# Customer Onboarding & Success

## 2024 America's Technical Partner Summit

Melissa Riner, Leader Customer Success
Armando Castilleja, Leader Customer Success & Escalation
Webex CC – America's

May 17th, 2024

# Agenda

- Customer Success Journey
- Customer Onboarding
- Partner’s Help & video Learning
- Best Practices & Considerations

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# Customer Success Journey

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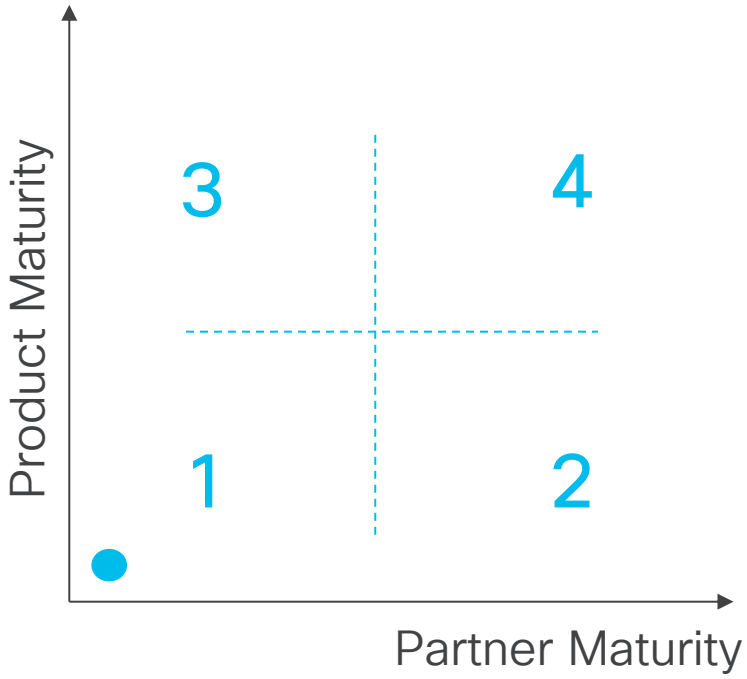
# Webex CC Journey

Maturity Graph




CarShield™

RITE AID

MEDSTAR MOBILE HEALTHCARE

FIRST HORIZON.

Love's

Springfield clinic

Tires LES SCHWAB

Airgas
an Air Liquide company

# Our Onboarding Journey

## Launch
2019

- Every deal gets a CSM to help with onboarding

## Expanded partner base
2021

- Expect partners to perform routine deployments
- CSM available to hand hold first two deployments

## Maturity & Scale
2022

- Partner experience, maturity & confidence
- PSM & Enablement Portal

## Momentum
2023 - 2024

- Partner Helpdesk
- Setup Assist
- Onboarding and Engagement Surveys
- Onboarding Assistant Launch
- No CSM for < 50 agents

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# Customer Onboarding

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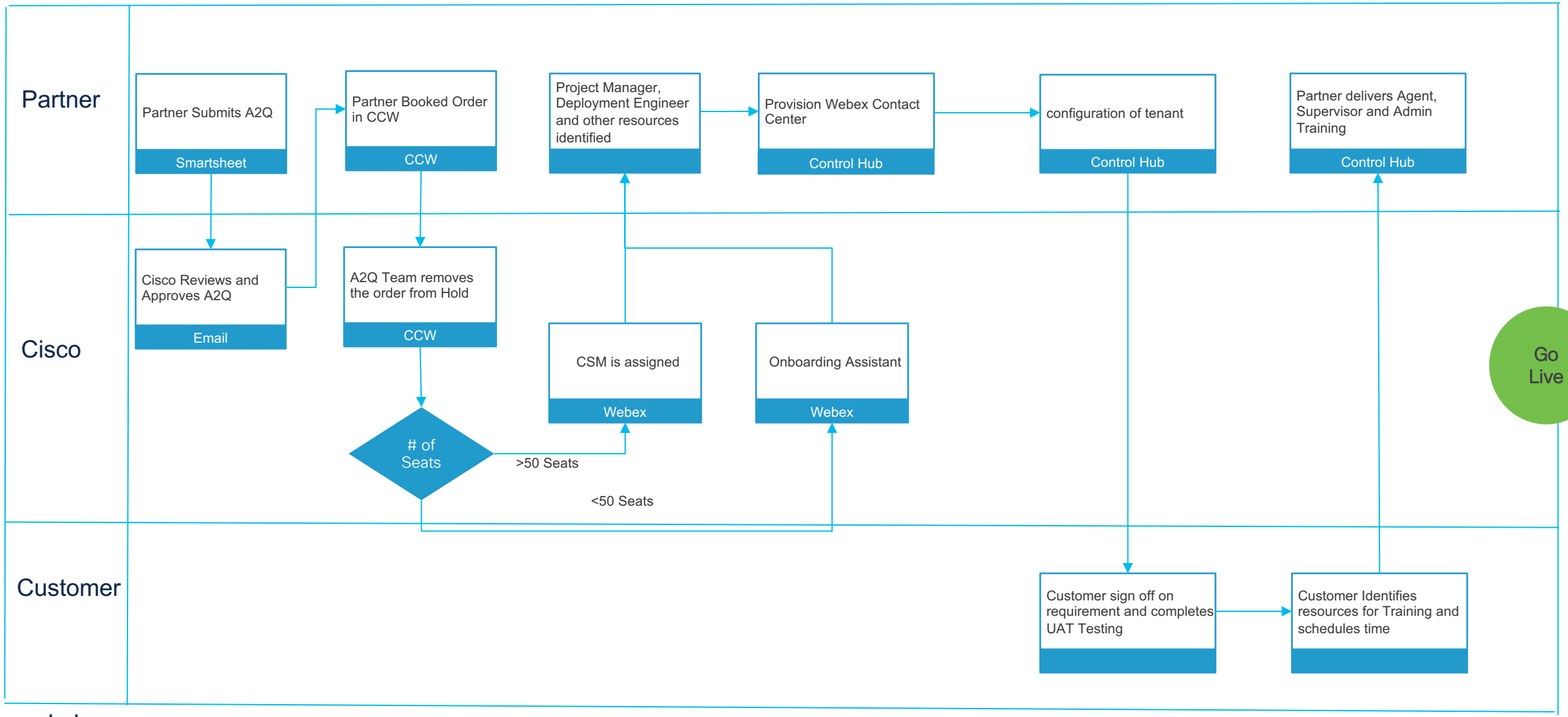
# Customer Onboarding Journey

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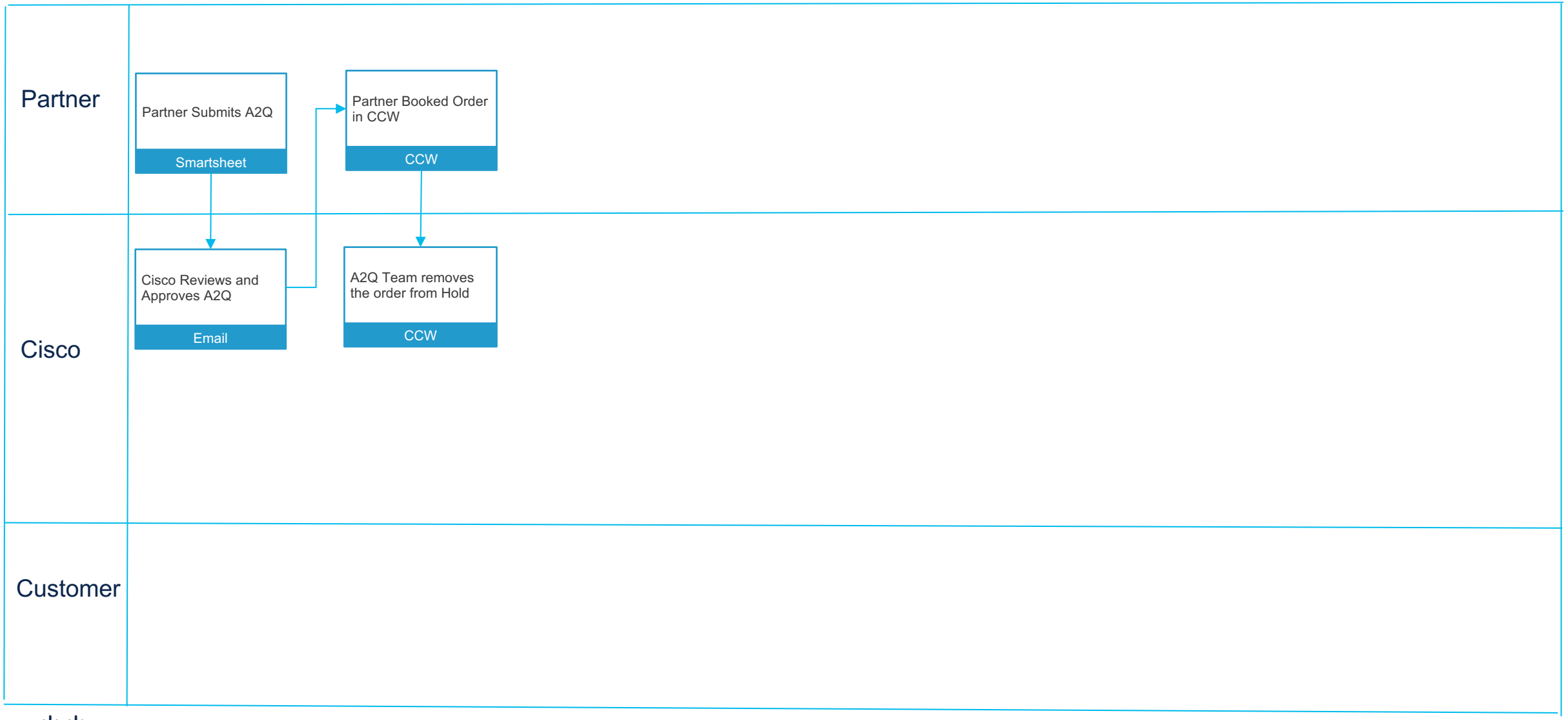
# Assurance to Quality

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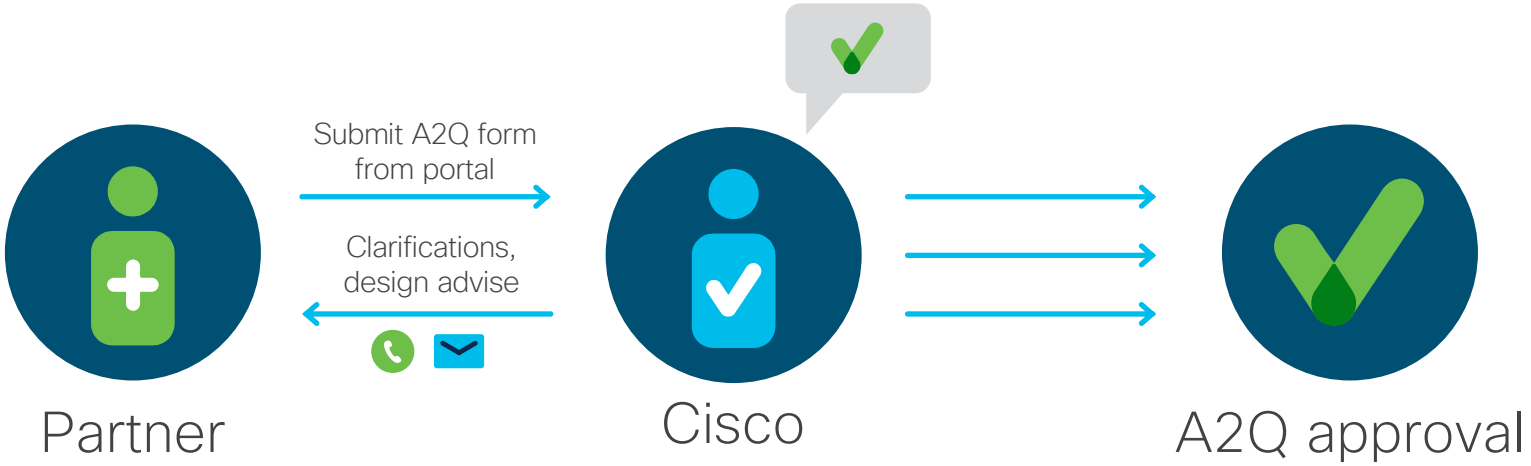
A2Q Form

# Assurance to Quality(A2Q)




Validate and release orders

CSM assigned after order released

Confirm Start Date and Target “Go Live”

- High level validation off design proposed
- Detailed design and workflow review

- Confirms expectations of the product deliverables
- Cisco confirmation that there will be no issues in the field

- Validates any Integrations requirements and realistic Target “Go Live” dates
- Detailed scripting or configuration overview

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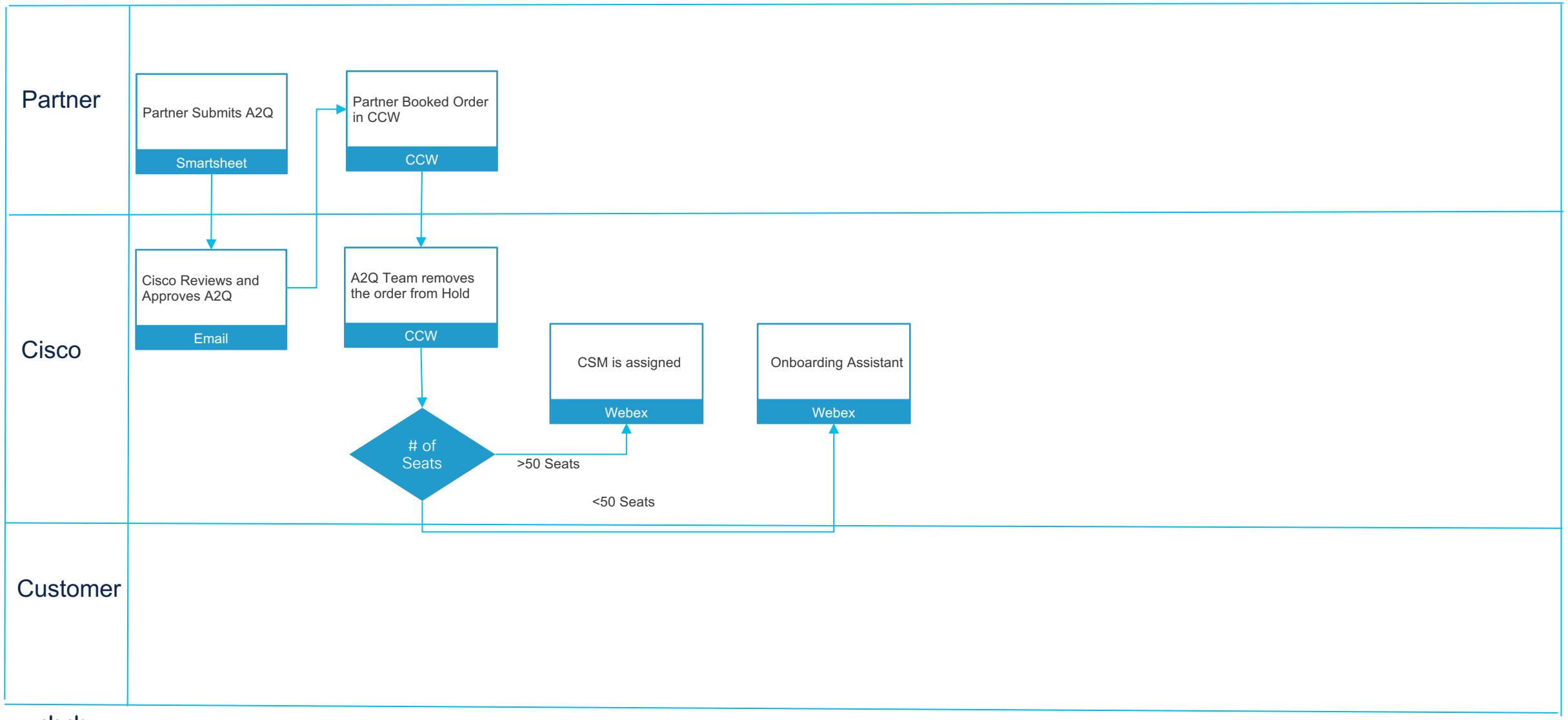
# Customer Onboarding Journey

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# US Customer Success Team

**Arvind IYER (arvenkat)**
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**Karthik Sundaram (karsund3)**
Director, Software Engineering

**Armando Castilleja (arcastil)**
Leader, Software Engineering

**Melissa Riner (mriner)**
Leader, Software Engineering

**Venkata Pruthvi (vpruthvi)**
Engineering Program Manager

**Wafik Hert (welherte)**
Engineering Program Manager

**Ilnur Nurushev (inurushe)**
Software Engineer

**Dave Easton (daveasto)**
Engineering Program Manager

**Tracey Martinez (tracmart)**
Engineering Program Manager

**Chuck Donato Jr (chdonato)**
Engineering Program Manager

**Siva Venkatesh Arcot (siarcot)**
Engineering Project Manager

**Tony Zouplna (tzouplna)**
Customer Success Manager

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Customer Success Manager

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**Kristy Kurtzman (kkurtzma)**
Collaboration Customer Success Engineer

**Alric James Jr. (alrjames)**
Engineering Project Manager

**Jesse Gazley (jgazley)**
Collaboration Customer Success Engineer

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# Onboarding Assistant

Onboarding Assistant is an In house developed automated tool specifically designed to guide partners meticulously through the customer onboarding process with comprehensive step-by-step instructions.

In the initial phase, all customers **with** fewer than 50 seats will be guided through the Onboarding Assistant.

Guides Partners through Onboarding

Intelligent Monitoring and Notification

Support Through PHD & CSM Team

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# Onboarding Assistant

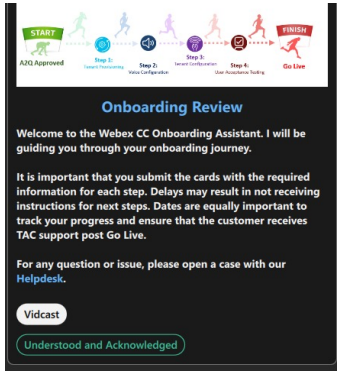
Dedicated Webex Space

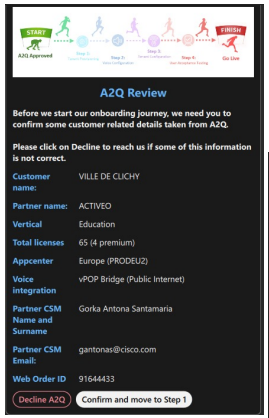
Step-By-step Instructions

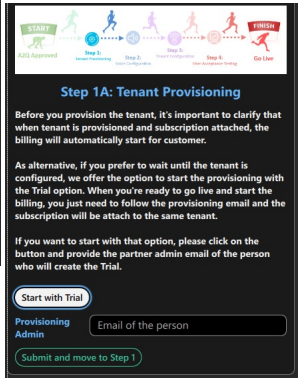
Reminders

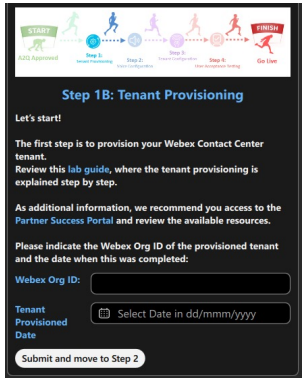
Real Time Monitoring

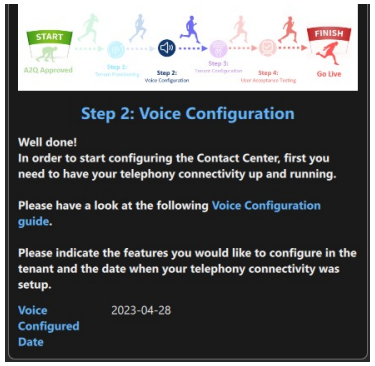
Support

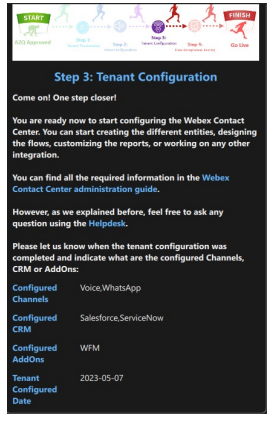


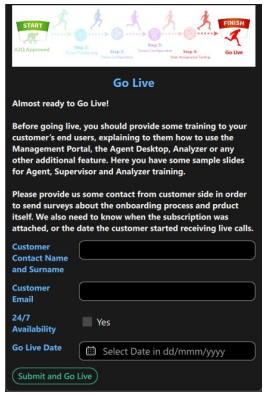



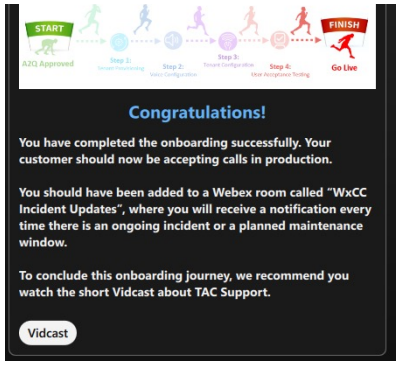



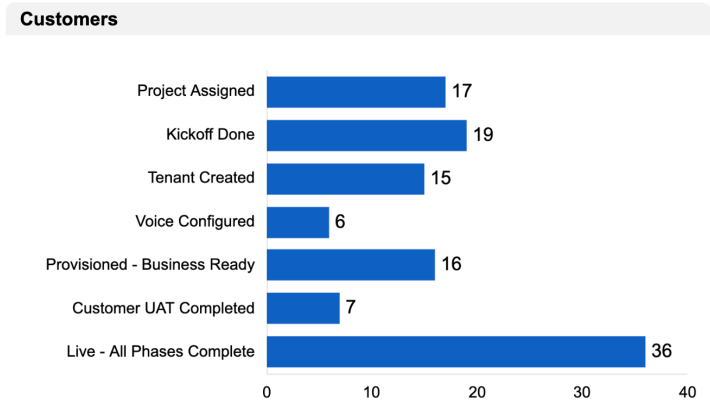

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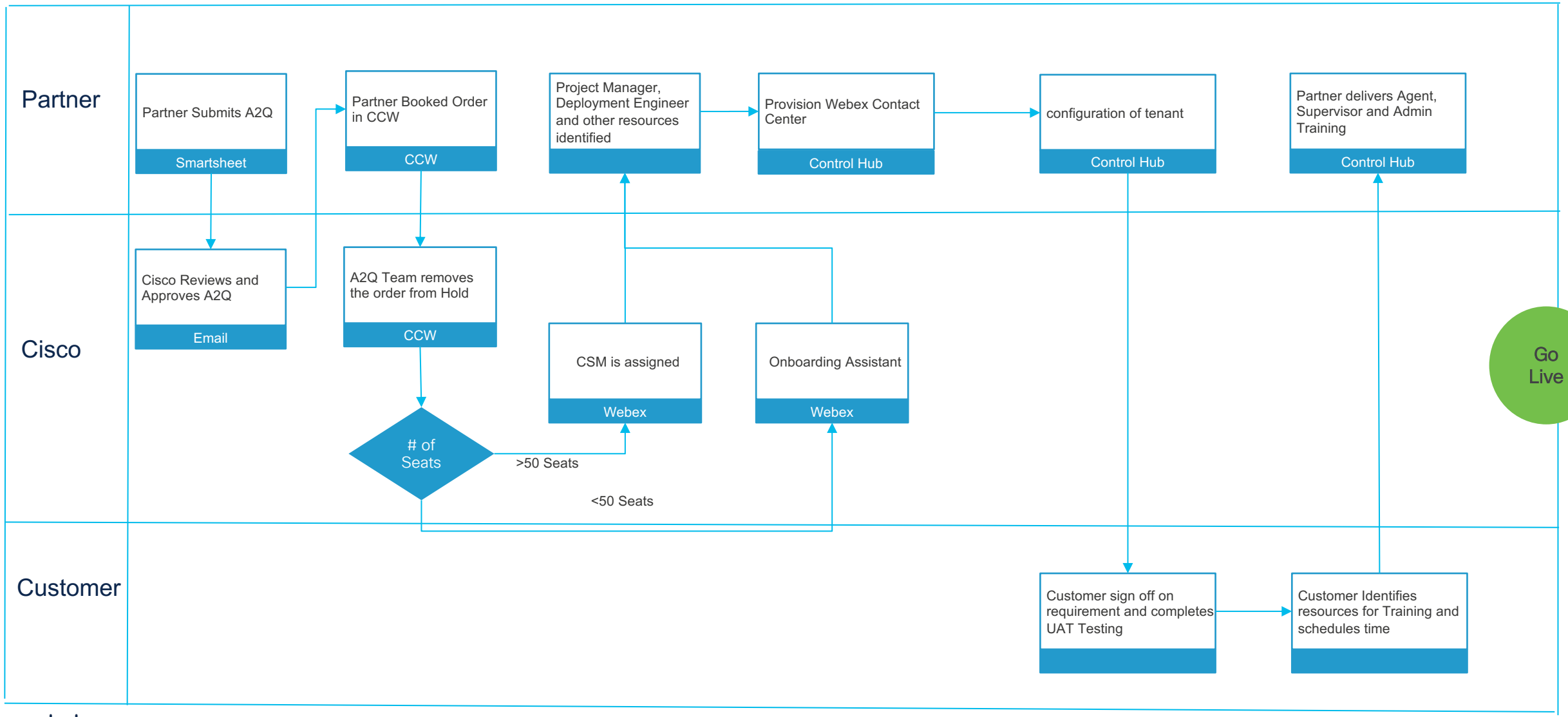
# Customer Onboarding Journey

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# Additional Information

All Cisco Sales Orders that contain Cisco Webex Contact Center SKU's will automatically go on **Pre-provisioning hold**. A2Q submission and approval for the deal is required before the hold can be released

Any modification that is made to existing subscription, will put the order to on hold.

- Send email to cjp-qualification@cisco.com to get this hold released. No A2Q is required in such modifications

G-CCAI provisioning request is required for CCAI provisioning

WFO Provisioning Request Form is required for WFO Provisioning

Aqueon Provisioning Request Form is required for Campaign Manager provisioning

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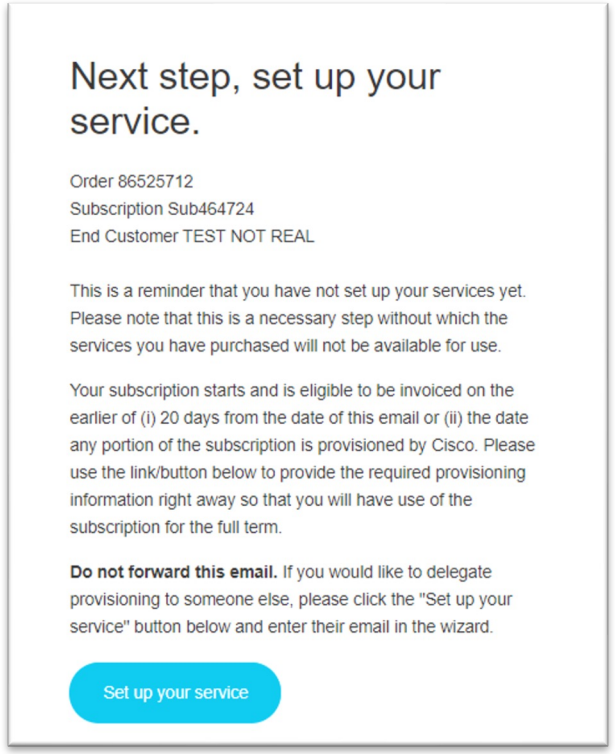
# Go-Live

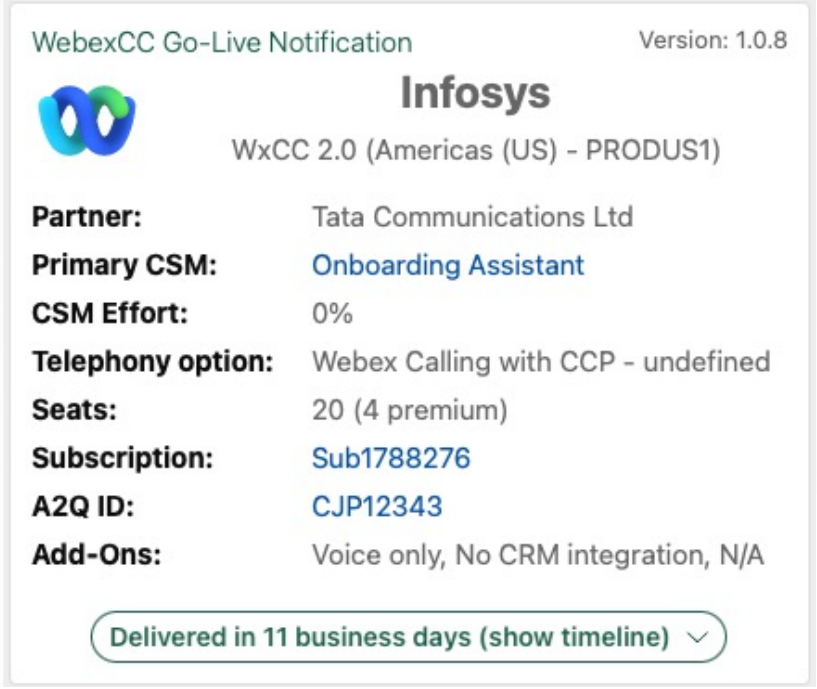
## Subscription Activation

Billing Starts



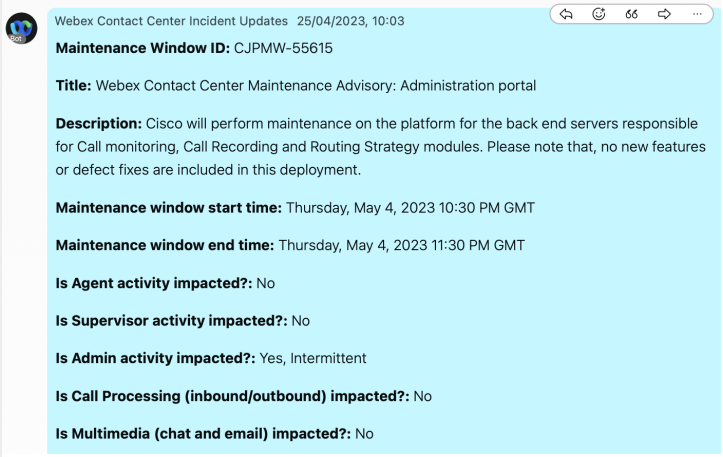

## Go-Live Notification

Internal teams are informed




## Incident Space

MW and Incident Notifications

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# Partner’s Help & video Learning

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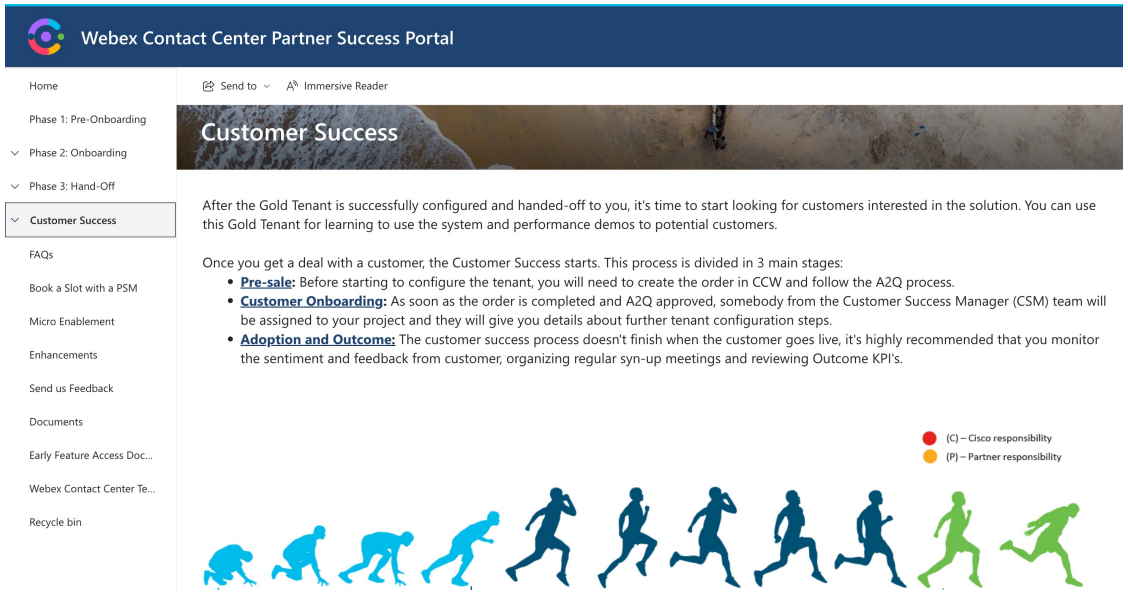
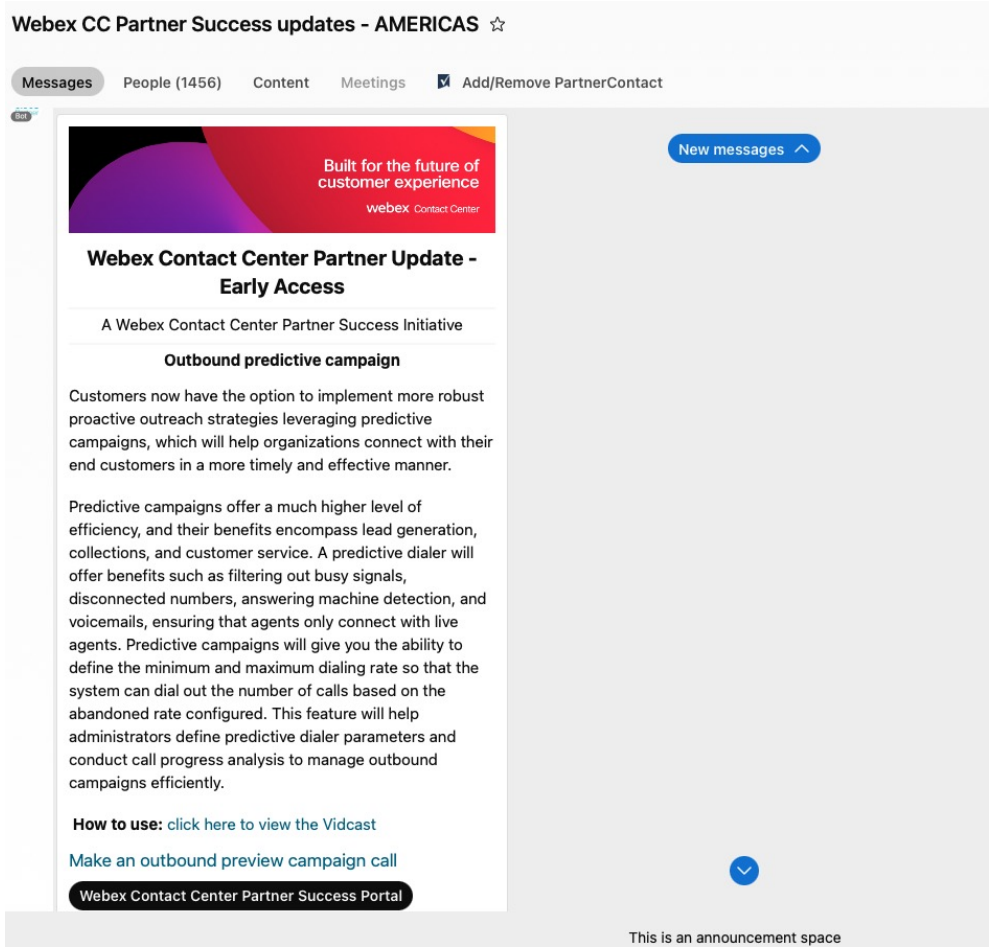
Partner Success Portal

# Join us!

## Partner Success Portal




## CNAAS – Americas

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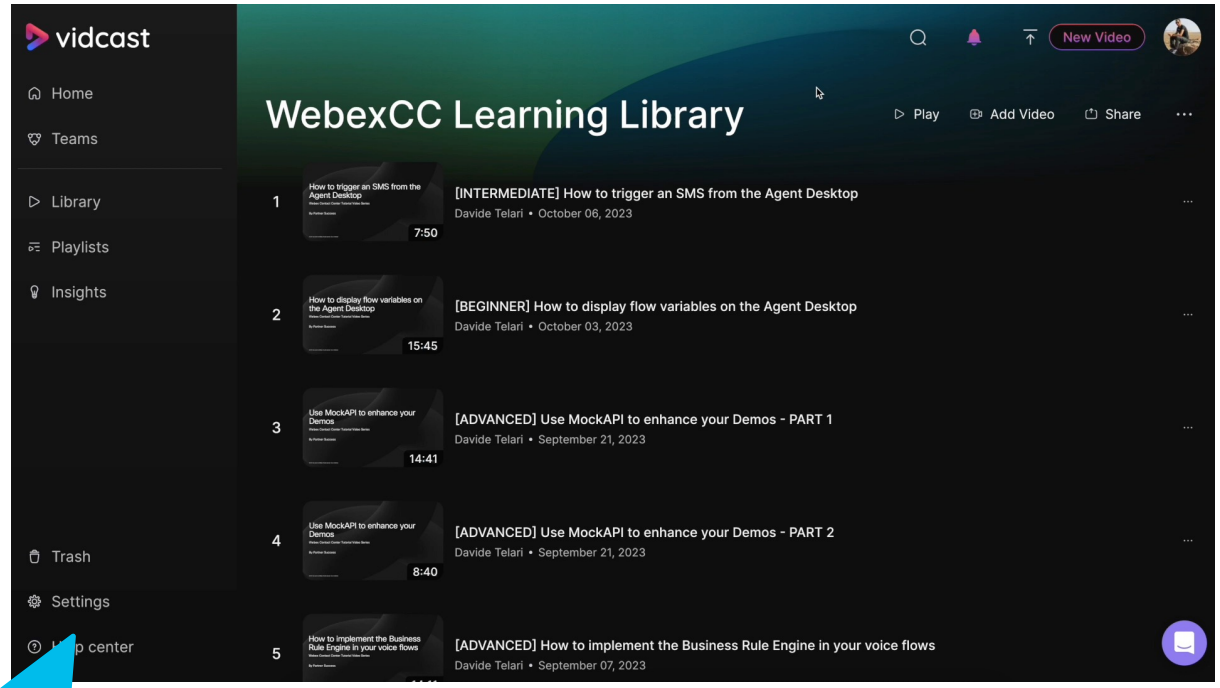
# Video Learning Library

*WHAT*: A knowledge-based video library serving all partners at any stage of their adoption journey with Webex Contact Center

*WHY*: ~500 partners onboarded (past 24 months). Today every partner has different technical expertise, needs, and objectives, but all want an easy-to-implement solution.

*HOW*: Provide quick step-by-step deployment guides, to build simple and complex demo scenarios in their Gold Tenants.




New videos published every week!

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# Best Practices & Considerations

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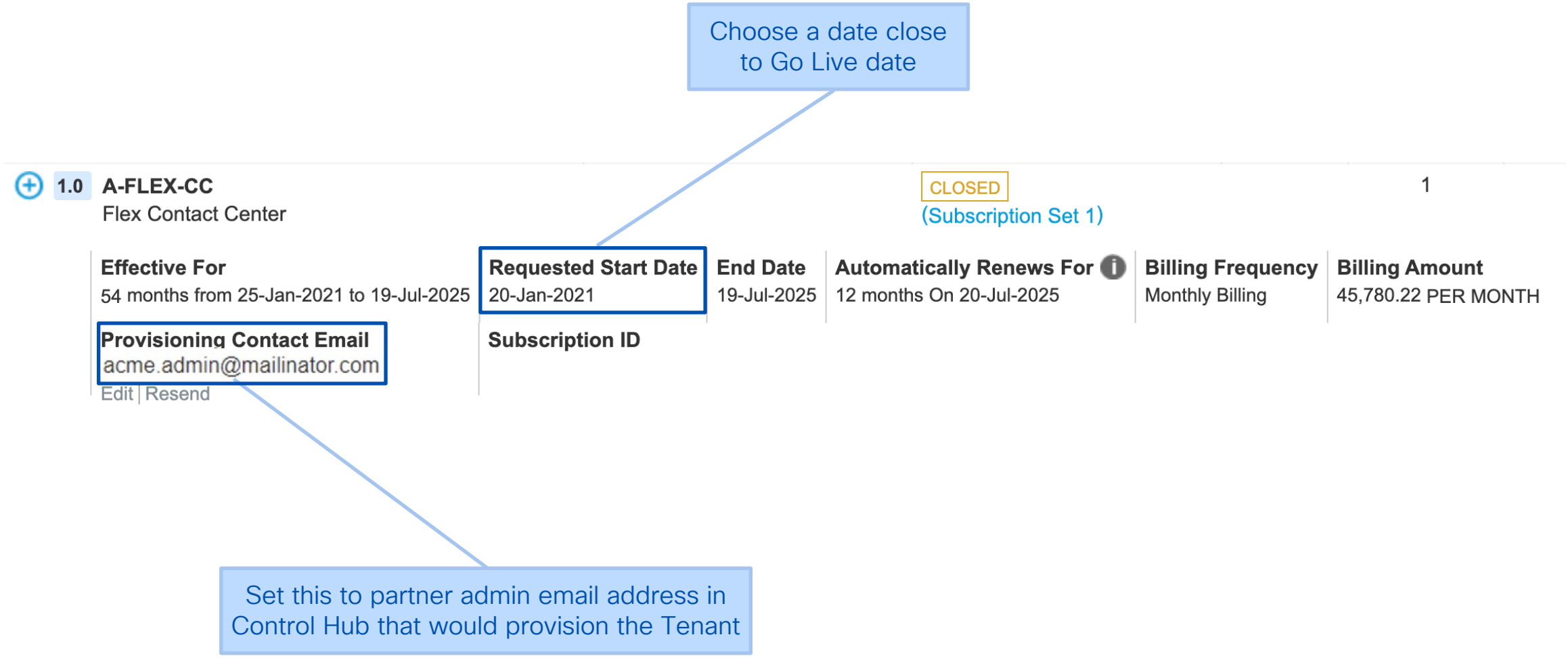
# Ordering

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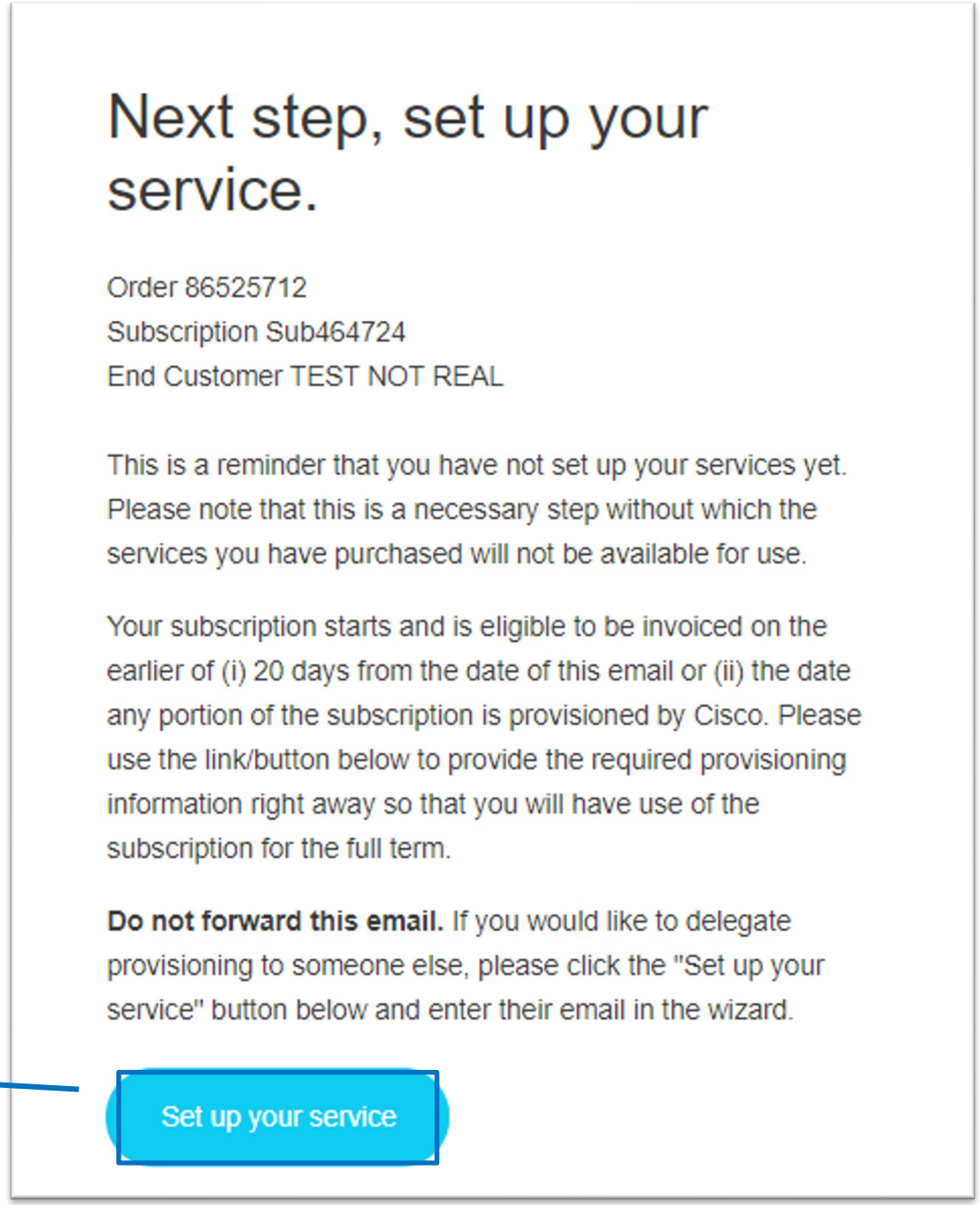
# Provisioning email

A2Q Approved ✓

&

Requested Start Day ✓

Billing Starts

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# Tenant Provisioning

[Data Locality in Webex CC]

## Set up your Contact Centre tenant

Select the country and timezone of the region where your Contact Centre is operating.

Country or region

Netherlands

Timezone

(GMT+01:00) Europe/Berlin

Both Control Hub and Webex Connect use this timezone. You can't change it once submitted.

### Data Locality in Webex Contact Center

This article lists the data centers that are used to provision Webex Contact Center tenants. The data center for a tenant is decided based on the Country of Operation that you select in the Set-Up wizard.

| | | |
|---|---|---|
| **Australia** | | |
| 1 | Australia | Australia |
| 2 | Indonesia | Australia |
| 3 | Jordan | Australia |
| 4 | Malaysia | Australia |
| 5 | New Zealand | Australia |
| 6 | Philippines | Australia |
| 7 | Singapore | Australia |
| 8 | South Korea | Australia |
| 9 | Thailand | Australia |
| 10 | Vietnam | Australia |
| **Japan** | | |
| 1 | Japan | Japan |

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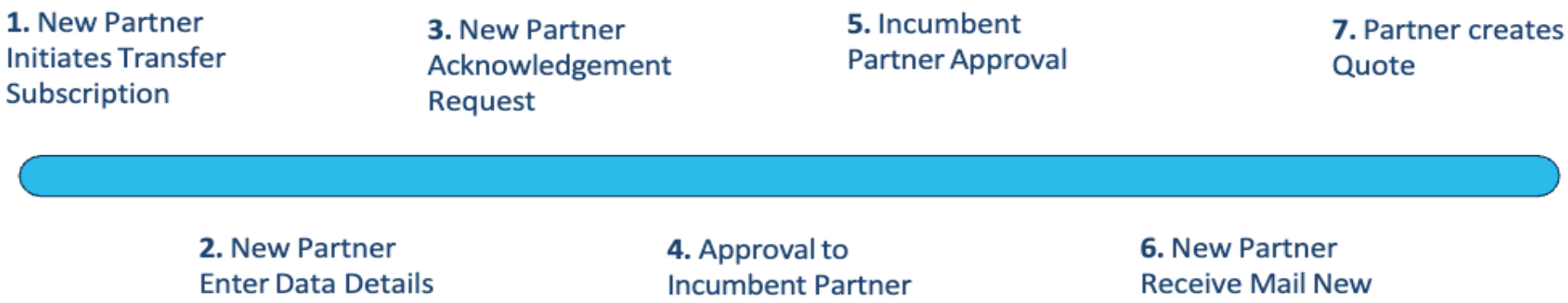
# P2P Process Steps in CCW (Self-Serve)




- URL P2P Process
- For help with the Ordering process or P2P open a case at https://customerservice.cloudapps.cisco.com/ on the search bar type ”P2P TRANSFER”

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CISCO
The bridge to possible