


IBM Customer Success Management

Field Guide



Download the current version of the IBM
Customer Success Management Field Guide 

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

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IBM Customer Success

The mission of IBM Customer Success is to help you achieve your business objectives. Your CSM is your first and best resource to navigate IBM so you can accelerate your time to value and get the greatest return on your investment.

LEVERAGE A TRUSTED ADVISOR

CSMs are technical experts. Your Customer Success Manager (CSM) brings deep product knowledge and can work with you to identify use cases and advise as you 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.

CSMs help you meet your business objectives. IBM invests in CSMs to ensure that you get the maximum value from IBM technology. Align with your CSM to accelerate your time to value with the offerings you have purchased.

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.

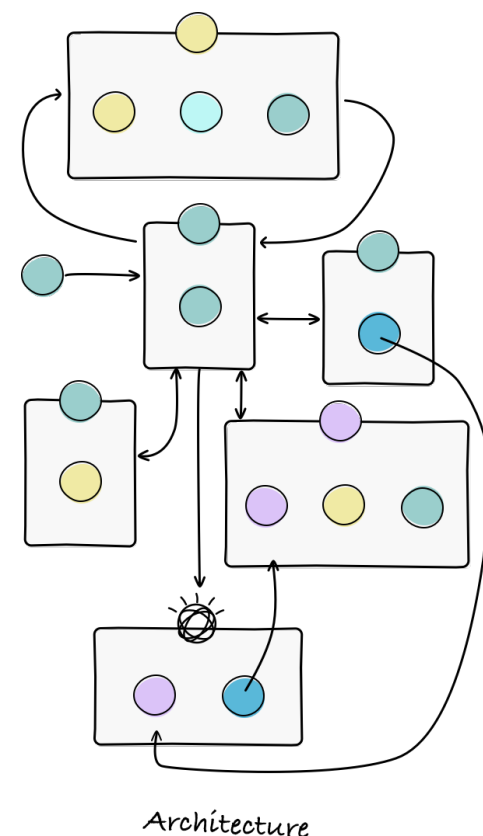
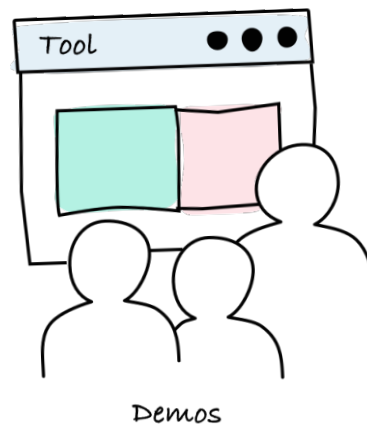
CSM roles

As you define and deploy your solution, CSMs understand how IBM technology can help you meet your business, industry, and strategic initiatives. They can help you to modernize your software, eliminate technical debt, and move to a modern containerized platform. CSMs can show you how to get the most from your software through demonstrations, opportunity exploration, technical discovery, use case identification, solution architecture, deployment and growth.

CSMS BRING YOUR USE CASES TO LIFE

CSM Account Specialists support customers who have a broad portfolio of IBM technology. Account Specialists work with you to get the greatest value from your investment. They work closely with you to understand your business problems, build deployment plans, guide solutions into production, and ensure you have the best experience with IBM technology.

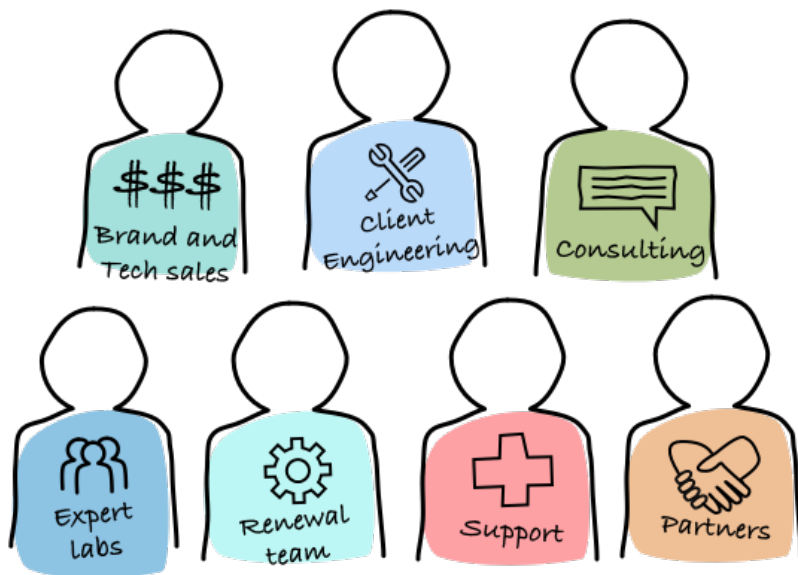
CSM Specialty Architects are technical brand experts. Specialty Architects work with you to ensure that your business goals are met with IBM software and services. CSMs identify use cases, co-create with you to architect solutions, and advise you as you scale use cases to production. Specialty Architects focus on: Automation, Data and AI, IBM Cloud, Security, Storage, Sustainability Software, and zApp & Platform Software, and Kyndryl.



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. CSMs can help you engage with any of the larger IBM team.

WHO DOES WHAT AND WHEN



Learn how IBM offerings can help you from IBM Sales. The IBM sales team understands your objectives and aligns with you on how IBM can bring them to life as you are assessing a purchase. They can also help you identify new offerings to combine with your current investment as you pursue new opportunities.

Co-create with Client Engineering before you buy. Client Engineering (CE) provides a no-cost IBM multi-disciplinary team that will collaborate with you to jointly innovate and rapidly prove solutions based on your business needs, leveraging IBM technologies.

Engage Technology Expert Labs. Employ Technology Expert Labs billable services to accelerate deployment and adoption for complex use cases and migrations in your environment.

Engage IBM Consulting. IBM Consulting collaborates closely with you as you transform and modernize through paid engagements.

IBM Partners build deep relationships IBM customers. IBM Partners have the expertise to build, sell, and provide value-added services around IBM offerings.

Get help from IBM Support when things go wrong. IBM Support provides a number of technical support service offerings across all deployment and adoption stages.

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.

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 IBM Partners too. Let your CSM know what you expect from your IBM Partner so together they can help you achieve your goals.



CSM Account Specialist

CSM Speciality Architect

CSM Manager



IBM Client Executive

IBM Account Technical Lead

Client Sales Rep

IBM Client Engineering



IBM Technology Expert Labs contacts



Billing & contracts

Subscription & Annuity Rep



Client Engineering

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. Consider Red Hat OpenShift as your application platform to manage hybrid cloud, multicloud, and edge deployments.

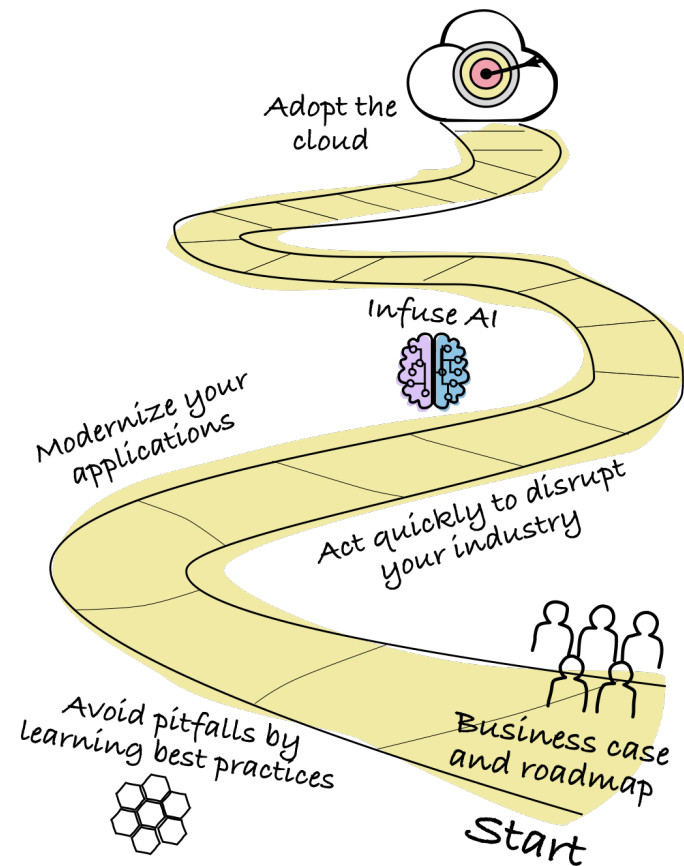
Modernize your applications. Build on what you have today, covering focused user scenarios through applications, integrations, automation, and data. IBM can help you determine the right path as you modernize your software and move to a containerized platform.

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 best practices 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 meeting 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!

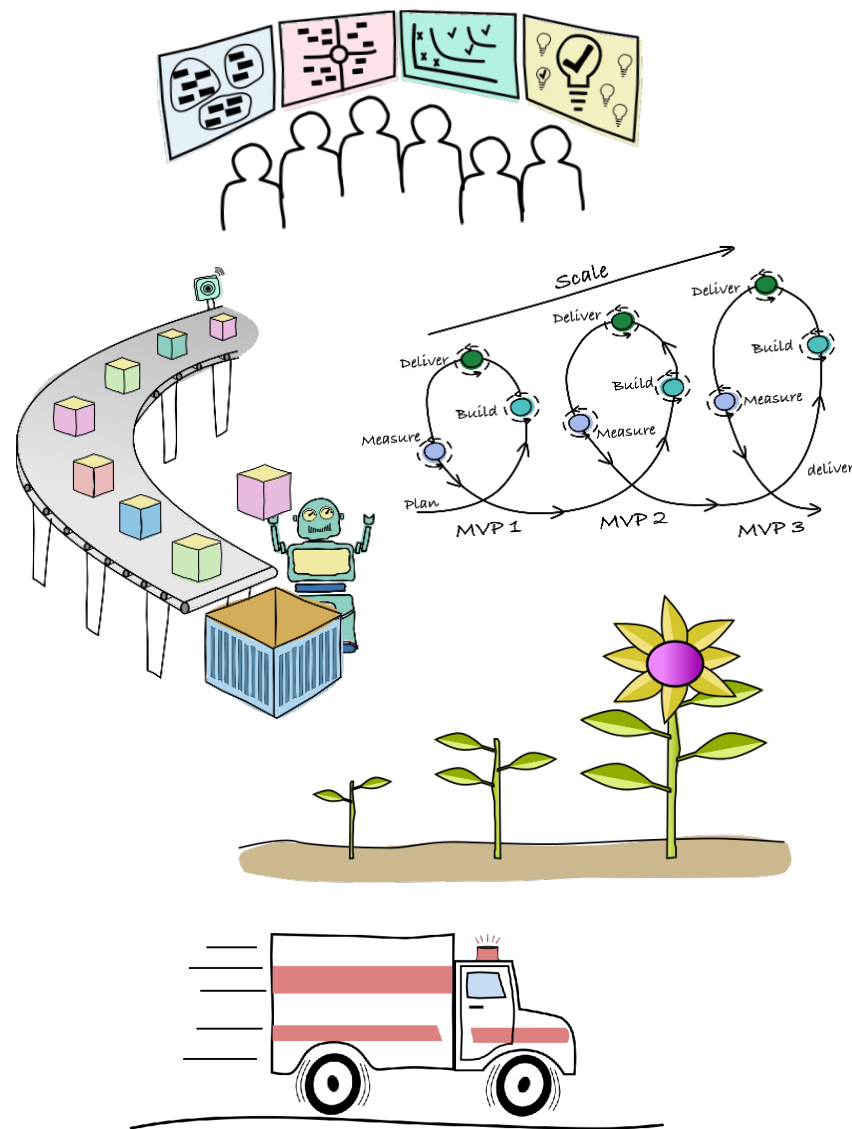
Identify opportunities. Power up your business with your IBM entitlements, identify use cases that are clearly focused on the impact you want to make, and create solutions that demonstrate value so that you can scale your vision.

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 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 solution by renewing your entitlements. 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.



Identify opportunities

Collaborate with your CSM who understands your pain points, use cases, and can help you implement a solution to deliver business value. Your CSM can also work with your IBM Partner as you chart your path together.

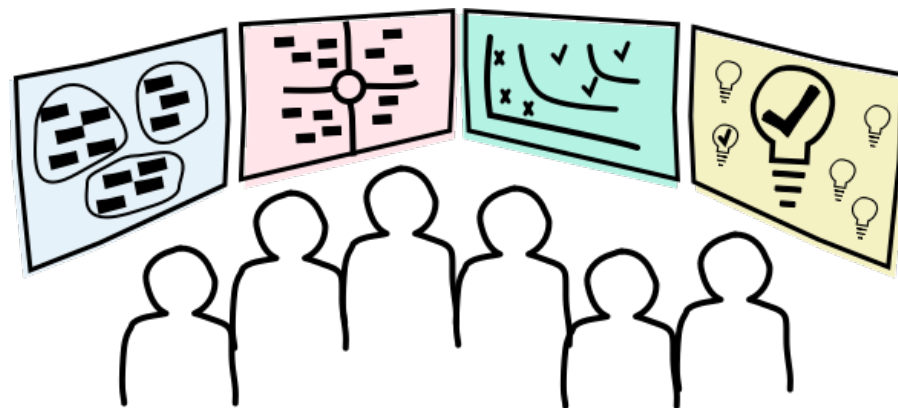
EXPLORE, DEFINE, REFINE, DESIGN, & ARCHITECT

Discover business opportunities. 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 potential use cases.

Gain an understanding of your current environment. When a use case has been defined, further explore your technical landscape with your CSM. Determine whether you need to modernize your software or adopt new technology to achieve your goals.

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

Architect your solution. Co-create to architect your solution working with your CSM.



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 and deploy your solution.

INSTALL – THEN ITERATIVELY BUILD AND DEPLOY

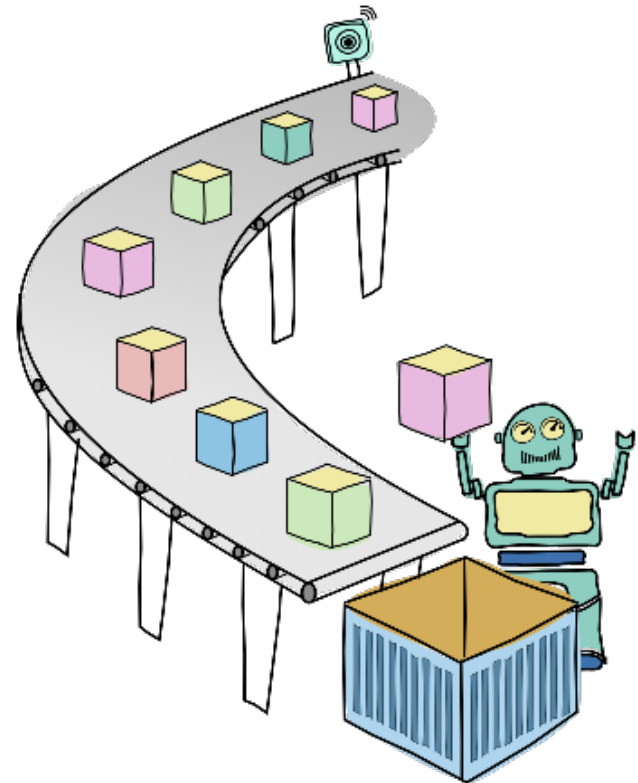
Install the products necessary to build and deploy the solution. Your CSM works with you to install and configure IBM offerings. They can help you enlist IBM Technology Expert Labs for complex deployments.

Build and deploy the 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 solution, your CSM can guide you through a playback with your stakeholders to demonstrate it, gather feedback, and determine when to move your solution to production.

[Learn more](https://www.ibm.com/docs/en)

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 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.

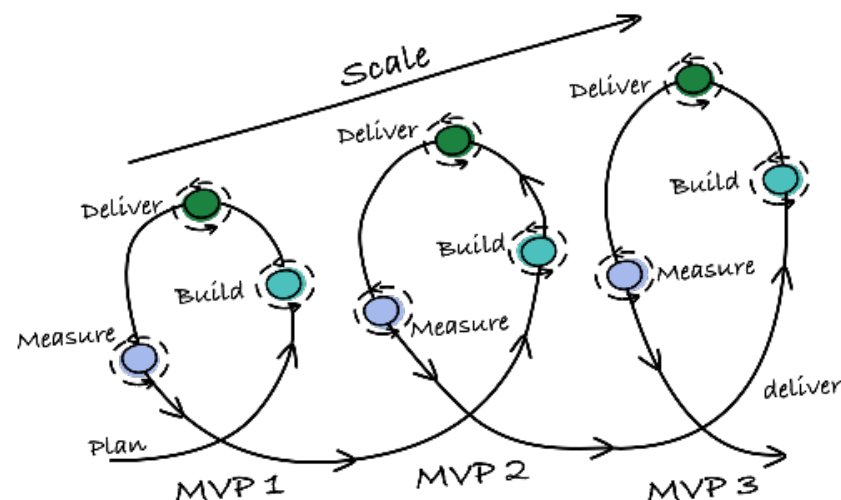
DEPLOY AND MANAGE IN PRODUCTION

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 Technology Expert Labs, IBM Consulting, 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.

Conduct Executive Business Reviews (EBRs) to measure and learn. Throughout the deployment process, CSMs lead EBRs to ensure that the project progresses as expected and to measure against success metrics defined for your solution.



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 business opportunities that can gain value from IBM technology.

SUCCESS FOR YOU = SUCCESS FOR IBM

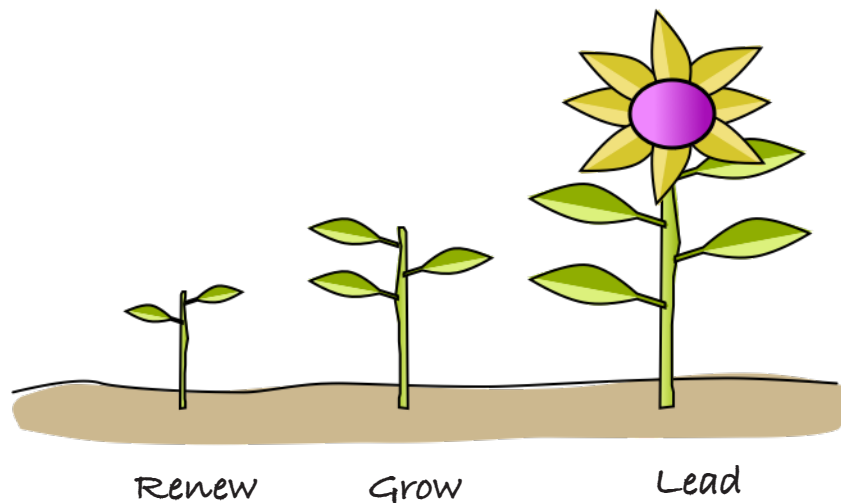
Renew your entitlements. Your CSM can help you to activate early renewal conversations by connecting you to the renewal and sales teams.

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 about IBM Subscription and Support Renewal.
<https://www.ibm.com/software/passportadvantage/subscriptionandsupportrenew.html>



Use Passport Advantage or Passport Advantage Express
to renew your subscriptions and support.

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?

Report problems. When you encounter a problem with an IBM product, work with IBM Support to open a ticket. If you do not get the response you need, your CSM can be your advocate with IBM Support.

Request product enhancements. Your CSM is your liason 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.



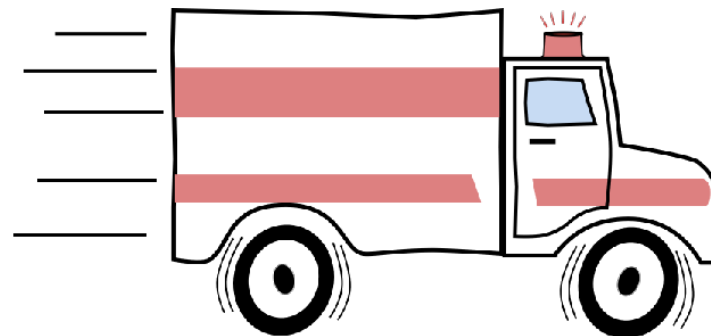
Learn how to contact IBM Support.
<https://www.ibm.com/support/home/>

Understand IBM Support offerings. In addition to IBM standard support, IBM now has several new support offerings to ensure you get the help you need.

IBM Advanced Support: Enables you to acquire an enhanced support experience on top of your active IBM support subscription, providing prioritized case handling and shorter response time objectives.

IBM Extended Support: Enables you to acquire support after IBM standard support ends for your program version or release in use.

IBM Sustained Support: Enables you to acquire support after IBM standard support ends and no new versions or releases are available for the program.



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.

You will need an IBMid and password, which you have 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 IBM Ideas.

When you find that you need a function that is not currently available in your product, you can open a request for a feature enhancement at <https://ideas.ibm.com>

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. You can increase the Severity Level of the Case.
2. Escalate the case using the “Escalate Case Button” inside the Case. Access the case from the [IBM Support site](#), click on the escalate button, fill in the form and submit.
3. Escalate the Case by contacting the Duty Manager. Contact a Duty Manager by reaching out to the SW Call Receive team at 1- 800-426-7378 or local number using the contact information listed here: [IBM Directory of worldwide contacts](#). You can also find the Duty Manager from the [Contact Reference Files \(CRFs\)](#) which can be viewed via [Support Search with Watson](#).
4. Escalation Management MECs (previously Complaint/Critical Situation). If you have any issue or concern that is not being addressed to your satisfaction, you can let us know directly from the [IBM Support Portal](#) by clicking the Escalate an Issue button at the bottom of the page (see [instructions](#) for more details).

Helpful resources

Products

- * **IBM Cloud Paks®.** <https://www.ibm.com/cloud/paks>
- * **IBM Software download site - Passport advantage.** https://www.ibm.com/software/passportadvantage/pao_download_software.html
- * **IBM Cloud Catalog.** <https://cloud.ibm.com/catalog#services>

Documentation

- * **IBM Documentation.** <https://www.ibm.com/docs/en>
- * **IBM Redbooks® (Solutions and how-tos).** <https://www.redbooks.ibm.com/>

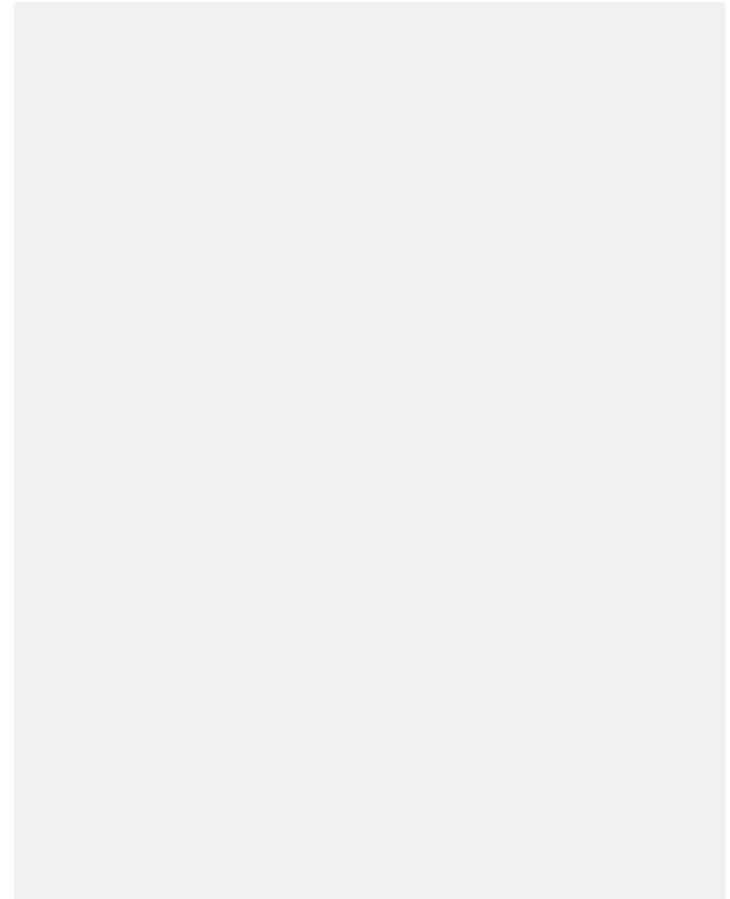
Learning

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.



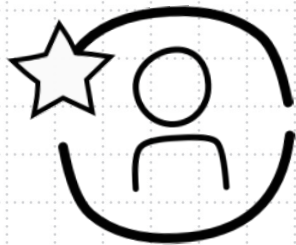
Notes:

Learn more about Red
Hat® OpenShift®

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

Learn more about IBM
Cloud - your platform for
digital transformation

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



Learn more about Watson® Services!

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

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IBM Customer Success

