical account manager will also operate as a “trusted advisor” for the customer and will position additional services and solutions to the customer.

Why is it important?

A technical account manager who is familiar with the environment, business goals, business needs, and system processes will help customers make maximum use of their new system right from the start. As a result, customers quickly realize the full value of their investment and satisfaction is high.

What is the ideal situation?

- Trusted relationships established with all key customers through the technical account manager.
- Dedicated technical account manager resource available to all key customers.

Emerging Services Partner

Designate a key services support person as the customer technical account manager for each customer engagement.

Acceleration Partner

Interface with Cisco service and support managers to collaboratively support customers on an ongoing basis.

- All support services incidents handled rapidly.
- Repeat business is high.
- Ensure that technical account manager has excellent communication and management skills as well as technical knowledge.

What are the leading practices?

- Position the role of a technical account manager to the customer in terms of ongoing business value, early in the sales cycle.
- Sell a technical account manager engagement to every large customer.
- Ensure that the technical account manager understands both the business needs of the customer and the technical aspects of the implemented solution.

What are the measurable key performance indicators or skills required?

- Technical account managers engaged on every large customer engagement.
- High long-term customer satisfaction.
- High incidence of repeat business from customers with technical account managers.

Optimization Partner

Integrate sales and technical account management to create a continuum of account review, solution development, and opportunity development. Align compensation plans to encourage the collaboration of technical and sales focused team members.

Long Term Support Services

What is it?

Provide a comprehensive support offering that includes help desk, onsite and remote support services, end-user training, and network monitoring together with upgrade assurance for the hardware, the software, and the solution.

Why is it important?

By adopting a variety of approaches to support services, you can ensure customer satisfaction and long term relationships, which leads to referrals and references.

What is the ideal situation?

All key customers are fully supported. Long term relationships established with all key customers.

What are the leading practices?

- In addition to individual support services options, offer customers the option of a complete, end-to-end support services package.
- Create, implement, and maintain standard policies through a knowledge management portal or an operations portal.

Acceleration Partner

Create a menu of ongoing support services you can sell to your customers that includes long-term and total outsourced service offerings.

What are the measurable key performance indicators or skills required?

- Service level monitoring and reporting
- Trouble ticket database
- Incident and problem management process
- Remedial remote troubleshooting procedures
- Change management process
- Service request process
- Release management process
- Service assurance plan
- Field dispatch process
- Onsite troubleshooting process
- Escalation and notification process
- Problem isolation lab
- Root cause analysis process
- Customer satisfaction survey process

Optimization Framework

What is it?

Establish an ongoing technology and business requirements feedback loop with customers to optimize their relationship and return on investment.

Why is it important?

Many customers initially implement a very small percentage of the solution capabilities and thus do not fully leverage the benefits. Therefore, it is important to assess all aspects of the solution in terms of ROI and business needs and provide a long term plan for full optimization of the solution. By conducting an optimization workshop, you eliminate account

erosion and establish better account control and relationships.

What is the ideal situation?

Partner and customer have an interactive and ongoing relationship to evaluate business needs and identify areas of opportunity to develop new solutions. Competition is locked out and Cisco field sales is integrated into the feedback loop.

What are the leading practices?

- Develop an automated methodology and process to conduct an ROI analysis and ROI report that shows the customer the productivity and business initiative gains resulting from the solution.

Emerging Services Partner

Engage in post-implementation sales discussions with technical resources to identify project opportunities in customers.

Acceleration Partner

Provide solution lifecycle information to customers, encouraging them to consider an ongoing technology refresh and development plan. Engage in regular discussions to determine next steps and plan for future implementations.

- Conduct a technology, operations, and security assessment. Review the output to assess whether the solution maximizes the desired business results and if opportunities for optimization exist.
- When significant deviations are identified, offer optimization recommendations for the current solution, to minimize or eliminate impacts and to maximize business results delivery.
- Create, implement, and maintain standard policies through a knowledge management portal or an operations portal.
- Host a customer optimization workshop to review business case alignment; to discuss technology, operations, and security assessments; and to prove the value of the solution.
- Cisco suggests the automation of the basic framework within the Optimize phase that specifically addresses basic skills, attrition, discovery, ROI analysis, and roles and responsibilities.

What are the measurable key performance indicators or skills required?

ROI analysis and report focused on improved employee productivity and a keen comparative advantage.
Customer satisfaction survey process

Transformation Partner

Work with the Cisco field team to establish benchmarks for successful implementations and set proper expectations with customers as to the expected ROI and operational benefit of the solution implemented.

Cisco Resources for Successful Support Services

Support Your Customer:

Use Cisco resources to provide enhanced post-sales support services.

LOCATION: PARTNER CENTRAL > SUPPORT YOUR CUSTOMER

Leading Practice for Partners: Using Cisco Resources for Support:

This leading practice document provides descriptions of “best in class” practices and detailed action plans for accessing and implementing Cisco tools and strategies.

LOCATION: PARTNER CENTRAL > STEPS TO SUCCESS > VIEW PROCESS FLOWS > OPERATE PHASE

Cisco SMARTnet:

Cisco SMARTnet and SMARTnet Onsite helps you improve productivity, increase operational efficiency, and extend the life of your network assets.

LOCATION: PRODUCTS AND SERVICES > SERVICES > TECHNICAL SERVICES > SMARTNET

Cisco SMARTnet Onsite:

Cisco SMARTnet Onsite offers the option of a Cisco field engineer who will come to the customer’s site to install replacement parts or troubleshoot network problems.

LOCATION: PRODUCTS AND SERVICES > SERVICES > TECHNICAL SERVICES > SMARTNET ONSITE

Partner Online Help:

Partner Help Online is a direct support path for any partner issues, including complete presales, technical, and product design assistance.

LOCATION: PRODUCTS AND SERVICES > SERVICES > TECHNICAL SERVICES > SMB SUPPORT ASSISTANT

Building Support Skills and Allocation Leading Practice:

This leading practice guide provides a more detailed look at the leading practices, techniques, and strategies associated with effective support skills and allocation.

LOCATION: PARTNER CENTRAL > STEPS TO SUCCESS > VIEW PROCESS FLOWS > OPERATE PHASE

Cisco E-Services Training:

Cisco’s online training program is designed to deliver training to Cisco and partner engineers.

LOCATION: TRAINING AND EVENTS > TRAINING RESOURCES > CISCO E-SERVICES TRAINING

Technical Support Training Resources:

Learn how to use the Cisco Technical Support & Documentation Website to find critical technical documentation and online tools to help you troubleshoot issues, enhance your networking skills, and support your networks.

TRAINING AND EVENTS > TRAINING RESOURCES >

LOCATION: TECHNICAL SUPPORT TRAINING RESOURCES

Building a Support Framework:

This leading practice guide provides a more detailed look at the leading practices, techniques, and strategies associated with developing an effective support framework.

LOCATION: PARTNER CENTRAL > STEPS TO SUCCESS > VIEW PROCESS FLOWS > OPERATE PHASE

Monitoring Networks Leading Practice:

The overall purpose of this document is to provide practical recommendations on each functional area (fault, configuration, performance, security and accounting management) to increase the overall effectiveness of current management tools and practices. It also provides design guidelines for future implementation of network management tools and technologies.

LOCATION: SUPPORT > TECHNOLOGY SUPPORT > AVAILABILITY > HIGH AVAILABILITY > TECHNICAL WHITE PAPERS > NETWORK MANAGEMENT SYSTEM: BEST PRACTICES WHITE PAPER

Advanced Services by Technology:

Cisco Advanced Services drive technology integration while lowering your operational costs, increasing network availability, and optimizing performance.

LOCATION: PRODUCTS AND SERVICES > SERVICES > ADVANCED SERVICES BY TECHNOLOGY

Cisco Unified Communications Services:

Using the Cisco Lifecycle Services approach, Cisco and its partners provide a broad portfolio of Unified Communications Services that address all aspects of deploying, operating, and optimizing your network.

LOCATION: PRODUCTS AND SERVICES > SERVICES > ADVANCED SERVICES BY TECHNOLOGY > CISCO UNIFIED COMMUNICATIONS SERVICES

Remote Operations Services:

Cisco Remote Operations Services provides cost-effective management of Cisco Advanced Technologies to help you solve complex performance issues and lower expenses.

LOCATION: PRODUCTS AND SERVICES > SERVICES > REMOTE OPERATIONS SERVICES

Discovery Tool:

Partners can use output from this tool to make recommendations on network optimizations, upgrades, and replacements.

LOCATION: PRODUCTS AND SERVICES > CHANNEL PARTNER PROGRAM > SELL TECHNOLOGIES AND SERVICES > THE DISCOVERY TOOL

Steps to Success:

Cisco's online resource providing industry leading methodology and access to presales and post-sales technical reference materials, project plan and deployment templates, tools, best practices, and case studies.

LOCATION: PARTNER CENTRAL > STEPS TO SUCCESS

Cisco Lifecycle Services:

Cisco Lifecycle Services help you deploy, operate, and optimize Cisco solutions to strengthen customer relationships and enhance profitability (see Glossary). Access them through the Steps to Success Portal. Start by selecting the appropriate technology / market segment option. You can view each of the lifecycle phases: Prepare, Plan, Design, Implement, Operate, and Optimize. Under each phase, there are service components describing various resources and tools to help you.

Operate Phase Tools include: Operational Practices, Performance Monitoring, Renewal Leading Practice Document, Support Escalation Leading Practice Document, TAC Service Request Tool, Technical Issues Log, Capacity Management, Operations Support Guide, and Troubleshooting Tech Notes.

Optimize Phase Tools include: Optimization Workshop, Performance Monitoring, and Technical Support and Documentation.

LOCATION: PARTNER CENTRAL > STEPS TO SUCCESS > VIEW PROCESS FLOWS

Support Services: How Am I Doing?

Use the checklist below to determine your progress toward a successful support effort.

Goal	Yes	No	In Progress
Call-in support desk or help desk is available with trained and qualified staff.			
Service request process and trouble ticket database are established.			
All support information is captured in a knowledge base for reuse and refinement.			
Support issues are segregated according to level of expertise required to resolve the issue in a three-tiered approach.			
Personnel and field engineers are available and well trained at each tier level and for onsite support.			
Resolved issues, required features, or function changes are documented, passed through the change control system, and as-built documentation is updated.			
An escalation and notification process is in place.			
A customer satisfaction survey process is in place.			
Time to resolution is captured and monitored for every incident.			
All qualified customers are fully aware of and follow a prescribed support incident procedure that includes escalation to onsite support.			
A system is in place to document, track, and monitor onsite visits and their resolution.			
A standard process for end-user training is established and is part of every proposal and engagement including a catalog of available training and Cisco resources.			
An administrator training plan is established and operational for every engagement.			
Network Ready for Use Certificate qualifications are defined and ready for implementation.			

Goal	Yes	No	In Progress
Onsite and remote network monitoring options and access processes are made available to qualifying customers.			
Alert forwarding, auto ticket entry, and phone home processes are in place.			
Support staff training plan that defines and assesses roles, responsibilities, and competencies is operational and includes certifications.			
Standard policies are created, implemented, and maintained through a knowledge management or operations portal.			
Back-end support systems and processes are available to support a well-defined operations framework.			
Service level monitoring and reporting is in place.			
Remedial remote troubleshooting procedures are defined.			
Release management process is in place.			
Problem isolation lab is available when necessary.			
Root cause analysis process is well established.			
ROI analyses and ROI reports are generated to show customer productivity and business gains from solution.			
Customer optimization workshops are held to review business case alignment; to discuss technology, operations, and security assessments; and to prove the value of the solution.			

Section 4 Additional References



Glossary of Terms

Key Performance Indicator (KPI):

Financial and nonfinancial metrics used to assess the present state of business and to prescribe the course of action.

Lifecycle Services:

The Cisco Lifecycle Services approach defines the minimum set of activities needed, by technology and by network complexity, to help you successfully deploy and operate Cisco technologies and optimize their performance through-out the network lifecycle. The stages are summarized below:

Prepare: Make sound financial decisions

- Establish financial justification through a business case
- Reduce later rework by developing a high-level, conceptual architecture, aligned with both Key Performance Indicators to Measure the Success of Your Cisco Relationship

Plan: Set the stage for smooth, on-time deployment

- Assess your network and sites and determine if there are gaps that will affect the solution
- Develop a project management plan

Design: Reduce risk and rework, speed successful implementation

- Develop a comprehensive detailed design that meets business and technical requirements developed in Prepare phase and assessment readiness developed in the Plan phase

Implement: Speed return on investment by leveraging the work done in the previous three phases

- Integrate devices without disrupting the existing network or creating points of vulnerability

Operate: Maintain high availability, reduce expenses

- Which includes maintaining network health through day-to-day operations

Optimize: Improve performance, availability, capacity, and security

- Achieve operational excellence through ongoing improvement of system performance and functionality

Specialization levels:

Cisco provides three levels of specialization to develop sales, technical, and services expertise in a particular technology.

Express Specialization: Two Express Specializations are available. The Cisco Express Foundation Specialization provides integrated training on routing and switching, wireless LAN, and security technologies. This training is required for all Premier and Silver Certified Partners. The Express Unified Communications Specialization is also available qualifying you in the area of converged data/voice/video networking.

Advanced Specialization: Partners can achieve Advanced Specialization in unified communications, security, wireless LAN, and routing and switching technologies. Your certification level determines how many specializations are required.

Master Specialization: Partners with a highly qualified practice in a given technology can achieve Master Specialization, regardless of certification level. This enables you to deliver more complex business solutions, and the new Master Specialization branding provides more opportunities for differentiation.

Certification levels:

Cisco provides three levels of certification. Certification level directly reflects your technology skills breadth across key technologies, to ensure your ability to deliver integrated solutions.

Premier Certification requires the Express Foundation Specialization.

Silver Certification requires the Express Foundation Specialization, plus either of the two following options: Any two advanced specializations; Express Unified Communications Specialization plus one advanced specialization, excluding the Advanced Unified Communications Specialization.

Gold Certification requires all four of the following: Advanced Routing & Switching, Advanced Security, Advanced Unified Communications, and Advanced Wireless LAN Specializations.

Incentive Programs:

Cisco currently offers three incentive programs.

Opportunity Incentive Program (OIP): An incentive program designed to provide economic incentives for partners that actively identify, develop, and close new business opportunities.

Solution Incentive Program (SIP): Rewards partners that integrate Cisco into their differentiated business solutions. The program offers eligible partners financial incentives and better engagement opportunities with Cisco sales teams.

Value Incentive Program (VIP): Rewards partners with high customer satisfaction. Promotes the value of integrated Cisco infrastructure advantage.

Leading Practice Guides:

A series of documents that provide leading practices for a specific business focus in the areas of marketing, sales, delivery, and support. In addition to leading practices, each document includes an action plan you may follow to effectively build the leading practice into your business.



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