Customer Success Practices Playbook for Partners

2025
Version 3.4

Questions?
Contact: IBM.Partner.Customer.Success@ibm.com

Table of Contents

Navigating this document

This document is best viewed using the navigation pane in your PDF reader. Be sure to show the sidebar and select “Table of Contents”. Expanding the Table of Contents sections will allow you to quickly jump to areas of interest.

There are hyperlinks throughout that will bring you to other sections in the document as well as valuable external resources.

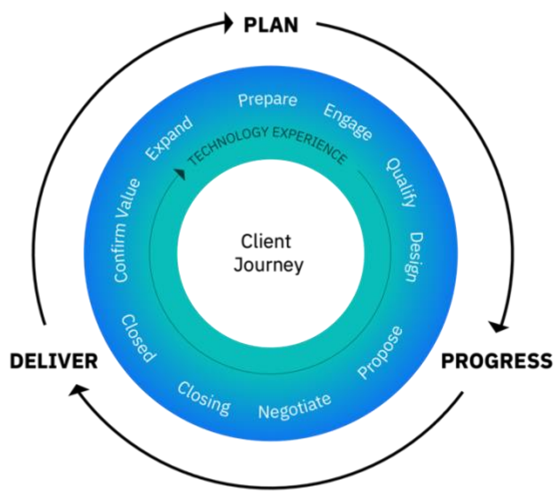
Getting Started

The IBM Client Engagement Model (ICEM) is the single IBM sales approach for engaging with clients to drive consistency and enhanced business results. All teams execute the model in alignment with the client's transformation journey.
ICEM has three phases of customer engagement:

Plan: Map client goals and strategies to IBM technology and sales plays.

Progress: Propose a compelling reason to act, negotiate terms and prices, and close a sales opportunity.

Deliver: Deliver value on the client expectations identified in the planning phase.

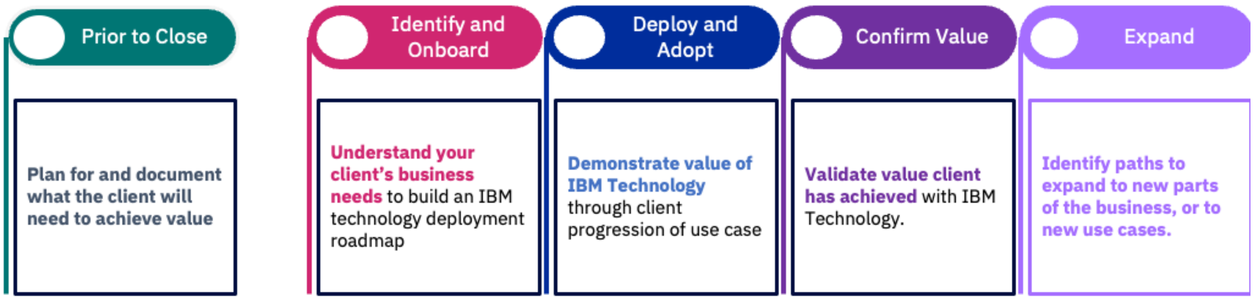


As a CSM, your impact is greatest in the Deliver phase; however, you need to engage with the Account team before the Close of a sale to share your knowledge of the client and so you have a better understanding of what is sold. You have input in the Design phase of the Sales cycle.

Adoption Engagement Model

The Deliver phase is focused on delivering value on the client expectations that were identified in the planning phase. This means successful implementation and adoption to ensure the client can quantify the business value of their purchase decision. Client retention and loyalty are the levers that provide additional opportunities to scale and expand.

Adoption Engagement Model



Phase	Actions	Resources	Teams	Outcomes
Before Close	- Participate in Account Planning - Understand what was sold - Learn about the customer	- Validated sizing and high-level design - Transition documentation - PoX delivered (as needed) - High-level deployment plan	- Partner Account Team - IBM Account Team (if applicable) - Customer Success - Professional services	- Account Plan - Initial use case
Identify & Onboard	- Introduction to client - Confirm client business - Objectives & use case - Validate MVP - Install/provision product - Document value realization metrics - Educate dev team - Welcome nurture (PLG)	- CSM Playbook	- Partner Account Team - IBM Account Team (if applicable) - Customer Success - Professional services	- Growth Plan - Business Outcome metrics - Prioritized use cases - Go-live forecast date

Deploy & Adopt	- Iterate & grow the MVP - Architect solution - Install & configure production environment - Integrate to backend - Test solution - Deploy to production - Implement Day 2 Ops - Educate ops team - Share deployment guides (PLG) - Outreach when zero or novice features implemented (PLG)	- Modernization Guides - TechZone - CSM Technical Playbook - IBM Documentation	- Partner Account Team - IBM Account Team (if applicable) - Customer Success - Professional services	- Running MVP - Production architecture design - Workload in production - Hardened solution
Confirm Value	- Assess value realized - Renew entitlements - Encourage use of additional features	- EBR - NPS	- Partner Account Team - IBM Account Team (if applicable) - Customer Success - Professional services	- Renewals - Feedback
Expand	- Identify new use cases & business opportunities - Assess success indicators - Review Retention Plan - Work with renewal reps	- Client Value Acceleration (Diamond only) - Use Case Discovery - Business Outcome	- Partner Account Team - IBM Account Team (if applicable) - Renewal reps - Customer Success Technology	- Growth Plan - Prioritized use cases - New entitlements - Updated client account plan - Client advocacy

Responsibilities of Customer Success

After the product is sold and you are in the Deliver phase, you will work within Gainsight to manage your activities, and you will follow the Deployment stages.

CSM responsibilities

- **Onboard** Identify compelling use cases that leverage IBM technology to solve a client's business challenges. Engage the business sponsor, run workshops, and install/onboard the product.
- **Deploy** Co-create with the client on architecture, deployment plans, and value-driven MVPs. Enlist resources for successful production implementation, including resources from your own organization or IBM teams to help.
- **Adopt** Guide the client through the use of existing content and processes (support, documentation, etc.). and conduct workshops, demos, and EBRs.
- **Confirm value** Ensure successful deployment, adoption, and renewal of IBM technology.
- **Expand** Discover expansion opportunities within and across the product or service the client is using. Connect to renewal and sales teams and run retention plans when needed.

CSMs stay with the customer through the life of the contract to grow the account. They look for expansion opportunities within and across the product or service the customer is using and bring those insights to the broader account team. CSMs also partner with renewals and sellers to ensure the customer has a seamless renewal experience.

You may also partner with IBM CSM Technical Specialists or Brand Technical Specialists (depending on the products). IBM CSM Technical Specialists are technical experts in their product specialty that help clients architect, install, onboard, and use those products. IBM Brand Technical Specialists primarily drive pre-sales motion through initial use case identification. Tech sellers lead the conversation for expansion (up-sell and cross-sell) opportunities and conduct enabling workshops and discovery sessions.

CSM Tools

Using the right tools will help you to be more productive and efficient.

Gainsight
Gainsight is the main tool for CSMs as you help customers adopt, use, and obtain maximum value from IBM offerings to ensure a positive customer experience. In Gainsight, you can access the clients to whom your organization has sold IBM Software. There you can create success plans, document key updates, and communicate the health and deployment progress of each client. See Getting started with Gainsight for more information.

IBM Partner Portal
IBM Partner Portal is the single platform to optimize opportunity management, deal registration, and sales collaboration. Authorized members of the Partner organization can access Partner Portal to better understand customer activity and to deepen their knowledge about their customer.

Users can locate and connect with IBM sellers as well as research deals about to close to determine if CSM engagement is needed.

You may also need to access the CRM system your company uses to view sales opportunities and other information.

IBM Support
At times you will need to access IBM Support on behalf of your customer. IBM has consolidated all support access into a single landing page -- IBM Partner Support.

IBM eCustomer Care
eCustomer Care provides support for the IBM Distributed Software Web (DSW) applications and the Passport Advantage (PPA) Program. Questions regarding access, registration, software download, media access, reporting functionality, and the navigation of the DSW web sites should be directed to eCare.

For additional process information for PPA and “Software and services online” (for software purchased outside of PPA), see Process Help.

Product enhancements
IBM Ideas is your destination for an integrated view of submitted, voted, or commented on ideas for any IBM product supported by an Aha! product portal.

Learning
Access badge-based training to build your product knowledge and technical skills at the IBM Partner Learning Hub.

IBM Technology Zone
Experience multiple IBM technologies and products first-hand using best-of-breed technical “Show-Me” content and environments together in one place at the IBM Technology Zone.

Product Information
Seismic
Partner Technical Enablement Guides
IBM Documentation
IBM Cloud Pak production deployment guides
Access to entitlement key for Cloud Paks

Who to call for help

As you work with your customer, you might need assistance along the way. Each of the following teams can help as you engage with your customer. A best practice to help you understand the role each team member plays is to build a stakeholder map. Start building the map with the IBM team and expand it to include other members of your organization as well as customer contacts as you develop relationships.

IBM CSMs
IBM CSMs ensure end customers realize their intended business goals and outcomes by helping clients architect, install, onboard, and use IBM Software. They are accountable and responsible for deployment, adoption, and growth IBM Software and IBM Cloud for the customers to which they are assigned.

IBM Ecosystem Sales
The IBM Ecosystem Sales team consists of sales and technical pre-sales resources that can support your firm's sales opportunities. They can often put you in contact with other IBM resources to support your IBM business.

IBM Client Engineering
IBM Client Engineering (CE) provides a no-cost IBM multi-disciplinary team that will collaborate with you, an IBM partner, and with the customer to jointly innovate and rapidly prove solutions based on client business needs, leveraging IBM technologies. To request pre-sales assistance from IBM Client Engineering, you can work with your IBM Ecosystem sales team to submit a request.

IBM Technology Expert Labs
To augment the skills and expertise within your partner organization, IBM Technology Expert Labs can engage with customers to assist with installation as a paid engagement. They also offer billable services to accelerate deployment and adoption, typically working on complex use cases and migrations in customer environments. Work with your IBM CSM, if assigned, or IBM Ecosystem sales team to engage.

IBM Support
IBM Support provides technical support services for offerings across deployments and adoption stages. The support team develops and executes troubleshooting strategies. Partners can engage IBM Support through our consolidated entry point.

Your IBM Distributor
Your IBM Distributor is a key resource to add to your relationship network. Typically, distributors have resources that can provide technical assistance, deployment services, and incentives to partners. Many distributors offer educational webinars and demo content/environments. Some even have CSMs that share your goal to help customers realize the value of their IBM Software.

Work with your IBM CSM Focal to identify the team members that may be working with your clients. For additional needs, you may send an email to our IBM Customer Success team at IBM.Partner.Customer.Success@ibm.com.

Learn about your customer

Start by learning about your customer
You need to learn about your customer's industry, team, and technical landscape, to assess their starting point. Only then, can you provide them with the best possible experience with their IBM software.

Build a deep understanding of the customer's business

As you prepare to engage with your customer, you need to develop a baseline understanding of their industry, the top use cases for IBM software in their industry, and key competitors. This enables you to project confidence at your initial customer meeting.

Understand the customer's business case

When you meet with the customer, ask about their business case. Support them in creating their business case by providing clarity on successful outcomes. Leverage ROI calculators to develop a data-driven value statement and review customer references in your industry.

Resources are available in IBM Seismic to help you assess business impact and locate customer references.

Questions to consider as you learn about your customer
As you work with your customer, you need to understand the answers to many of the following questions. How you get the answers depends on where you are starting with your customer.

If they have a well-defined use case and a process for building new solutions that does not require enterprise transformation, you might find much of this information already exists. You can learn about it by talking to your sales team and through the customer information sites that you have access to.

If your customer does not have a clearly defined reason for using the product, you might have to help them define use cases using design thinking and technical discovery.

Regardless of the starting point, knowing the answers to these questions helps to guide your work with the customer.

Strategy, roadmap, and compelling reason to act	Offering capabilities

◊ What are the customer's strategic objectives and motivation?
◊ What are the customer's pain points and strategic opportunities?
    ◊ What are the most urgent pain points that will drive the customer action?
◊ What is the starting point for the customer?
    ◊ Was the product purchased as part of a financial deal?
    ◊ Is this a modernization, upgrade, or disruptive initiative?
	◊ How have you established your organization as the partner of choice and the IBM software as the technology of choice?
	◊ How can we demonstrate technical expertise?
	◊ How can the IBM technology allow your customer to innovate and differentiate themselves from their competition?
	◊ What new capabilities will be built for the customer using the IBM software?
	◊ How will you measure success? What are the key metrics used to measure impact?

Values and benefits	**Why IBM and Partner together?**
◊ What is the value proposition and benefit for the customers? ◊ What is the current state, the desired state and expected impact? ◊ Are the benefit statements specific to the customer, not just typical of an industry or market? ◊ Do the benefits address customer-articulated issues?	◊ How can you demonstrate our combined experience in the customer's industry? ◊ How does the industry expertise resonate with your customer? ◊ How are we uniquely position to deliver the solution? ◊ How does the competition relate to implementing the software for the customer?

Understand the industry
As you build a strategic relationship with your customer it is important to show you understand their industry. IBM Seismic has specific industry resources that will provide:

- Trends in the industry
- Typical use cases
- Challenges facing the industry

You can find a great deal of information on your customer through an internet search. Be sure to research their latest quarterly earnings, read through any recent press releases, and try to gauge the temperature of the customer environment.

Understand the product use cases
Review the IBM software entitlements for your customer and how they map to your customer's typical challenges.

- Review the product entry points
- Review product competitors so you are prepared for any customer concerns
- Understand the product roadmap for key upcoming changes. You may need to reach out to your IBM sellers or CSM counterparts for additional insight on the product roadmap.

Review the technical playbooks for the relevant products available on Seismic.

Schedule an introduction to the business sponsor
With your knowledge of the customer, you are now ready to work with your sales team or the IBM ecosystem team to secure an introduction to the customer sponsor.

Your business sponsor is responsible for driving innovation and change within the company. Not having identified a sponsor is one of the biggest derailment factors. You need to ensure you build the bridge to your sponsor as early as possible in the process.

If a sponsor was not secured during the sales cycle, use your knowledge of the customer, their industry, and their offering to identify possible roles to engage. Ask the account or IBM team to introduce you to individuals in those roles.

Meet your business sponsor

If an IBM CSM is involved with your customer, be sure to work with them upfront to discuss how you will collaborate to support your shared customer. After you have that mutual understanding, then engage the customer and be clear about your respective roles and value in the relationship.

Introduce yourself to the customer sponsor: Create awareness, position, engage
The steps below outline the flow to initiate a successful introduction.

1. Create Awareness - Introduce yourself to the customer and make them aware of the value you bring to their organization. You will present insights into the CSM engagement model and impact for customer.

Get started-> You might wish to contact your sponsor by email to create impact and interest to meet with you as soon as possible.

2. Position – Customer and CSM are aligned on the scope of deployment activities. You will share inspiring success stories (e.g., similar use cases, industry, technologies).

   Get started-> Create awareness about your CSM role and expected business impact for customer
   - Understand customer strategy, business case
   - Review entitlements and related challenges
   - Identify and prioritize CSM-led engagement initiatives
   - Clarify next steps

3. Engage – CSM engagement kickoff. You are onboarded and attending governance/product meetings, if applicable

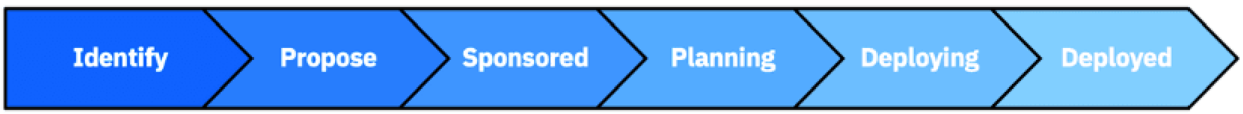
   Get started-> Plan a 45-minute meeting with your sponsor(s) to:
   - Refine, consolidate, and validate your focus
   - Establish a high-level engagement plan
   - Define scope of initiatives, priorities
   - Discuss a customer enablement plan with high level roadmap for adoption of solutions/technology
   - Establish communication framework

Next step: Identify the use cases and prioritize them based on customer goals, progressing through the Deployment Stages covered in the next section.

Deployment stages

Software deployments led by CSMs are tracked through Growth Plans in Gainsight. The projects progress through a standard lifecycle and are tracked by the Project Stage field on a Growth Plan.

Deployment stages in Gainsight
There are six stages of deployment. Within each stage there are various activities that you might perform to ensure successful deployment.



Stage	Description	Stage Exit Criteria
Identify	The use case is an early idea that you have identified based on previous discussions with the customer and understanding their strategy. When you are in this stage you have not yet had meaningful discussion with the customer.	You are discussing the use case with the customer.
Propose	The use case is being positioned with the customer. All projects in this stage should have a forecast Sponsor date for when you expect the customer to make a decision.	You obtained a sponsor at your customer who wants to move forward with the use case. OR You determined the use case is no longer a path with the customer and close it out as No Plans to Deploy.
Sponsored	A sponsor has agreed to proceed with deploying the use case. When in this stage the sponsor may not yet be ready to move forward, but is committed. Projects can skip from Propose to Planning if work continues after the sponsor is identified.	Resources at the customer are ready to engage and start planning the actual deployment.
Planning	The customer is in the process of planning the actual deployment of the project. All projects in this stage should have a target installation date, and you may be able to forecast a go live date as well.	The initial installation has been completed successfully.
Deploying	The customer installed the products in the plan in their first environment (e.g., sandbox, dev/test, prod, etc.). All projects in this stage should have a forecast production go-live date.	The customer has their first use case in production. To test this ask yourself the following questions: 1. If the customer had to make a decision on renewal today, would they renew as they are getting value and would be impacted without it?

		2. If there was an outage, would their business be impacted?
Deployed	The deployment is installed and operational in a production environment. To achieve this stage does not mean all of the entitlement is in use, but that at least a portion is used for the project as defined. Update the Project Outcome field to Closed - Successful.	None
No plans to deploy	The customer has decided not to pursue this use case. Typically, this stage follows proposed if a sponsor is not found for the project, but projects can be moved to this stage at any time.	Update the Plan Outcome field and create a Timeline entry to explain why the use case will not move forward.

Identify the use case

For each deployment project, you will need to define the use case. A use case describes how a solution helps a user accomplish a particular goal to receive business value.

The first step is to determine your starting point. Does your customer have a well-defined use case or not? The answer determines where you go next.

You have a prioritized use case
Check with the account team to determine if a use case was identified during the pre-sales stage. A use case might have also been defined during the account planning process.

If the use case is already defined, take note of as many details as possible so you can document this in Gainsight. If you have any questions or gaps in knowledge about the use case, you can always ask clarifying questions to the client. You will learn more about the business value and technical environment throughout the deployment stages.

My customer is ready to move to the cloud
If you have met with your customer's sponsor and determined that they have a well-defined use case that requires them to move to IBM Cloud to modernize an existing application or create a new one, help them to get started using the IBM Cloud. After you understand their use case and environment, install and configure their cloud. If they are using offering features that they are unfamiliar with, demo the features they can use in their solution. Regularly keep in the touch to assist with support, renewal, and expansion.

My customer needs to move to a Cloud Pak from a point product or upgrade product version
If you have met with your customer's sponsor and determined that they have a well-defined use case that requires upgrading to a new version of a product or that requires moving to an IBM Cloud Pak, they might simply want your help installing their offering on the platform of their choice. After you understand their use case and environment, help them install and configure their offering. If they are using offering features that they are unfamiliar with, demo and enable them on the features they can use in their solution. Regularly keep in the touch to assist with Support, renewal, and expansion.

Point product to Cloud Pak Guidance

Clients have invested millions into their infrastructure to build the most robust application platform. To protect that investment, they now need help to modernize their estate. When the client has the desire to understand the benefits and ROI of migrating traditional, tiered, enterprise applications to containers, we may need to help our clients identify the suitable candidates for container deployment. On the other hand, not all applications are meant for containers. We can also evaluate the readiness of existing applications. Proper preparation, accurate estimates, deep expertise, and a modernization plan are the best insurance for a successful modernization.

When your customer has a use case that requires them to move from a point product to an IBM Cloud Pak, you should use the [Cloud Pak Modernization Guide](). It's important to note that use case analysis is extremely important and allows the team to decompose the high-level requirements to a more detailed list of real requirements needed to achieve the client's business objective.

There is no use case identified

There are multiple reasons why an entitlement may not have a pre-defined use case. It might have been sold as part of a financial deal such as an Enterprise License Agreement (ELA). The client might not even know they are entitled to the product. When this happens, it is up to you to sell the customer on the value of a product that they have already purchased.

Your very first step is to study the use cases that are available for your product either in the accompanying technical playbooks or on Seismic.

The customer use case defines what they want to accomplish. The business outcome defines business value they will get from the solution. The next step is to help them gain a deeper understanding of the technology needed to reach their goals.

Document the success plan

Whether you are using a Customer Success platform (such as Gainsight) or not, it's always best to document plans you agree to with your customer so that others can read the plan, understand the status, and assist you when needed. Your plans also provide useful insight to sales teams that might be working on future opportunities.

In Gainsight, there are several types of Success Plans that you can use to document the customer landscape, your objectives, and the steps to execute so that others can read the plan and understand the status.

Use different success plan types to communicate your objectives for a use case or describe the risk.

- Partner CSM – Growth Plan
- Partner CSM – Retention Plan

Wherever you document your plans, consider the following questions:

1. Does the current objective come through? What is the measurable outcome or value? What is causing any risk or expectation of churn?
2. Does the plan leverage the best of your organizations and potentially IBM? Can you pull in other teams or approaches to accelerate outcomes?
3. Does the plan have concrete actions with target dates? What actions are being taken - by when and by whom - to achieve the desired outcome?

Best practices for effective plans:
- Use accurate due dates and modify as needed as the plan proceeds.
- Keep your project status accurate.
- Be as detailed and descriptive as possible when describing use cases, client situations, factors contributing to unsuccessful deployments. You want someone reading the plan to understand the full situation.
- Keep the plan up to date. Update due dates and add/remove objectives/tasks as the need arises.

When you complete a plan, document the outcome, results, and lessons learned.

View the training in Module 3 to learn more.

Propose a solution

Start the conversation
After identifying a use case and documenting the plan in Gainsight, you need to propose the solution to the client. You should always start with a discussion with the account to ensure alignment on audience, agenda, content, and outcomes.

When proposing a solution to your client, it's important that you invite the relevant stakeholders and potential sponsors to this meeting. You will want to provide a briefing on the solution's capabilities and how those capabilities map to the client's strategic priorities.

Describe the value - the savings, the process improvement, the time reduction - that the customer anticipates as from implementing a solution. Focus on the business value that this solution drives. Remember that the client has competing priorities for time and resources. You will want to demonstrate a compelling reason to act.

Deliver use case workshops
Leverage your account team as well as any resources your organization may offer to support you. IBM Technology Expert Labs has many modernization workshop offerings they could jointly deliver with you.

IBM Technology Expert Labs offers no-cost workshops that enable the team to understand the customer's current state, identify use cases, and generate a to-be architecture that helps your customer realize their business opportunities.

Connect with an IBM CSM to identify the right resources for your specific needs.

Wow your customer with a great demo
Build a demo of key use cases. Show your customer the art of the possible. Stand up an environment that is like theirs and personalize the demo to make a stronger impact.

→ Create a fantastic demo
→ IBM Demos

Stand up an environment
Get your hands on an environment so you are ready for your customer.

→ IBMPartnerDemo – This resource provides step-by-step instructions on setting up environments with IBM TechZone and IBM Cloud, specifically for IBM Cloud Paks.

Your IBM Distributor may offer additional demo environments. Be sure to check so you and take advantage of all that is available to support your customer situation.

Handling Objections
When you get customer objections, you should drill down to uncover what is really driving them. Here are some examples of how to handle product-specific objections and formulate your response.

- Cloud Pak for Business Automation Objection Handling
- RedHat OpenShift Objection Handling
- watsonx Orchestrate Objection Handling

Outcomes of this stage
The outcome of this stage is that a sponsor and stakeholders are interested in the solution and want to move forward. This might lead to sponsorship of the project, or the client might want to see a demo or a Proof of Value (PoV).

A PoV is a build activity that demonstrates value of the IBM product based on a client's use case or technology pattern. The PoV is hands-on with the client or the client's input. It showcases how a solution can meet the success criteria for a specific use case.

Get sponsorship

In this stage, you have a sponsor who has agreed to proceed with deploying the prioritized use case. When in this stage the sponsor may not yet be ready to move forward but is committed. Projects can skip from Propose to Planning if work continues after the sponsor is identified.

Gain agreement from the sponsor
After you have refined the workload, it is time to get sponsor commitment on both the workload and the measure of success.

If the sponsor has been involved all along, their commitment might be implied. As a best practice, however, the key individuals you have been working with at the customer should jointly review with the sponsor to ensure agreement on:

- The workload: What business problem is being solved?
- Success criteria: What are the key performance indicators (KPIs) that will give insight into workload build?
- Resources: Identification of any infrastructure and human resources are lined up and committed to build the workload.
- Timeline: Expectations on timeline for key workload.

Expand the engaged stakeholders
To move a workload into production, you will require an additional set of stakeholders. For example, you might need to engage additional tool owners, security or networking stakeholders, the operations team, etc.

What if the sponsor is not in agreement?
If the sponsor does not agree that the workload, success criteria, resources, or timeline are defined correctly, then you will need to go back to discover the prioritized use case.

Next steps
At the end of this stage, the customer resources are ready to engage and start the planning stage.

Plan the deployment

In this stage, the customer is in the process of planning the actual deployment of the project. All projects in this stage should have a target installation date and you might be able to forecast a go live date as well.

Validate the use case
Through the Identify and Propose phases, there is an initial perspective on the return on investment, architecture, and what is required to move the use case into production. Confirm that the initial perspective is still valid.

Create the architecture
As a CSM, you are not expected to architect a solution, but you are expected to participate in the development of the solution architecture. Architects work with the team to design the application, platform, and operational environment.

Collaborate with your customer on a minimum viable architecture.

- Leverage the IBM Cloud Architecture Center for proven patterns.
- Document other technology dependencies for the workload.

For complex environments, consider if you should recommend paid professional services from your own organization or IBM Expert Labs.

Learn More:
Architectures
Data architecture

Identify the resources needed to deliver
As you work through the deployment plan, identify the resources needed for successful delivery and ensure they are funded and available to work within the schedule desired by the customer.

If you identify gaps in your customer’s resources, consider what implementation services your organization may offer. Else, consider other partners such as IBM Expert Labs, IBM Consulting, or another organization your firm may have an alliance partnership with.

Identify the delivery milestones
Knowing the delivery milestones identified by your customer allows you to recognize if the project is on or off track. The milestones vary based on the product, the use case, and the dynamics at the customer. As a CSM, you should compare the project to other deployments to identify:

- Milestones not considered by the customer
- Unrealistic timeframes

During milestone delivery, stay tightly connected to the customer's progress. Listen for issues so you can resolve them before they become critical situations. When necessary, work with your broader team or seek assistance from an IBM CSM or the IBM ecosystem team. Ensure your customer knows how to escalate support tickets. When your customer identifies missing product capabilities, use the Request product enhancements process and notify the customer's IBM CSM, if assigned.

Be aware of delivery milestones defined in a professional services contract. Any modifications to the milestones should be discussed and agreed among all stakeholders.

Build an integrated learning plan
Consider what additional education your customer might need to be successful during or after the production deployment. This may include:

- Training for new resources responsible for scaling the workload
- Bootcamps for users that will use the new workload once it is deployed
- Paid training offered by IBM or IBM partners

Scale out the workload
Support your customer through the production deployment by listening for roadblocks and sharing expertise to achieve the optimal outcome, while you continue to work a "what's next" plan.

Unless authorized by your organization, do not work in a customer's production environment.

There are common objectives shared by all customers; however, it is important to tailor this phase to your customer's expectations.

Install and provision

Ensure your customer has a great experience when installing IBM software. In Gainsight growth plans, "install and build" is equivalent to the Deploying stage.

Enlist the right resources for a successful installation
After you have defined the workload, the product will need to be installed and configured. Identify whether the customer has the resources and expertise to do the install themselves or whether you can assist them. They may need to consider securing professional services from your organization or IBM Technology Expert Labs.

For all installations:
- Consider infrastructure requirements beyond the resources to install (hardware, networking, etc.).
- Consider the number of environments that should be configured based on DevOps best practices (Development, Test, Production) and the MVP architecture (High Availability (HA), etc.).

- Consider how to provision storage capacity using approved options. Refer to Storage Considerations for IBM Cloud Paks.

Consider using IBM Cloud for additional workloads
Often customers do not have the necessary hardware infrastructure for additional workloads. When this occurs, propose an implementation on the IBM Cloud. This is a great opportunity to showcase Red Hat OpenShift Kubernetes Service (ROKS), one- click install capability, and bare metal offerings.

Build the solution

You and the customer will co-create to build the function defined in the use case.

CSMs do not deliver services that should be part of a paid professional services engagement. As a CSM for an IBM partner, be sure you understand what professional services your organization offers and how to engage. You may also work with your IBM sales team to engage IBM Expert Labs to support your customer should they need services beyond what your organization can provide.

Production environment guidance
As a CSM, your mission is to do everything you can to help your customer successfully consume IBM software as part of solutions that satisfy their business needs. There are a few limitations that you must keep in mind as you work with your customer.

If you find that your customer wants you to do work in their production environment, pause. Working in a production environment carries certain liability and should not be done without a statement of work (SOW) in place to protect your and your firm. Seek guidance on how you should proceed from your leadership team.

Enable the customer to take ownership
Use this opportunity to invite the customer to shadow any hands-on technical activities and enable them to take ownership of some of the tasks so they can learn in the process.

Collaborating with IBM CSMs
If an IBM CSM is assigned to your customer, this is a great time to work together. Help them understand whether your organization is providing implementation services. IBM CSMs have technical expertise in many IBM software products. They can help you overcome technical issues either by engaging other IBM teams or through their own experience. By having a shared understanding of your roles, you'll be able to leverage the right skills at the right time.

Go live and measure success

Congratulations! You and your customer have worked together and finished building the initial workload using IBM software. It is time to make a critical decision.

This checkpoint is a key tool to determine if the initial workload will be scaled and moved into production, or if more work is required.

Demo the solutions for your sponsors
With your customer and, where assigned, the IBM CSM, jointly review the outcomes against the agreed-upon success criteria.

The playback includes:
- Demonstration of the live workload against requirements
- Feedback from users who tested out the new implementation
- Measurable outcomes against the success KPIs

Be candid on lessons learned:
- What worked in their environment?
- What were the challenges?
- Are there any additional recommendations to consider when moving the workload to production?

Include a proposal for how to move forward:
- If successful, what is required for the customer to move forward and take the workload into production?
- Does the customer have the resources required or is additional investment needed? (e.g., infrastructure, licensing, staffing, etc.)

Decide on best next action
Based on customer feedback during the playback, consider the next best actions.

Proceed to move to production
- Build a plan with the customer to scale out.
- Consider professional services proposals to accelerate outcomes.
- Start to consider the next workload to explore.

Add additional function based on customer feedback
- Take note of the feedback from the sponsor playback.
- Iterate and add new function to the workload.
- Playback to sponsor again when the feedback has been integrated into the workload.

Stop the project. The customer is not interested in moving forward.
- Determine if other sponsors might have interest.
- Identify additional candidate workloads.

After you have co-created a solution with your customer, it is important to step back and evaluate whether the solution delivers the expected outcome. Embrace continuous experimentation and delivery. Adapt as you go to ensure your customer achieves outcome.

Remember that scaling to production can include platform and application installation, configuration and management, test, and helping to set up DevOps

Checkpoints and Executive Business Reviews (EBRs)
Customer Success Managers frequently engage with clients to advise and guide them through the tactical day-to-day activities they face and assist in removing adoption barriers that they encounter. While these engagements are critical to the successful deployment of our offerings, there are two additional meetings that you cannot overlook.

Checkpoints:
A periodic review with the total team, including the client, any partners, and IBM to ensure alignment on the specific initiative underway. This should include key milestones, offering best practices, and offering enhancements that would be of value. Checkpoints are an important activity that the total team participates in (client team, IBM and partners).

These meetings center around tactical priorities and focus on detailed activities and short-term actions needed to be successful for a particular initiative. They are an important activity to communicate among the team and manage success during client events such as onboarding or rolling out new capabilities.

Executive Business Reviews:
A periodic review with the executive sponsors from the client and IBM to ensure alignment on more strategic initiatives. This is a time to reinforce progress the client is making in their adoption and align on strategic objectives of the client.

- Meet with your technical sponsors after each milestone to understand the successful outcome.
- Meet with your business sponsor at least quarterly to review and ensure things are progressing as expected and the direction is still aligned.
- After deploying the workload, meet with your business sponsor to ensure business value is realized.

Executive Business Reviews

What is an EBR and why is it important?

An EBR is a periodic review with the executive sponsors from the client and the IBM team (and partners) to ensure alignment at a strategic level. It should be held quarterly. This is a time to reinforce progress the client is making in their adoption, align on strategic objectives of the client, uncover additional opportunities, and review the customer’s entitlement and deployment.

The EBR is an opportunity to align with the client’s executive team on past accomplishments, the current state, and future direction. Be sure to include the business outcomes that result from implementing the solution. The meeting should have a strategic focus and participation of the client’s executives or high-level decision makers is essential.

When should I hold an EBR?
The periodic EBR meetings usually begin sometime after the client has successfully moved a workload into production. Another approach is to hold the EBR at the completion of a success plan. It is best to hold these meetings quarterly.

Why hold an EBR?
Hold product-focus deep dives with the executive team that sponsored the use case that was deployed. CSMs can work with the account team to ensure that deployment data, product roadmaps, and strategy alignment are included in the EBR. IBM CSMs may be able to contribute additional information.

How do I prepare to hold an EBR?
Preparing for an EBR is like preparing for any important client meeting. The meeting should be held face-to-face whenever possible.

Coordinate with the client sponsor before the meeting to learn what topics are on their mind, what is causing any dissatisfaction as well as feedback applicable to improving the business. If it doesn't fit the agenda, work with the client in the days leading up to the meeting to address or resolve the issue or topic. This will help keep the meeting on track and prevent it from veering away from the agenda. Based on what you learn, find the appropriate executive sponsor from your team to help balance the discussion.

EBR agenda
The agenda will vary by client, but they all should include time to discuss the following:

- Celebrate past accomplishments. Highlight major milestones achieved and the team involved.
- Validate the present state. Focus the discussion on where we are and what we plan to accomplish in the near term.
- Discuss future objectives and direction. Items on this list should be at least 6-12 months away.

It is important that an EBR makes the client feel heard and allow them to validate the success plan moving forward. A successful EBR will generate a list of follow-up items for you and your team and provide guidance for the next client success plan.

Plan to do a dry run through the agenda and materials internally prior to the meeting. Consider holding prep calls with any speakers who will attend.

Who should participate?
Confirm who will attend prior to the meeting. Understand their role in the organization and influence on decision making. The size of the client's organization will probably impact who attends. Consider rescheduling if the client executive is not able to attend.
Keep the portion of the meeting with the client's executive team to under an hour and a half. Often EBRs will have an additional "working" session with the stakeholders and other team members – keep this separate from the strategic discussion with client executives.

Partner/IBM	Customer
CSM IBM CSM (if engaged with customer) Partner account executive Partner Pre-sales technical	Executive sponsor Project sponsor LOB executive Individual who engages, consumes, or has responsibility for software agreement

Steps to hold the meeting

On-site at the client:

- Identify a central point of contact for a client on-site meeting to help with logistics.
- Verify that the meeting room is reserved and can accommodate all of the attendees.
- Determine if security badges will be needed at the client site. Arrive early enough to complete this process.
- Arrange wi-fi access with the client sponsor prior to the meeting.
- Verify that a projector or display will be available.
- Arrange for catering or restaurant reservations (follow any company guidelines) ahead of time.
- Share web meeting info ahead of time for those not attending in person.

Virtual meeting:

- Ensure everyone has access to the web meeting platform.
- Test with client meeting sponsor prior to the meeting.

Align as much as possible to the way your client works. Customize the presentation, using their language, terms, metrics, colors, and logo.

Tips from the field

Some tips and guidance from seasoned CSMs for holding a successful EBR include:

- Bring something new to share with the client each time you meet. This will add a fresh aspect to the meetings and help keep the client engaged with the solution and IBM. It can also help guide the client's future direction and engagement. Consider sharing industry benchmarks and how they measure up against them. Highlight an article or paper that is relevant to the client's plans and future direction. Make it a goal to educate and engage in a different way each time.
- Plan to present your client with a "big ask" at each meeting. It will be different for each client and depend on the current state of the relationship. Some examples are asking them to be a reference, attend or speak at a conference, provide feedback to OM, participate in beta testing or commit to move forward on future roadmap items. Support this with content covered in the meeting.
- A lot of information is shared and discussed in a short period of time at an EBR, so select another team member to take notes. As the CSM you will likely be playing the role of "master of ceremony" and will not have much time for anything else.
- Don't wait for the client to come up with their desired future state – be prepared to tell them where they should focus and what they need to be doing.
- Keep in mind that an EBR is for validation of the current state and future path.

- Guard against the discussion going off-topic or turning into a performance review. Consider using the "parking lot" approach to table anything that should be discussed at another time. Prevent it by addressing as much as possible with the client prior to the meeting.

Outcomes

You should expect to leave the meeting with:

- A discussion and alignment regarding outcomes achieved since the last EBR
- Relationship and agreement regarding the health assessment
- A shared understanding of the software consumption and utilization
- Any issues (business, technical, engagement) identified and surfaced so they can be addressed promptly
- New projects or areas for expansion
- Possible new access/entry points

Be sure to update Gainsight growth plans or share a summary with the IBM team.

Resources

- Article: What is a Quarterly Business Review (QBR): 5 Choices That Make or Break It
- Article: The essential guide to quarterly business reviews
- EBR Presentation Template

Expand and renew

Reassess customer roadmap

Prepare

Before approaching the customer, come together as an account team and debrief. A cross- section of the team should participate in this activity, including the principal/seller from your organization. Consider including the IBM participants including the IBM seller, tech seller and IBM. If a delivery team is working with the customer, they have first-hand experience that sheds light on what is working for the customer and where there might be areas for improvement. They should understand the next steps the customer would be most receptive to or where adjustments in strategy/direction are needed. Use this insight to help the progress the customer to the next step.

Host a candid and open conversation that harvests the initial insights with the account team. Ensure the participating team members are clear on the goals of the upcoming conversation with the customer and decide who from the team should plan to attend.

Goals of the Customer Roadmap Retrospective

The goals of the customer conversation are to:

- Discern if it is necessary to pivot from the current MVP or continue.
- Create, validate, or adjust the customer roadmap.
- Leverage insights and inputs to help define the next step in the journey.

Participants in the Customer Roadmap Retrospective

Customer participants: - Business sponsor(s) - Engagement lead(s) - Senior technical lead(s) - Other customer stakeholders, as appropriate	Account team participants: - You, the CSM - Delivery team - Principal / Seller - Practice lead - IBM CSM and sellers assigned to the customer - Other IBM stakeholders, as appropriate

Key steps

There are several key steps for conducting a roadmap retrospective.

Step 1 - Review the business opportunity statement and use case from the recently completed delivery. Answer the following questions:

- Were metrics captured?
- Was the hypothesis proven? If not, why?
- Is the business opportunity still valid? If not, then revisit the business opportunity statement.
- What did we do well?
- What can we do differently in the future?

Note: Revisiting and potentially changing the business opportunity might require additional use case discovery.

Step 2 - Update the assumptions and risks
Assuming the business opportunity is still valid as originally stated, revisit the relevant assumptions and risks activities from the business framing, technical discovery, and design thinking workshops.

- What assumptions/risks were addressed?
- Are there any new assumptions or risks to consider?
- After the most recent MVP hypothesis has been tested, what are the next greatest assumptions about achieving the original business opportunity? Note that assumptions can be technical, but they can also be about expected business outcomes.
- Incorrect assumptions introduce risk. The most critical assumption and most concerning risk should be the focus of the next MVP. As each MVP in the roadmap addresses the next greatest risk, confidence increases in achieving the original business opportunity.

Step 3 - Visualize the updated roadmap
Take the opportunity to work with your customer on an updated roadmap.

The goals of visualizing the roadmap include:
- Aligning the team's focus with the customer's business goals (near- and long-term)
- Articulating progression to ever-increasing value.
- Creating a shared understanding of the path toward a healthy, long-term customer relationship.
- Understanding which strategic products are included in the roadmap.
- Understanding how the customer's roadmap aligns with the partner's and IBM's technical strategy.

When reviewing your customer's updated roadmap, discuss which initiatives the customer would like to prioritize. Take note of the customer's reasons behind this decision and indicate prioritized initiatives on the roadmap.

Step 4: Begin to work with your customer on a new business opportunity. You are now ready to align with the customer on the next MVP by starting over with business framing.

Expand offering

Entry point
The customer has deployed a solution and recognizes value.

Outcomes
You have positioned additional products or services that align with the customer's objectives.

What is expansion?
When you have helped a customer achieve meaningful business outcomes with their initial use case, you have built a relationship as their trusted CSM advisor. By understanding your customer's current and future projects and initiatives, you have the opportunity to grow the use of their current entitlements and/or position additional products or services that align with their business objectives.

Common expansion practices

Common practices include:

- Up-sell to generate more revenue from their current product
- Cross-sell to generate new revenue from a related product or services engagement
- Identify new use cases to increase deployments
- Find additional sponsors to find new use cases

Collaborating with IBM teams
The relationships you have developed with IBM teams during the Deploy phase are key when discussing expansion.

- Engage these resources to co-develop the appropriate expansion strategy. Each organization brings insight to the strategic initiatives as well as experience with the current usage and use cases.
- Your customer may have multiple partner relationships. Consider whether there are other organizations they use as technology consultants or implementation service providers. You will need to navigate across these relationships to identify a path for growth.
- As new sales opportunities are identified, be sure to let the IBM team know when you or your sales team have registered them in the IBM Partner Portal. Transparency preserves trust across the ecosystem relationship.

Renew offerings

Entry point
You delivered a use case with your customer leveraging their entitled IBM software.

Outcomes
Your customer renewed their software entitlement.

What is the role of a CSM in the renewal process?
The renewal process is important for two reasons. The first is to retain recurring revenue for your partner firm and for IBM. The second is to ensure customers are properly entitled to continue to use IBM software.

Customer success is all about getting customers deployed. Deployment is the first step. However, deploying an initial use case does not mean a customer is getting full value, using it as a core part of the business, or that they are seeing a return on investment from their purchase. The ONLY way to achieve that is to drive additional use cases.

You should work within your organization to understand how they process renewals, who from the customer is involved, the role of your distributor and the IBM team.

Know what is coming up for renewal
On your Reseller dashboard in Gainsight, you have several reports available to help you see upcoming renewals:

- Renewals left this quarter
- Renewals next quarter
- Rolling 90-day renewals

Refer to the training information on how to use Gainsight for additional information.

Renewal Health and Retention Plans
As you work with your customer, you should understand any renewal risk far in advance of a renewal taking place. There are early warning indicators you need to look for as signs a customer might churn.

Create a Retention Plan if Relationship Health is red or yellow, or in the following scenarios:

- 9 months prior to a renewal, there is no sponsor or use case identified
- 6 months prior to renewal, the entitlement is not in deploying state
- Competitive threat has appeared (competitive POC, strategic re-architecting initiative, etc.)

The retention plan conveys the risk and the actions that might reverse it. Leverage all resources available to help you mitigate risk.

Best practices for collaborating between CSM and the renewal team
The shared goal for both CSM and the renewal team should be to pursue a renewal that improves the overall customer experience with your organization and IBM, increases customer usage, and increases renewal rates.

Typically, renewals are organized using a timeline that starts when your customer is approaching the renewal date – usually either 180 days or 90 days prior. The process suggests actions and content to use at each stage.

Every customer is in a different stage of their journey. The CSM and renewal teams are expected to personalize renewal efforts for each customer. This guide helps you to organize and streamline the renewal effort.

Renewal timeline and activities

9 months	A plan for deployment is expected to be in place with an identified use case and sponsor.
6 months	Initiate discussion with the person responsible for the renewal transaction as well as those surrounding the account within your organization and at IBM.
4 months	Establish a communication plan with key stakeholders: • Document any unique customer circumstances that should be taken into consideration when creating the renewal communication plan. The CSM shares their insight with the renewal team as part of plan development process. • Who will contact the customer (CSM, Partner renewal Rep, IBM rep)? • When will they contact the customer? • What customer information should be included (ex: usage data, migration projects, expansion and growth plans, etc.)? • What is going to be proposed to the customer? • What ordering system needs to be used to process the renewal paperwork?

	• Who (Partner, IBM?) is going to process the renewal paperwork?
3 months through to 15 days	Execute the agreed-upon communication plan and update stakeholders on progress and any newly identified risk or opportunity.
Renewal Date	Confirm the renewal with that customer, thank them for their ongoing relationship and make a plan to discuss any needed next steps.

Advocate for IBM

Why client advocacy matters

It is estimated that 85-97% of IT buyers indicate they rely on peer (client advocate) recommendations, ratings, and reviews. The participation of IBM client references and advocates in various activities help influence future buyers.

Clients as IBM advocates

Client references from numerous organizations have graciously agreed to participate in acts of advocacy for IBM - giving of their time, knowledge, and experience. Clients have helped close deals, influenced the outcome of analyst reports, and elevated the IBM brand through various activities.

Not all client references are created equally. That is why it is important to understand client reference activities can range in the type of participation and frequency with which clients feel comfortable.

Clients can participate in either or both Private and Public reference activities, and they may choose how often and when they will participate (Note: even though a client may agree to participate at one point in time, the relationship can change, and clients are never obligated to participate):

Private:
- RFP participation – agreement to be named in an RFP
- Peer-to-Peer sales calls
- Analyst research via interviews and surveys (anonymous)
- Net Promoter Score (NPS) survey
- Product reviews (anonymous)
- Sales materials inclusive of client organization logo – PPTs, internal videos, etc.
- Internal Use Case write-ups
- Interviews for internal all-hands and town-halls

Public:
- Written case studies posted on IBM.com
- Video interviews and audiograms posted on IBM.com
- Blog posts written and posted on IBM.com
- Public speaking at IBM events
- Press releases and media interviews

Opportunity: Your client's IBM solution is deployed or in production and they recognize the value. The right time to have the conversation with the client about becoming a reference is when:
- A project milestone has been achieved
- An unexpected positive outcome
- They state they are pleased or appreciative
- They ask about buying more IBM solutions or expanding the contract

Prepare: Be sure you understand the available client reference activities before you have the conversation with your client. Think first about your client's personality type and ensure you are ready to handle objections. It is essential to remind clients that they choose what they are willing to do, how often, and when. (Remember: The phrase “client reference” is often associated with *public acts of advocacy*, which may discourage some clients. Take the time to explain the various opportunities.)

Inquire: Every client will have different levels of comfort about participating in a reference program. Therefore, it is important to consider when and how you proceed with the client reference discussion. Some clients will happily only do peer-to-peer calls or anonymous analyst reports. Others will gladly speak at IBM events. You know your client’s personality and the history of the IBM relationship.

Overcome objections

Objection 1: We have a company policy against providing public references
Answer: Would you be willing to do a private reference? For example, would you: Participate in an analyst relations report (fully anonymous)?
Agree to a peer-to-peer call?
Write an anonymous product review?

Objection 2: I am not at the right level in the organization
Answer: Anyone at any level in a client organization is free to write/publish product reviews. If you and your team use the product, we welcome your honest and anonymous feedback.

Objection 3: I do not want to go public with any statements about any vendors
Answer: I completely understand. IBM has a private reference program available too. It includes participation in analyst research, or taking a private call from another potential customer to tell them about your experience.

Objection 4: What’s in it for me?
Answer: Depending on your level of participation
Public: Social eminence, networking opportunities, the market
Private: work with analysts, meet your peers, influence the market

Gaining agreement - how to initiate a client reference

If your client is ready to participate as a reference, [review the process on how to nominate]() a client story.

Quick wins - Peer Reviews with Gartner Peer Insights
Peer reviews on Gartner Peer Insights empower our customers to tell stories that inspire confidence in IBM products. Their stories inspire others to make the decision to choose IBM. More importantly, Gartner analysts fully rely on client reviews as data to determine vendor placement in Magic Quadrant and Critical Capabilities Reports, along with other reports such as Voice of Customer and Customer’s Choice.

In as little as 10-15 minutes, clients can publish a product review anonymously on [Gartner Peer Insights]() and help to influence both their peers and the analyst reports.

Getting started with Gainsight

Gainsight is the main workbench tool for IBM and Partner CSMs to operationalize the customer success practice. The key benefits of using the platform include:

1. Visibility to the IBM software sold by your organization
2. Ability to prioritize your customer assignments
3. Ability to identify and address moments that matter (e.g., renewals or usage-based events)
4. Ability to document customer deployment plans and risks for shared visibility, support, and transitions
5. Opportunity to collaborate with others who may be involved with the customer

Complete the [training modules] before getting started in the tool.

Gainsight can be overwhelming. Follow the set of key activities below to help you become familiar with the tool and use it most effectively.

Key Gainsight activities

	What	Why	When	How	Tips
1	**From your Home dashboard, use the All Relationships report to prioritize focus relationships.**	Identify which customer relationships you will focus on.	Every two weeks	Consider: • Those with no IBM CSM • A specific product focus • Customers strategic to your organization • Upcoming renewals • New sales	• To find new sales, filter the report column "New in last 45 days" to "true"
2	**Complete the Partner CSM Assignment**	• Communicate to the IBM team that you are looking after a customer relationship • Helps you find the focus relationships more easily • Helps manage work for those relationships	When prioritized above	• On the R360 Partner Assignment tab, Add Record and fill in the requested information	• Create only one Partner CSM assignment record. Duplicate assignment records will result in duplicate rows in "All Customer Relationships" table. • There is a lag of up to 24 hours after Partner CSM assignment before it will appear in reports on your home dashboard. • Create CTAs to remind you about customer-specific checkpoints and activities.
3	**Provide a Relationship Health (SaaS/Subs) sentiment; address potential renewal risks**	• Communicates a point of view to the IBM team • Prioritize in-quarter and upcoming renewals	• Start of each quarter (baseline), then monthly (or as needed)	• On the home dashboard, view the "Renewal Left in Quarter" or "Renewal Rolling Next 90 Days (SaaS and Subscription only)" to identify upcoming renewals.	• On the R360, use only the existing records for Month-Year of renewal. Do not create a new record from the Relationship Health tab of the R360. • If there are no Month-Year records for Relationships Health, the entitlement is

				• Click on the 3 blue dots corresponding to renewal Month-Year to update “Sentiment”. • On the R360 Relationship Health tab, edit the record for the appropriate Month-Year of Renewal record • If sentiment is yellow or red, track risk actions through a PCSM Retention plan	not SaaS or Subscription, so this capability is not applicable. • Ensure “Sentiment” field is populated for ALL SaaS and Subscription relationships, regardless of renewal timeline. Once baseline is established, focus should shift to adjusting baseline for current quarter and next quarter renewals as well as “Sentiment” updates for remainder of relationships. • CTAs are automatically created for upcoming renewals. Take recommended steps and close the CTA when completed.
5	**Create and update Growth/Retention Plan**	• Primarily method to document a deployment plan or potential risk	• Weekly	• On the R360 Success Plan tab, Create Success Plan and choose either **Partner Growth** or **Partner Retention** plan types.	• Confirm any other team members working on a deployment with your IBM CSM Focal. Partner CSMs cannot view IBM-created deployment plans. • Create separate growth plans for each new use case deployed and/or additional licenses sold. • Use Success Plan Completeness widget to evaluate the completion status of your plans and prioritize updates. • Review Documenting Use Cases in Gainsight Growth Plans in the Appendix

6	**Monitor and close out CTAs**	Close out completed or irrelevant CTAs to ensure you see new items that need attention.	• Weekly	• On the left side navigation go to Cockpit. View My CTAs or All CTAs. For any marked New, review and change to In Progress or Close.	• Sort by date or view Overdue or Upcoming. CTAs can be useful tools to manage items across multiple customers.

View the Demo Walkthrough to see more on how to complete each of the above activities.

Access IBM Support

Understand IBM Support

Because partners organizations like yours are often involved with customers before, during and after a solution is deployed, you will likely encounter times when you need to engage with IBM Support. Of course, you are not responsible for following and reporting back on the progress of open issues however, you can and should be an advocate for your customer.

- Get started by learning the various support resources at IBM Support
- Review the IBM Support Guide details how to open cases and work with IBM Support.
- Understand how IBM defines Severity and help your customer assess severity based on business impact.

Understand Severity and Business Impact

Review the IBM Enterprise Support and Preferred Care Severity Definitions for severities customers may assign to their support case. Ensure that the case severity mirrors the associated business impact listed below.

- **Severity 1: Critical System or Service Down:** Business critical functionality is inoperable, or a critical interface has failed. This usually applies to a production environment and indicates an inability to access products or services resulting in a critical impact on operations. This condition requires an immediate solution. **Note:** IBM will work with the customer 24 hours a day, seven days a week to resolve Severity 1 problems provided the customer has a technical resource available to work during those hours. The customer must reasonably assist IBM with any problem diagnosis and resolution. For **IBM Cloud services**, the customer must log a Service Down case within 24 hours of first becoming aware that there is a critical business impact, and the Cloud service is not available.
- **Severity 2: Significant:** A product, service, business feature, or function of the product or service is severely restricted in its use, or the customer is in jeopardy of missing business deadlines.
- **Severity 3: Some:** The product, service or functionality is usable, and the issue does not represent a significant impact on operations.
- **Severity 4: Minimal:** An inquiry or non-technical request.

Business Impact is not part of the template that customers use to open support cases but is very important when it comes to prioritization by IBM Support teams and by Red Hat if the case requires their help.

Please ensure that a note is added to the support case once it is opened that contains a description of the impact the issue is having on the customer's business and that the impact statement is kept up to date during the life of the support case.

Examples of business impact statements are:

- *"We have a production outage impacting business activities."*
- *"We are committed to complete production roll out by July 15 and must have this support case solved by July 1st. Otherwise we will incur additional expense."*

Help your customer get issues resolved

Being proactive ahead of a production deadline or upgrade can make a strong and positive impact on your client's experience. You may suggest the customer open a "Proactive" by opening a case in advance of the critical date using a Severity 2 or Severity 3.

Red Hat Cases

If the case requires assistance from Red Hat, the IBM Support team will open a case with Red Hat directly. It is mandatory that a Remote Access Rider is completed by the customer before Red Hat Support will participate in a Webex session. This is a Red Hat legal requirement and is not covered by any agreement the customer may already have in place with IBM Support. IBM Support will email the customer a link to the Rider when they open a case with Red Hat. Please ensure that your customer completes the Rider as quickly as possible. This will require a Red Hat account but does not have to be the same account that the Cloud Pak entitlements are loaded in to.

Rider overview:

Your acceptance of this Remote Access Rider is required when you request Red Hat's support team to remotely access your network or systems. Remote access to your network or systems is not a standard Red Hat problem resolution process. Before Red Hat logs onto your systems to analyze your support issue, Red Hat needs your approval and authorization for such remote access. Important updates from the Red Hat case will be added to the IBM Case by the IBM Support team

Access to the Red Hat Knowledge Base

A significant portion of the Red Hat technical hints and tips as guidance is reserved for Red Hat paid subscribers or Partners. Cloud Pak customers are considered Red Hat paid subscribers and as a result should have access to all the content in the Knowledge Base.

Managed Escalation

A Managed Escalation Case (MEC) can be used when customer satisfaction is at risk due to ongoing unresolved support cases that are impacting an upcoming production deployment project or revenue. A MEC replaces prior IBM process which might be familiar to some partners and customers including Complaints, Critical Situations, and Proactives. A MEC is owned by an "Escalation Owner" who works with the customer to understand the business impact and agree on "success criteria" and then provides leadership on all customer-facing activities to ensure satisfactory progress is being made toward the agreed goals.

A Managed Escalation Case is opened through the IBM Support page and must have a prior case(s) established.

Visibility to customer support cases for IBM Cloud

Your customer may ask you to monitor and help address their open support cases. For IBM Cloud, please refer to the documentation on Assigning access for all support cases in the account to guide your customer to grant you visibility.

Request product enhancements

IBM product managers want to know when your customer encounters an adoption inhibitor or seeks a feature that is not currently available. The Request for Enhancement (RFE) process is used to bring requests to their attention and to prioritize and communicate about these requests. Learn more about the IBM Ideas Portal.

Customers and IBM Partners can submit enhancement requests via product-specific portals. Enter the portal, click on "Add new idea" and follow the instructions.

- All IBM Security products
- IBM Data and AI Aha! Ideas
- IBM Business Automation Aha! Ideas
- IBM Public Cloud Aha! Ideas
- IBM Sustainability Software (Maximo, Tririga, EIS, and Supply Chain)
- All Integration products Ideas

If your customer has an IBM CSM, let them know the idea has been submitted so that they can amplify the request through internal IBM channels.

Best practices for submitting product enhancement requests
When you submit an idea, consider these best practices:

- Check the product roadmap to see if the feature is planned for an upcoming release. Some roadmaps are available on IBM Seismic or you can ask an IBM CSM for assistance.
- Search first. You might find your idea has already been submitted and you can vote for it to add your impact.
- Be specific on the impact of the idea. The more measurable the idea, the stronger the business case.
- Under IBM Wide Managed Tags: Ideas, be sure to select the appropriate page to enable tracking based on your role. For example, select Source: IBM Business Partner

Appendix

Documenting Use Cases in Gainsight Growth Plans

As described in the section Getting started with Gainsight, creating Growth Plans is one of the key activities performed by CSMs. Within the Growth Plan, CSMs describe the project use cases using the B-E-T-O format.

B: Business Challenge
E: Environment
T: Technical Approach
O: Outcomes

The following are examples of how the format is used.

Example 1: WebSphere Hybrid Edition

Business Challenge:
Complex and expensive to scale application server to support workloads, lack of resources to bring up new infrastructure.

Environment (Helpers/Inhibitors):
Inhibitors - Current WebSphere platform
Helper - I believe FIS has on-prem OpenShift environment already.

Technical Approach:
Re-platform current WebSphere: Lift and shift (without changing any functionality) of existing application into container-based platform in OpenShift.

Outcome:
1. Simpler management of WebSphere application server
2. Help FIS refactor WebSphere application into cloud-ready to enable deployment in WebSphere Liberty
By achieving #1 above, #2 provides an opportunity for future modernization by implementing micro-service-based architecture and breaking apart the monolith i.e., WebSphere -> OpenLiberty, Mono2Micro
3. WebSphere cost reduction by re-hosting onto containers

Example 2: Instana

Business:
Pre-paid debit application's (DPP) reporting feature may be causing DB crashes.

Environment:
DPP is written in Java and runs on JBoss application servers on RHEL VMs. RHEL hosts are managed by Panorama (Palo Alto software).

Technology:
With Instana's JBoss and SQL sensors, gain deep observability into both the runtime stack trace, and service call network tracing to see what lines of code, and what network interactions may be related to application outages. Implement alerts and events to categorize critical and minor risk and notify teams as they occur in real time.

Outcome:
Instana to break through and compete with Dynatrace with stunning UI and detailed tracing capabilities.

Example 3: CloudPak for Integration

Business challenge:
With the recent acquisition of XXX, YYY is now responsible for a much larger volume of public securities trading than before. This increased volume has led to some failures. To improve performance and efficiency, YYY has been exploring new database technologies and dividing their responsibilities, with Aerospike being one of the most successful, taking on responsibility of nightly backups from Db2. YYY has also been exploring Confluent Kafka. Lastly, some infrastructure/cloud solutions they have been using without much success are Anthos, Tanzu, and GKE.

Environment:
Today, consumer-facing trading applications such as *yyy.com* send consumer trades into their back-end system called "TPS". TPS then processes the trades by sending them into one of ~130 MQ appliances, and these eventually send them along to CICS mainframe with MQ as well. They have told us that there is a single point of failure between these MQ appliances and the MQ running on CICS.

Technology:
We plan to propose the scalability and availability of container-based architecture with MQ (CP4I) running on OpenShift to eliminate single points of failure that may exist. Of 130 MQ appliances, there are many queues, each of which are dedicated to specific trading blocks. In the early stages, we still don't know much about the queue design and why this was done but hope to find out more as we build out a proposal strategy.

Outcomes:
Cloud Pak expansion opportunities.

- Integration: Event Streams, API-Connect, DataPower
- Business Auto: ODM
- Data: OpenPages, Db2

YYY benefits:

- Simplified management of messaging solution (consolidation of ~130 MQ appliances down to 1 OpenShift & Cloud Pak platform) and reduced operating expenses as a result.
- Elimination of trading platform TT
- MQ UIs
- Self-Healing & MQ redundancy for immediate failover

Storage guidance for all IBM Cloud Paks

Cloud Pak for Integration		
Summary	**Storage Type**	**Documentation**
The Cloud Pak license entitles the customer to use of IBM Spectrum Fusion. The entitlement provides access for a single period of up to one year and up to 6 TB usable capacity for each of IBM Primary Storage, IBM Backup Storage, and Metadata Management	IBM Spectrum Fusion including Red Hat OpenShift Data Foundation Essentials OpenShift Container Storage Version 4.6 or higher and OpenShift Data Foundation Portworx Storage Version 2.5.5 or above IBM Cloud Block storage and IBM Cloud File storage	Documentation

Cloud Pak for Data		
Summary	**Storage Type**	**Documentation**
The Cloud Pak license entitles the customer to use of IBM Spectrum Fusion. The entitlement provides access for a single period of up to one year and up to 6 TB usable capacity for each of IBM Primary Storage, IBM Backup Storage, and Metadata Management Portworx -> OCS migrations with CPD 3.x -> 4 upgrades CSM Guidance for HA/DR Backup/Restore Encryption	IBM Spectrum Fusion including Red Hat OpenShift Data Foundation Essentials Red Hat OpenShift Container Storage Version 4.6 or higher and OpenShift Data Foundation Network File System (NFS) Version 4 Portworx Version: - 2.5.0.1 or later is required for Red Hat OpenShift Version 3.11 - 2.6.2 or later is required for Red Hat OpenShift Version 4.6	

Cloud Pak for Business Automation		
Summary	**Storage Type**	**Documentation**
Storage classes must be POSIX-compliant, such as when used with NFS or CIFS. On IBM Cloud (ROKS), use the gid storage classes: ibmc-file-bronze-gid, ibmc-file-silver-gid, and ibmc-file-gold-gid	Red Hat OpenShift Container Storage Version 4.6 or higher and OpenShift Data Foundation IBM Spectrum Scale Network File System (NFS) Version 4	Documentation

	IBM Cloud File Storage	

Cloud Pak for Watson AIOps		
Summary	**Storage Type**	**Documentation**
The Cloud Pak license entitles the customer to use of IBM Spectrum Fusion. The entitlement provides access for a single period of up to one year and up to 6 TB usable capacity for each of IBM Primary Storage, IBM Backup Storage, and Metadata Management	IBM Spectrum Fusion including Red Hat OpenShift Data Foundation Essentials Red Hat OpenShift Container Storage Version 4.6 or higher and OpenShift Data Foundation Portworx High IO	Documentation

Cloud Pak for Security		
Summary	**Storage Type**	**Documentation**
Supported on IBM Spectrum Fusion, Amazon Web Services (AWS), IBM Cloud®(Classic), IBM Cloud®(VPC2), Microsoft Azure, VMware	Validated storage classes: - ocs-storagecluster-ceph-rbd (Red Hat ODF, IBM Spectrum Fusion) - ocs-storagecluster-cephfs (Red Hat ODF, IBM Spectrum Fusion) - ibm-spectrum-scale-sc (IBM Spectrum Fusion, IBM Spectrum Scale) - gp2 (AWS) - gp2-csi (AWS) - ibmc-block-gold (IBM Cloud) - ibmc-file-gold-gid (IBM Cloud) - ibmc-vpc-block-10iops-tier (IBM Cloud VPC2) - managed-premium (Microsoft Azure) - portworx-fs (Portworx) - portworx-shared-sc (Portworx) - vsphere-storage-blockvsphere-volume(thin) (VMware)	Documentation

Create a fantastic demo

Trigger emotion by telling a story when delivering a compelling, convincing, unforgettable, customer-specific, value-based demo or technical presentation.

Writing a good customer demo is more than just stepping people through the features and functions of your product. When building an engaging demo, you need to make it memorable. One way to do that is to make your demo or presentation tell a story.

The story needs to apply the value of the IBM offerings to the customer's specific needs or industry.

Learn from an accomplished storytellerf (former IBMer)
The following information, summarized from a video by Louis Richardson, talks you through the how's and why's of creating a demo that your customer will remember.

The first important thing to understand is what not to do. Do not simply create a bulleted list of product facts and features and step through them one by one. Without putting the facts and features into some sort of memorable context, your customer will not remember them even a few hours later.

Instead of simply educating your customer, entertain and enchant them by telling a story. Stories help carry meaning. Connect the information to stories you already know. These stories help people remember what you want them to know. Subtlety works. Get your audience to come to their own conclusion. Make them feel smart. People will never forget how you make them feel!

> *What can beat a good product? A better story.*
> – Louis Richardson (former IBMer)

Ask this question when you leave every call with a customer - What is the feeling I left them with?

Be sure to include these elements to craft a good story:

- Give a time and a place.
  - Don't make the audience guess the basic facts. Guessing distracts them as you tell your story.
- Include connected events.
  - Do not add extra things that do not have importance or a purpose. – Everything in the story must have a purpose.
  - Describe what happened. Add descriptive details to make people see what you are talking about.
  - Describe the actions – make people feel.
  - Answer the question - Why do they care?
- Use people and dialog.
- Make sure the story has an insight, something your customer did not know. Identify the insight that wraps up the story ending first, then craft the middle of the story to build up to the insight.

Visit Louis Richardson's YouTube channel to learn more.

Discover the characteristics of a great story

Brian G Peters is a story creator at Pixar. He has compiled a list of characteristics that make up great stories.

Great stories:

- Are universal
- Have a clear structure and purpose
- Have a character to root for - an underdog
- Appeal to our deepest emotions
- Are surprising and unexpected
- Are simple and focused

Read the 6 Rules of Great Storytelling (As Told by Pixar) blog posting to learn things you can do to make your stories and demos great!

Resources

- Understanding the Forgetting Curve
- The 7 Sentence Product Demo Framework: How Storytelling Sells Your Product

Customer data guidance

It is best not to request or use customer data for demonstration purposes. The handling of customer data requires careful handling. If you are requested to use customer data in a demo, consult your management team for guidance.

IBM Copyright