

IBM Customer Success Management

# Field Guide

**IBM.**

**Customer number:**

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Customer Success Management Field Guide**

<https://ibm.biz/ibm-customer-success-field-guide>





# IBM Customer Success Management

The mission of IBM Customer Success Management is to help you succeed in achieving your business objectives and getting the maximum value from IBM technology. Customer Success Managers (CSMs) work beside you to ensure your successful deployment and adoption of IBM offerings in your solutions.

## ACCELERATE YOUR TIME TO VALUE

**CSMs are technical experts.** Your CSM brings deep product knowledge to help you identify use cases and architect, implement, deploy, and grow your solutions. They have a vast network of additional resources to help you along the way.

**CSMs follow and facilitate the adoption of best practices.** Your CSM follows a prescriptive approach based on time-tested best practices to help you achieve success. CSMs can help you adopt best practices through solution definition, architecture, development, and deployment.

**Customer success culture enables your success.** Your CSM collaborates with you every step of the way to ensure your success.

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## What's inside?

This field guide provides a high-level overview of how your IBM CSM can help you.

### LEARN IT

A summary of the concepts.

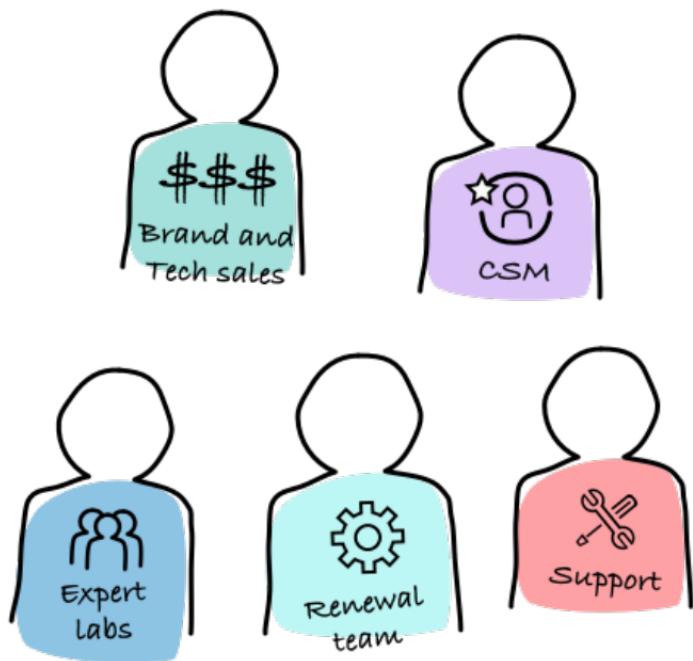
### GET STARTED

Tips to best understand how to work with your CSM.

# CSMs & IBM roles

Throughout your engagement with IBM, you will interact with multiple people in different roles. Each role is responsible for a different part of your journey. Understand where your CSM fits into the larger IBM team.

## WHO DOES WHAT AND WHEN



**Learn how IBM offerings can help you from IBM Sales.** The IBM sales team drives activities by using technical discovery and initial use case identification. They understand your objectives and help align on how IBM can bring them to life as you are assessing a purchase. They can also help you combine additional offerings with your current investment to pursue new opportunities.

**Bring your use cases to life with your CSM.** Align with your CSM to accelerate your time to value with the offerings you have purchased. Work with your CSM to learn how to get the most from what you have bought through demonstrations, opportunity exploration, technical discovery, use case identification, solution architecture design, deployment and growth.

**Engage Expert Labs.** Expert Labs can assist you with product installation. Employ their billable services to accelerate deployment and adoption for complex use cases and migrations in your environment.

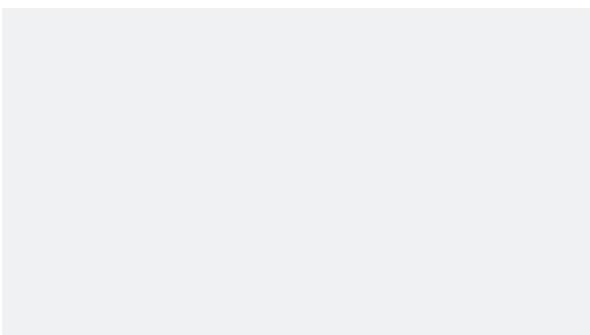
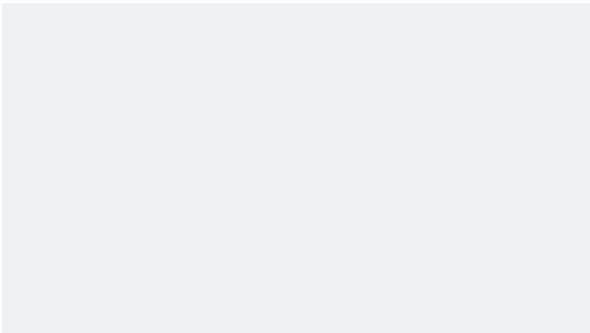
**Work with the Renewal team.** When it is time to renew your offerings, the Renewal team drives the renewal process from price and impact modeling to renewal contracting and closing your renewal.

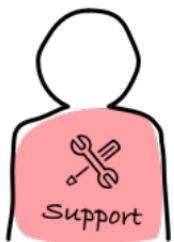
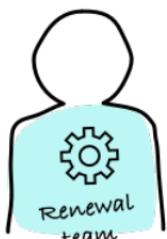
**Get help from IBM Support when things go wrong.** IBM Support provides technical support services for offerings across all deployment and adoption stages.

# Your IBM team

Your IBM team has a number of people who can help as you develop your solutions. Fill in the names and contact information for each of the members of your IBM team.

You might also work with IBM partners. CSMs can work with your partners too. Let your CSM know what you expect from your partner so together they can help you achieve your goals.





# Start your journey - define your goals

As you engage with the IBM team, you might have a clearly defined set of business objectives or goals that you are already working towards, or you might want to engage IBM to help you define a business opportunity to pursue.

## **MAXIMIZE THE VALUE FROM YOUR INVESTMENT**

**Adopt the cloud.** Assess your application workloads, determine whether to leave workloads in their current environment, implement and deploy them in a public cloud, or move to a private cloud.

**Modernize your applications.** Build on what you have today, covering focused user scenarios through applications, integrations, automation, and data. Your starting point, journey, and destination are unique. IBM can help you determine the right path for your needs.

**Infuse AI into your business and processes.** Weave advanced analytical models and AI capabilities into your applications and infrastructure to drive new or improved business capabilities.

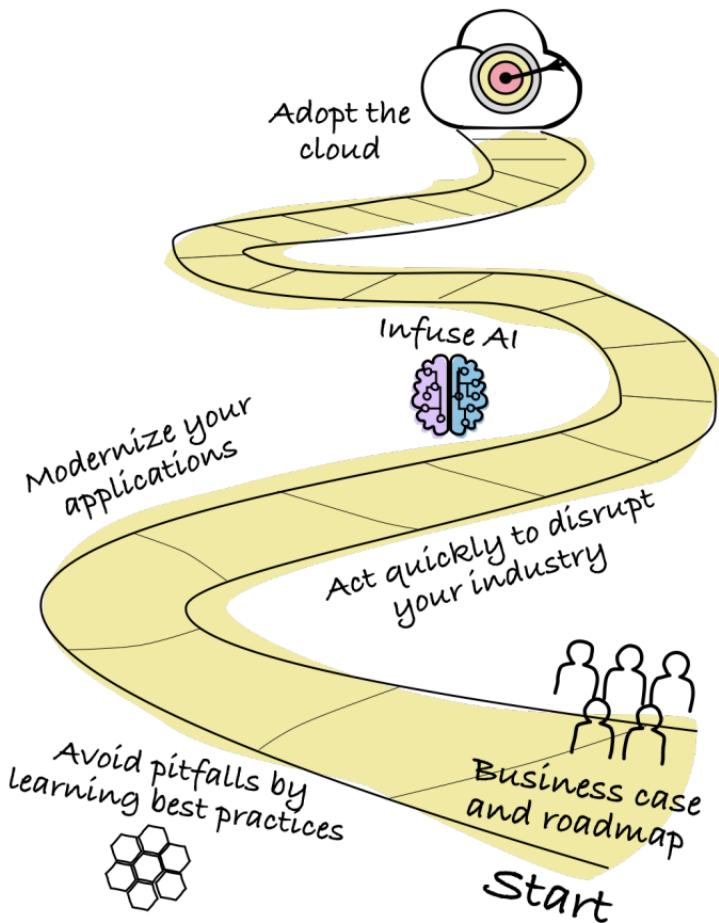
**Transform your business using best practices.** As you work with the IBM team, you can learn and adopt the best practices from the IBM Garage™ Methodology to transform the way you work and enable innovation at speed.



Learn more

Learn more about IBM's hybrid cloud and AI software.

<https://www.ibm.com/software>



Your CSM can help accelerate you toward your goals  
and work with you to define additional opportunities  
to modernize and transform your business.

# Best practices help you achieve success

CSMs are technical experts with deep product knowledge who can help you reach your goals. They can guide you through a process that incorporates proven best practices.

## YOUR CSM IS A MEMBER OF YOUR TEAM!

**Learn how your CSM can help.** Identify opportunities to power up your business with your IBM entitlements, use cases that are clearly focused on the impact you want to make, and minimum viable products (MVPs) that demonstrate value so that you can scale your vision.

**Build & deploy.** Engage your CSM to ensure that you have a successful experience installing and configuring your IBM offerings. They can help as you build and deploy your MVP solution to satisfy your use case.

**Adopt & implement.** Scale your solution to run in your production environment. Track and evaluate metrics to learn if the solution delivers the expected results.

**Expand & Renew.** Build on the success of your MVP by renewing your entitlements and consider introducing new offerings into your enterprise.

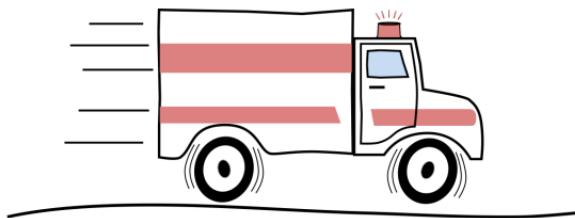
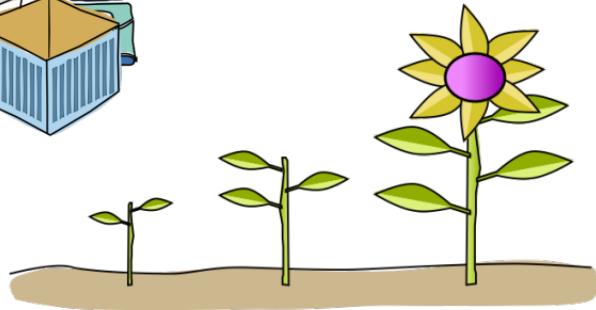
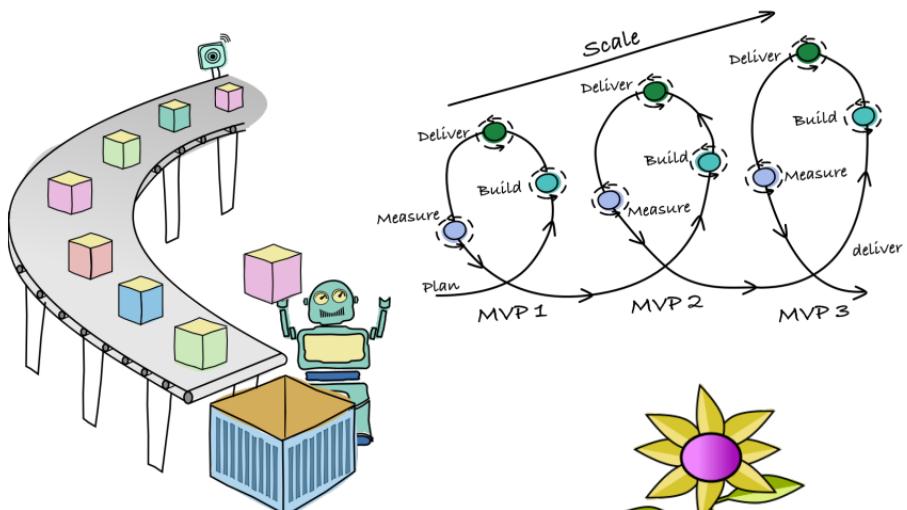
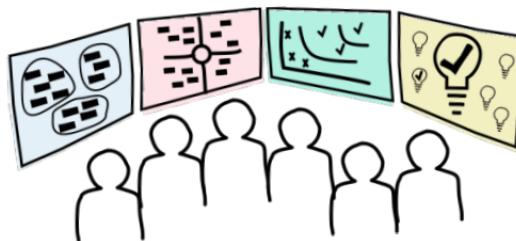
**Troubleshoot & support.** Get help navigating the IBM Support process to report problems you encounter using IBM offerings. Bring forward new requirements needed to develop your solutions.



Learn more

Read about the IBM Garage Methodology.

<https://www.ibm.com/garage/method>



# Learn how your CSM can help

Collaborate with your CSM who understands your pain points, use cases, and can help you implement an MVP to address your pain points and deliver business value. Your CSM can collaborate with your IBM partner as you chart your path together.

## EXPLORE, DEFINE, REFINE, DESIGN, & ARCHITECT

**Frame the business opportunity.** Reflect on your business and share areas with your CSM where you might collaborate. Participate in an interactive and constructive session that deepens your relationship as you together identify a range of opportunities.

**Conduct technical discovery.** When a use case has been defined, further explore your technical landscape with your CSM. Identify the technology required to achieve your goals and begin to define a high-level architecture.

**Design your MVP solution.** Design, define, and refine the user experience for your MVP.

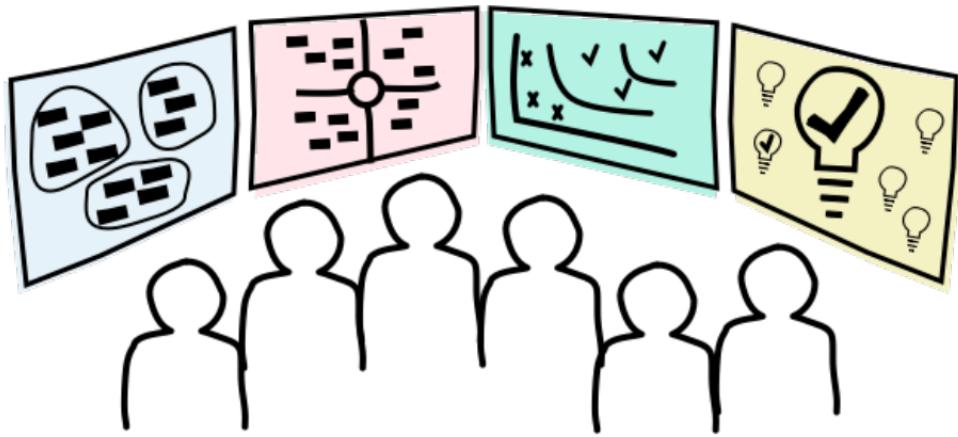
**Architect your MVP.** Collaborate to create the minimum viable architecture that you need to deliver your solution. Engage IBM Expert Labs for an Architecture Workshop for complex solutions.



Learn more

Start by defining your business opportunity.

<https://www.ibm.com/garage/method/practices/discover/frame-your-business-opportunity/>



You might have a well-defined use case or you might be entitled to a product you haven't used. Your CSM can help you figure out where to start.

# Build & deploy

You've figured out your goals and what you want to build to achieve them. Your CSM can help you or your IBM partner to install and configure IBM offerings and work beside you as you build your MVP solution.

## INSTALL – THEN ITERATIVELY BUILD AND DEPLOY

**Install the products necessary to build and deploy the solution.** Your CSM works with you to install and configure IBM offerings. They can help you enlist the help of IBM Expert Labs for complex environments and help you understand the value of IBM Cloud® and bare metal offerings.

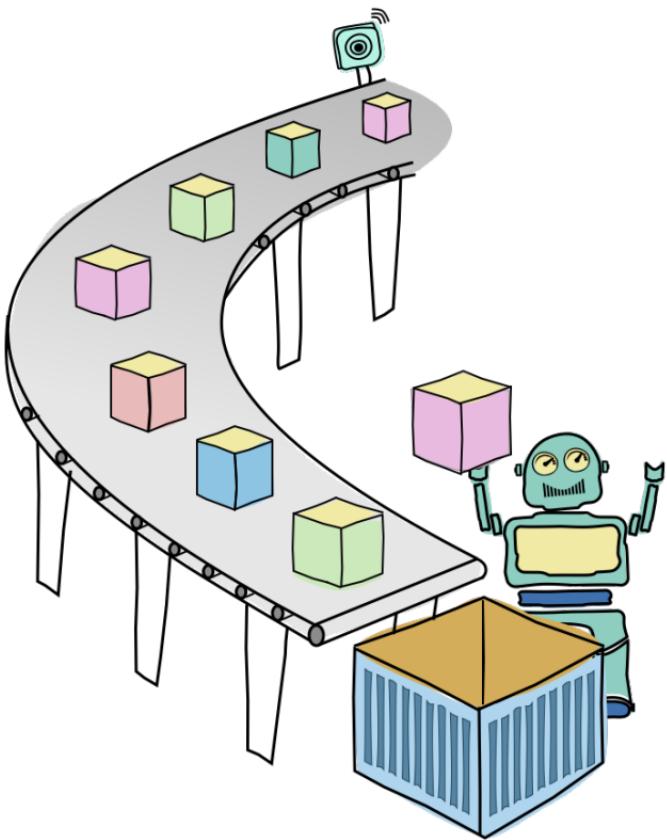
**Build and deploy the MVP solution.** You and your CSM will co-create to build the function defined in your use case. Your CSM can help you learn more about your IBM offering through workshops, shadowing, and learning activities that ensure you understand and can successfully use them.

**Playback the solution and decide best next steps.** When you have a working MVP, your CSM can guide you through a playback with your stakeholders to demonstrate the MVP, gather feedback, and determine when to move your solution to production.



Learn more

Learn how to build and deploy in IBM Documentation.  
<https://www.ibm.com/docs/en>



Install your products, then get busy building and  
deploying your solution.

# Adopt, implement, and scale

With the support of your CSM, deploy your solution to production. CSMs can help you or your IBM partner recognize and navigate roadblocks and share expertise so you can achieve the optimal outcome. You can then continue to work with them on a “what’s next” plan.

## DEPLOY AND MANAGE IN PRODUCTION

**Validate your use cases and engage stakeholders.** Work with your CSM to validate that your solution meets the needs defined in your use case. Engage with an expanded set of stakeholders to ensure deployment and operational support of your solution is successful.

**Identify resources needed for a successful delivery.** When gaps are identified, your CSM can introduce you to other resources like IBM Expert Labs, IBM Global Services, and IBM partners.

**Build learning plans.** Develop learning plans with your CSM to train your team. Make sure the team understands what it takes to scale and manage the solution by participating in bootcamp training or other paid training offered by IBM.

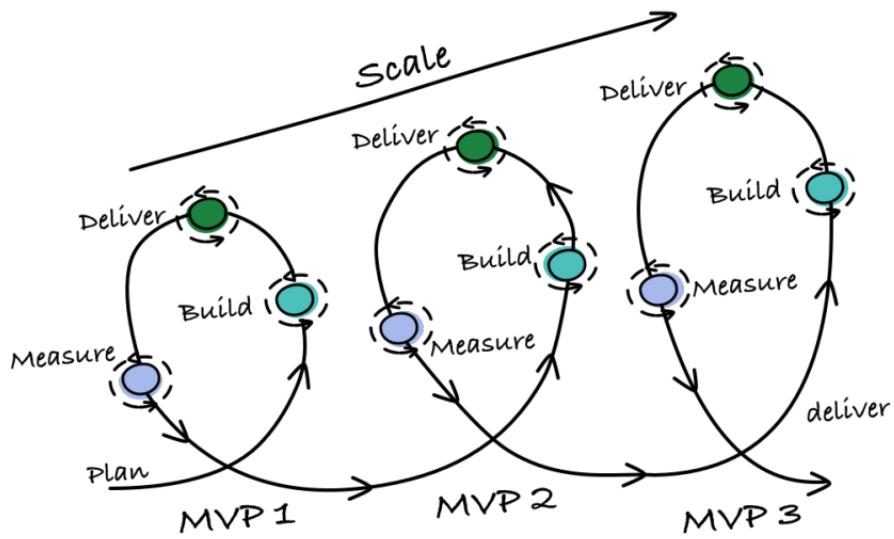
**Playback progress, measure, and learn.** Throughout the deployment process, CSMs participate in playbacks or business reviews to ensure that the project progresses as expected and to measure against success metrics defined for your solution.



Learn more

Learn about scaling your solution for production.

<https://www.ibm.com/garage/method/cooperate/harden-for-production-common>



Iteratively build and deploy production-ready solutions.

# Expand & Renew

As your CSM engages with you to help you successfully deliver solutions that can help you achieve your goals, you can identify potential new lines of business that can gain value from IBM offerings.

## SUCCESS FOR YOU = SUCCESS FOR IBM

**Renew your entitlements.** Your CSM can help you to activate early renewal conversations by connecting you to the renewal and sales teams.

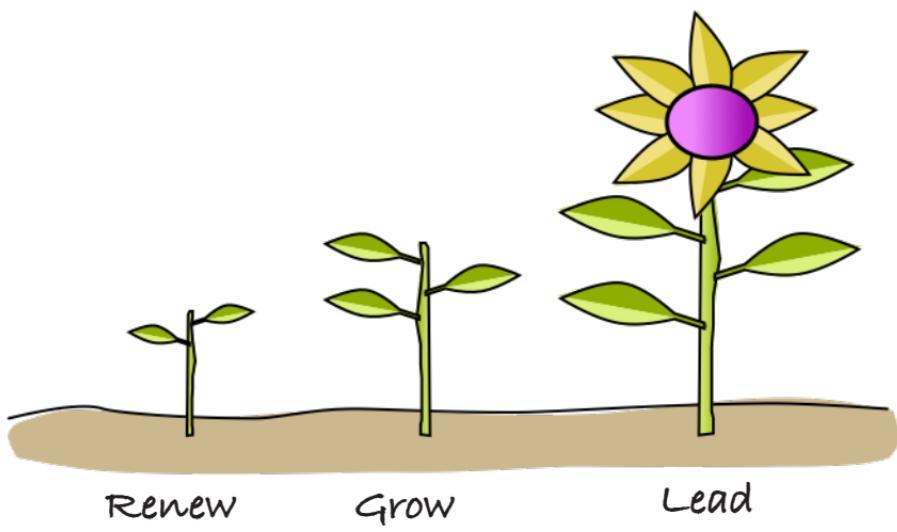
**Grow by using additional offerings.** Let your CSM help you identify where IBM offerings can help you achieve the next opportunities on your roadmap and put you in touch with the sellers who can help you.

**Become a recognized leader in your industry.** Let your CSM help you become a recognized leader by sharing your success story.



Learn more

Learn about IBM Subscription and Support Renewal.  
[https://www.ibm.com/software/passportadvantage/  
subscriptionandsupportrenew.html](https://www.ibm.com/software/passportadvantage/subscriptionandsupportrenew.html)



# Support & troubleshoot

CSMs can help you and your implementation partners understand best practices for how to use IBM technology to proactively prevent some common support issues. While IBM Support is responsible when break/fix issues are uncovered, your CSM is a key resource when issues need escalation.

## HELP! WHO DO YOU CALL?

**Avoid problems by using and sharing best practices.** Learn from your CSM architectural best practices that apply to your industry and use case. They can find best practices shared by IBM subject matter experts (SMEs).

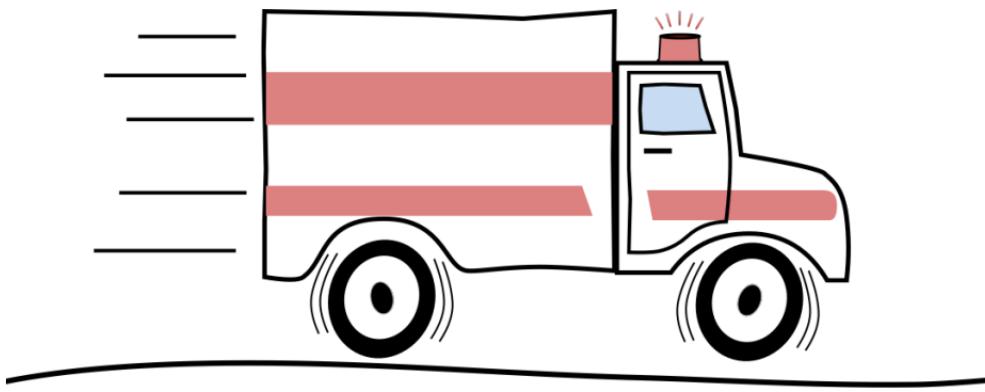
**Report problems.** When you encounter a problem with an IBM product, work with IBM Support to open a ticket.

**Request product enhancements.** Your CSM is your liaison with IBM product management. When you encounter an adoption inhibitor or require a feature that is not currently available in your offering, you or your CSM can submit the idea in the Aha! Portal and your CSM can advocate for your idea with product management.



Learn more

Learn how to contact IBM Support.  
<https://www.ibm.com/support/home/>



Engage your CSM to help you navigate IBM Support.

# Helpful support resources

There are times you might run into problems with your IBM software. IBM Support is there to help.

**Report a problem to IBM Support.** The quickest way to open a Case is through the online SUPPORT COMMUNITY (<https://www.ibm.com/mysupport/>) that can be found on your personalized IBM support portal.

This requires an IBMid and password, which you get with an active IBM.com account. (<https://www.ibm.com/support/pages/create-active-my-ibm-account>) are the instructions to create an IBM.com account.

How to Open a Case (<https://www.ibm.com/mysupport/s/article/How-to-open-a-case>) will guide you on the options of opening cases. Or, contact IBM support through the Support number 800-426-7378.

**Open a product feature enhancement through AHA.** Request feature enhancements from the product manager.

- \* **IBM Cloud Structured Ideas.** <https://ibmcloud.ideas.aha.io/>
- \* **IBM Data and AI Ideas Portal for Clients.** <https://ibm-data-and-ai.ideas.aha.io>

# Support escalation process

We believe IBM Support is “Best of Breed.” If at any point in our service process, you feel we are not meeting our commitments to you, as outlined here, you can call IBM’s attention to this problem by calling IBM Support (800-426-7378) and doing one or all of the following:

1. Be certain to explain the business impact of your problem to the service representative.
2. Raise the Severity Level of the problem.
3. Ask to speak to the person’s manager. Escalations to an IBM manager will receive prompt attention and management focus. You can find contact numbers for your geographic area in the IBM Directory of worldwide contacts (<https://www.ibm.com/planetwide/>).
4. Ask for a “Duty Manager”. The Duty Manager or field manager will work with our technical staff to ensure your request is being handled appropriately.
5. After allowing the Duty Manager time to make an impact, if further escalation is required then open a Complaint or nominate as a Critical Situation (“CritSit”), if warranted, by asking any member of your IBM Client team to do so on your behalf.

# Helpful resources

## Products

- \* **IBM Cloud Paks®.** <https://www.ibm.com/cloud/paks>
- \* **IBM Software download site.** <http://www.ibm.com/support/publications/us/library/#software>
- \* **IBM Cloud Catalog.** <https://cloud.ibm.com/catalog#services>

## Documentation

- \* **IBM Documentation.** <https://www.ibm.com/docs/en>
- \* **IBM Cloud (Cloud product documentation).** <https://cloud.ibm.com/docs>
- \* **IBM Developer (Developer focused portal).** <https://developer.ibm.com/>
- \* **IBM Redbooks® (Solutions and how-tos).** <http://www.redbooks.ibm.com/>

## Learning

**IBM Training and Skills Solutions (Training and certification).** <https://www.ibm.com/training>

## Resources

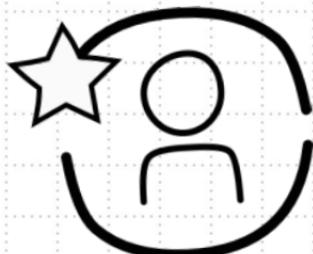
- \* **IBM Community.** <https://community.ibm.com/>
- \* **IBM YouTube channels.** <https://www.youtube.com/channel/UC8cc4pVKVHG7A9fbNsRNrLQ>

**Include your own quick links.**

# Notes:

Learn more about Red  
Hat® OpenShift®

<https://www.openshift.com/>

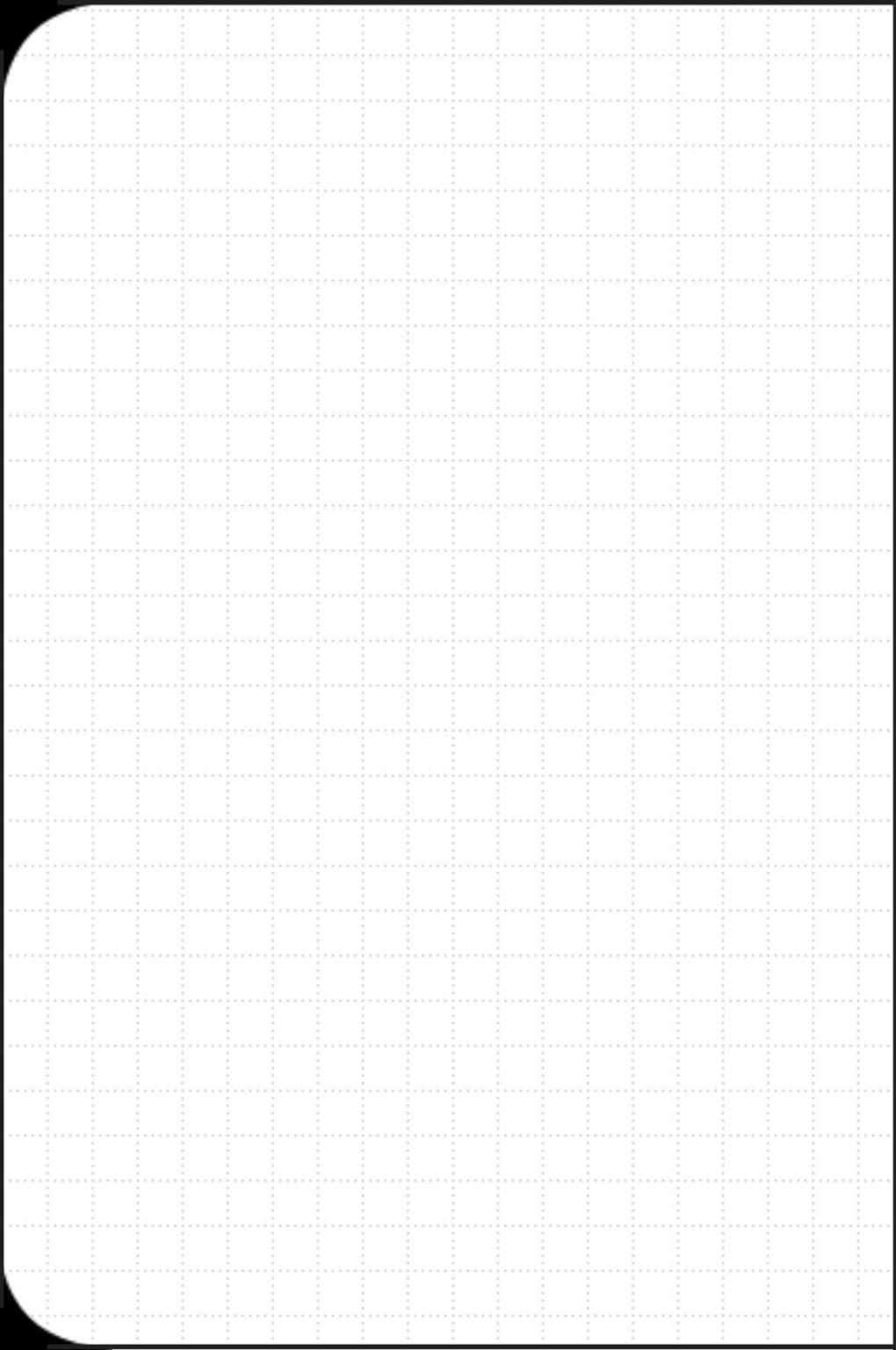


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search?query=%22IBM%20  
Watson%22&gl=en](https://www.ibm.com/demos/search?query=%22IBM%20Watson%22&gl=en)

Get Technical with the IBM Cloud  
Architecture Center

[https://www.ibm.com/cloud/garage/  
architectures](https://www.ibm.com/cloud/garage/architectures)



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