

AJ (Adam Joseph): Can we start by talking a little bit about the current landscape at Cisco. I think many people like myself traditionally think of Cisco as very much a hardware business but today it's a mix of both hardware and software; is that right?

PF (Paul Ferguson): That's totally correct yes. For years people have thought about Cisco as the “*plumbing of the Internet*” (i.e. providing routers and switches) but over time people will now see that Cisco is very much software company. A big proportion of our income is now based on recurring revenues and a lot of the solutions that we offer are purchased as subscriptions. We are pivoting our business to support that subscription model so we're very much a software organisation and that's reflected in what we're doing within our Customer Success business.

AJ: Can you tell us about your role at Cisco as a “Partner Success Manager” and how you support the Partners that you work with?

PF: Of course I can. **I think if you're an organisation that claims to be “partner centric” then you've got to have processes in place to help you or your partners be successful and that's effectively what we do.** Cisco has a Customer Success organisation which is part of our Customer Experience business and we have a team of CSMs that work with our clients and they drive adoption of our offerings and help clients achieve their business outcomes. However, as a partner centric organisation we have a large proportion of our business (about 90%) transacting through Partners and we owe it to them to help them pivot for the transition.

AJ: Who is a typical Partner that you work with? Are they resellers, solution providers or something else?

PF: Our partners are quite diverse; we have very large organisations such as service providers and “classic” resellers (i.e. network integrators) but we also have smaller, more agile B2B partners that focus on specific offerings that we have. In other words, we have a wide range of partners in the resell space. We also have ecosystem partners that are professional services only organisations; they deliver their own services, either directly to customers or as an outsourcer for partners and many of those organisations are developing adoption services as well. So within our role as Partner Success Managers we've got quite a diverse range of partners from the very large outsourcers, solution providers and then right down to the very small (e.g. 10 person) organisation focusing on services.

AJ: Given that you're reliant on your partners to deliver outstanding levels of Customer Success, how can you make sure that are representing Cisco in the best possible way?

PF: It's a really interesting challenge because there are around 30 or 40 of us Partner Success Managers around the globe but there are tens of thousands of partners so you're naturally not going to scale to all of them. What we tend to do is start with a subset of partners who we will focus in on. These are organisations for whom building a Customer Success Practice is at the core of what they do.

As a team of Partner Success Managers we work with that subset of partners and we'll get them on the journey and then we'll start to bring the others along. We also have a digital platform via a Digital Experience and Analytics team and we have a program called "Lifecycle Advantage", which is a really powerful tool that our partners can utilise because what that enables them to do is digitise their touch to a wider pool of customers. This can be configured to send co-branded communications including "adopt and expand" messaging throughout the entire lifecycle of the customer. That's a great way of giving them the ability to scale and ultimately helps us as well.

AJ: So to pick up on that point, trying to deliver Customer Success at scale is a challenge that many people will resonate with. Are there any other tips or techniques that you could suggest you think might really help?

PF: I think the first thing you've got to do is recognise that you won't scale with just a team of high touch Customer Success Managers. **There are a number of very intensive activities that you do with customers and if you're trying to reach all of them then your Customer Success Managers won't scale. This is where I believe virtual and digital teams come in.** So my tip would be to consider those two. If you consider the optimum number of customers that a Customer Success professional can manage - it varies between organisations but let's assume there's an optimum of 10 to 15 customers that a high-touch CSM can successfully manage at any one time. Those virtual teams can use the technology they have available to reach more customers and they can also utilise the infrastructure and the digital experience platforms as well. Each virtual team member can reach maybe up to 100 customers by driving virtual adoption and then you can develop total digital touch models which is what we have within our digital experience team and which we have available for our partners through the lifecycle advantage process.

AJ: Given that Cisco support both hardware and software, does your Customer Success strategy change dependant on what the customer utilises?

PF: **Our strategy doesn't change and the reason why is because it doesn't matter who the customer is or how you're interacting with them, there's an experience there. Whatever you're doing, there's an experience that you have to influence, there's a customer that it's invested in you and you need to invest in them to make sure they get value from the purchase.**

So regardless of the go-to-market model or whether it's a combination of hardware and software, that customer still has an outcome, they still have a business problem they're trying to solve and it's the Customer Success Manager that is going to help solve the business outcomes. It doesn't really matter what the offering is; we could be we could be talking about fridges for example, there's a business outcome there (to keep food/drink nice and chilled) so it doesn't it doesn't matter whether you are supporting hardware of software.

AJ: One of the methods Cisco uses to maximise partners ROI is by adopting the VALUE (Value, Awareness, Learnings, Utilisation, Embed) framework. Can you tell us more about it?

PF: I can Adam but just to preface that, if you have many Customer Success Managers and a lot of clients, they will all be at different stages of their life-cycle with you. **You need to ensure that your customer has a consistent experience with you where regardless of wherever they are on the life-cycle.** We realised as we were scaling up that we needed to put that into place and so that's where the VALUE framework was developed.

The framework it is effectively a codified set of business practices and interventions that a Customer Success Manager can take along the life-cycle with the customer. It's been validated and benchmarked and it's been proven; we have run tens and thousands of engagements using the framework. The other cool thing about the framework is you can use it as a generic model to drive the adoption of a number of different solutions.

It begins right at the start of the customer journey, we are **validating** what their expected outcome is. We are validating what they expected to achieve when they made the investment in the solution. We are looking at the ways they're going to measure the ROI of that solution and we're validating the impact of that solution has on the customer, their employees and their stakeholders. So we're really validating the customers' business outcomes through their lens.

We then move on to the **awareness** stage; this is around building awareness of the solution within the customer because in many cases that organisation doesn't understand the capabilities that they've got. A solution has been provided, procured and delivered and the customer has no idea what it's for or how to use it. So the awareness stage is around building the knowledge of the capabilities they've got in relation to what they do. It's also making sure that they understand the change that's required of them to become successful in their roles/persona and then you move onto the learning phase.

This is around developing **learning** plans and working with your customer to develop them and ensure that users understand how they're going to consume the capabilities within your solution. This is about the kind of features of the software they're going to use, it's helping them to understand how that's going to help them do their job better (i.e. faster, quicker, more profitable) and then making sure within the learning plan that they're actually putting that into practice.

We move next to the **utilisation** phase which is where you're looking at the usage of the solution and you're feeding that back into the customer and you're using that to drive further adoption. In many cases, the I.T. community is happy that these solutions have been deployed only to find that platform usage is low. It's really about going back to the “validate” stage and trying to help them achieve that business outcome by driving utilisation. We're talking about the barriers to adoption; why might that usage be low? Could it be that the users are still not comfortable on how to apply that technology and in their job? So do we need to revisit the learning plan to help overcome those barriers to adoption?

That brings it around to the **embed** phase. What we're trying to is move to the point where the users are adopting the solution so successfully that it becomes embedded within their business process. It becomes part of their business capability so that they are actually getting maximum value in line with that ROI that you validated right at the start of the process.

That's what the value framework is; it is built and proven. Again, because we're helping our partners along the journey we are making the framework available to them to help them put structure around their adoption practices.

AJ: Going back to the validation stage, what advice do you have for anyone dealing with customers who have had their expectations previously wrongly set (e.g. during the pre-sales process) and now have unrealistic expectations?

PF: I think this is where we should tie it back into the awareness of the capabilities of the solution. **The role of a Customer Success Manager is to really understand those outcomes and then match them to the capabilities of the features.** The Customer Success Manager will validate these outcomes both internally and externally. They will talk to the Account Teams, they will get access to the original business case and get a really good understanding of what that business outcome is.

When the CSM is out in front of the customer they're validating the use case rather than asking what the expected business outcomes are. They're trying to understand whether the business outcomes are still the same or whether they've changed. In many cases these will differ because the customer's organisation has changed (i.e. due to acquisition or growth). It's really about re-baselining the outcomes and the expectations versus the capability; if there's a misalignment, then you know the expectation is that through the validation and awareness stages you are actually identifying potential expansion opportunities that you may be able to leverage with them further on in the adoption journey.