



# Customer Onboarding & Success

2024 America's Technical Partner Summit

Melissa Riner, Leader Customer Success

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Webex CC – America's

May 17th, 2024

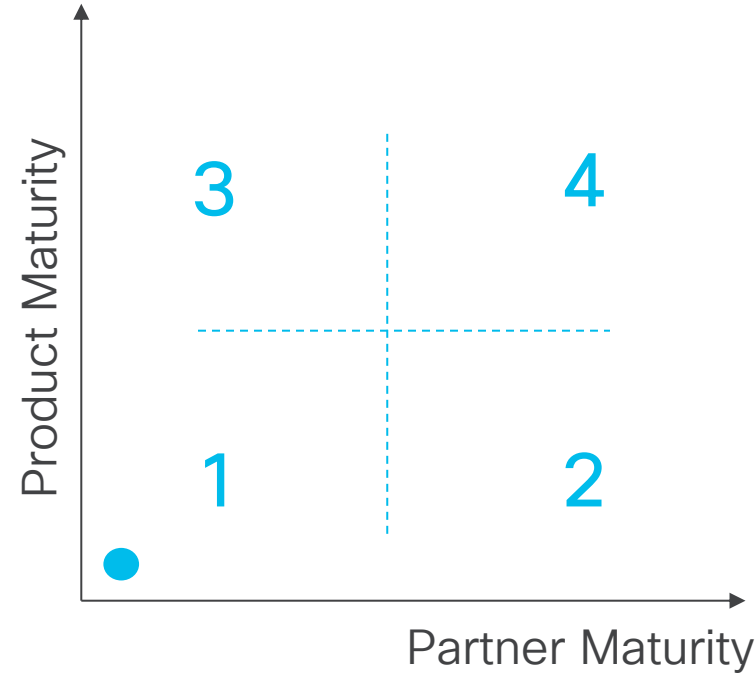
# Agenda

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

# Customer Success Journey

# Webex CC Journey

Maturity Graph



# 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

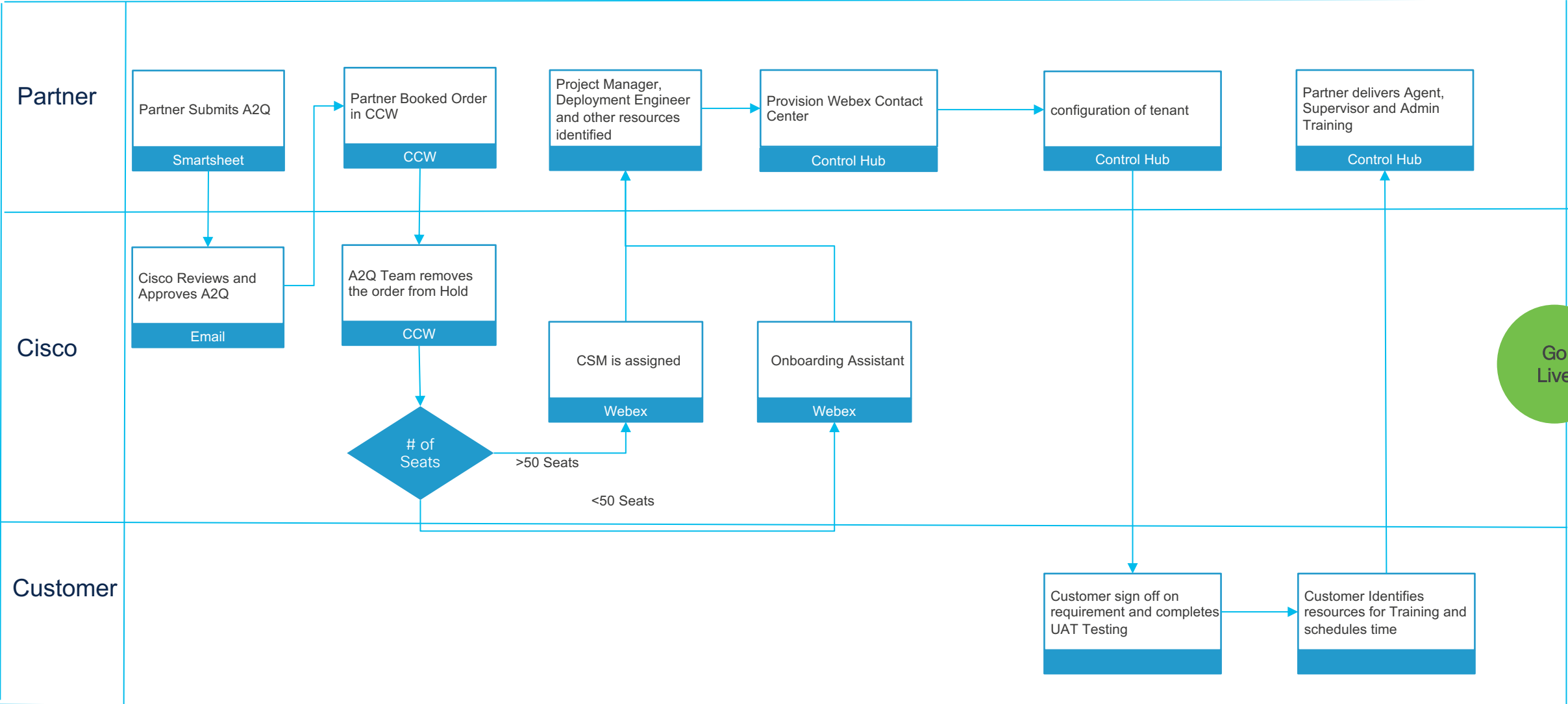
- Partner experience, maturity & confidence
- PSM & Enablement Portal

Momentum  
2023 - 2024

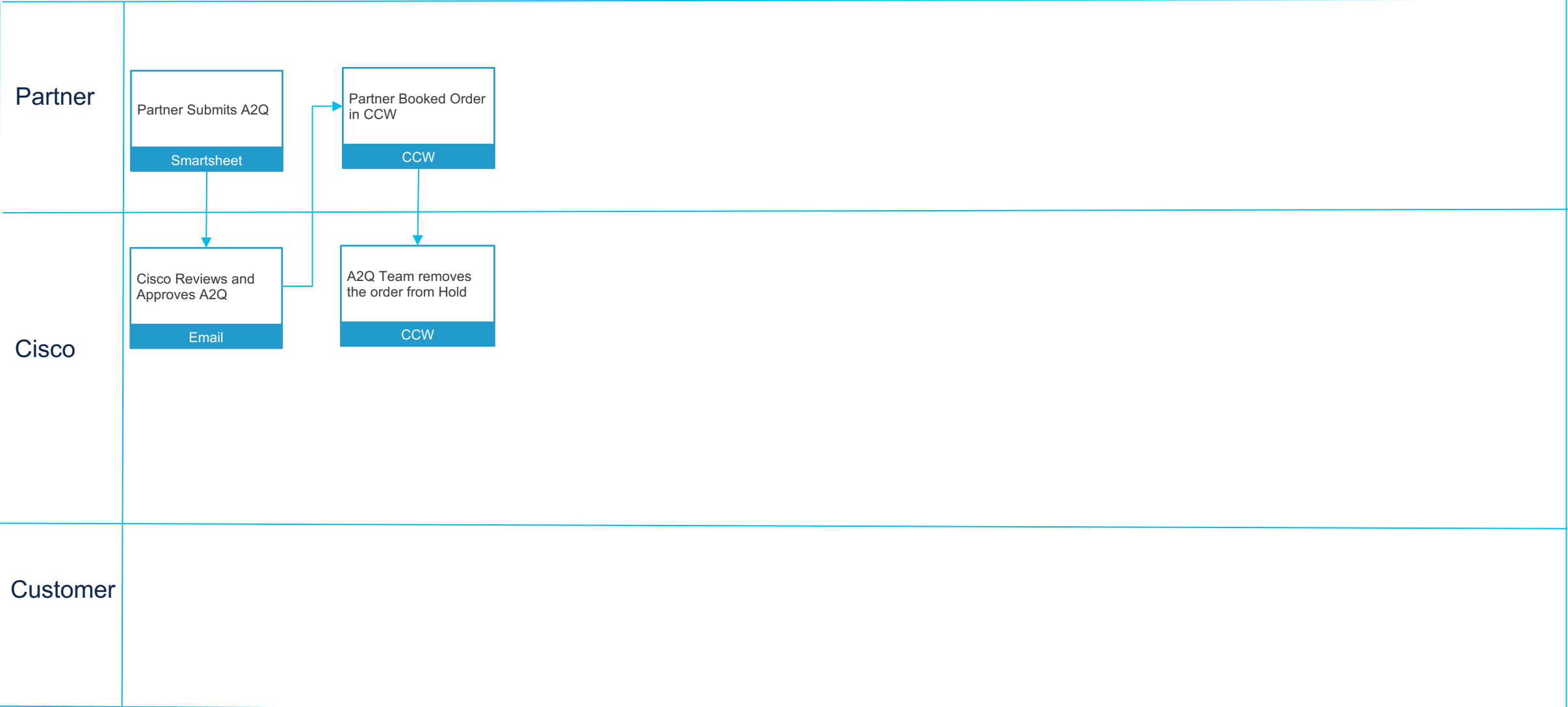
- Partner Helpdesk
- Setup Assist
- Onboarding and Engagement Surveys
- Onboarding Assistant Launch
- No CSM for < 50 agents

# Customer Onboarding

# Customer Onboarding Journey



# Assurance to Quality

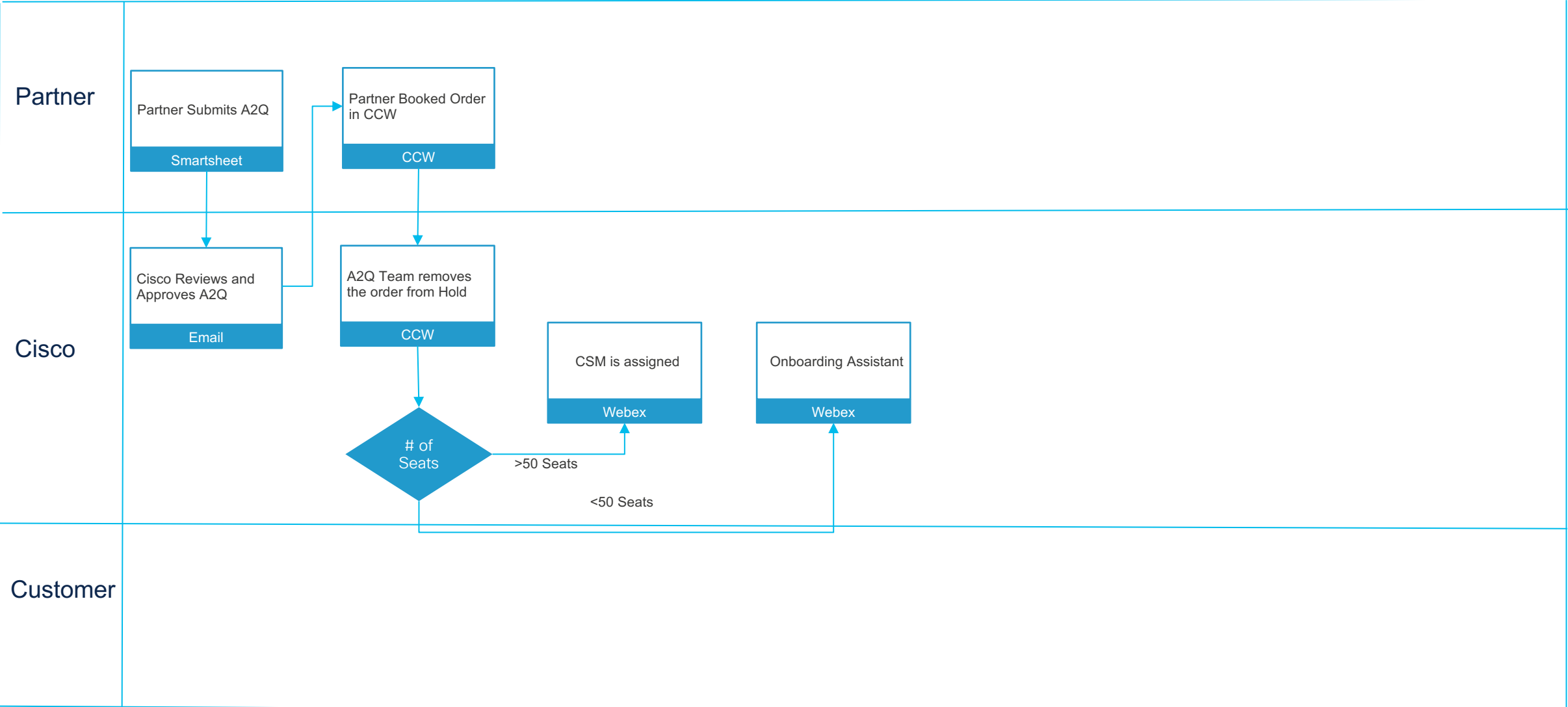




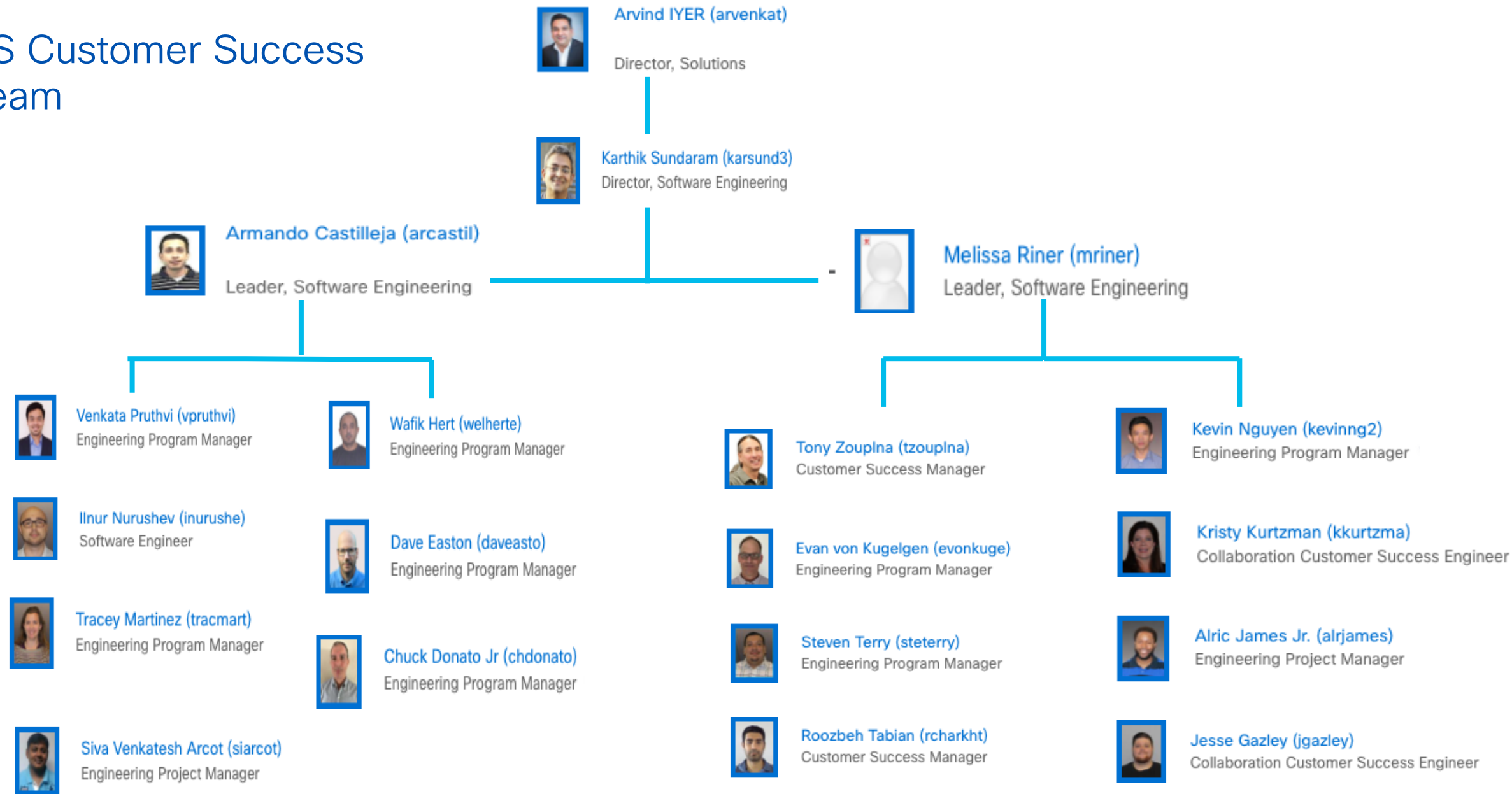
# Assurance to Quality(A2Q)



# Customer Onboarding Journey



# US Customer Success Team



# 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

# Onboarding Assistant

Dedicated Webex Space

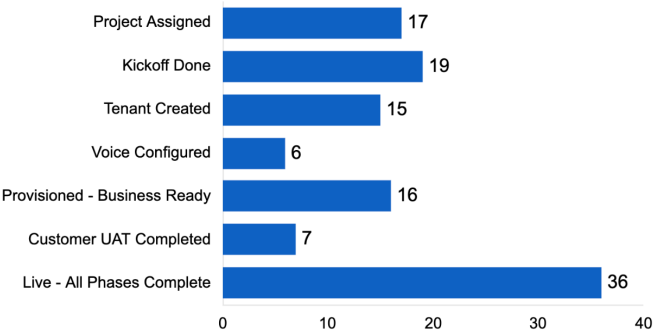
Step-By-step Instructions

Reminders

Real Time Monitoring

Support

## Customers



**Onboarding Review**

Welcome to the Webex CC Onboarding Assistant. I will be guiding you through your onboarding journey.

It is important that you submit the cards with the required information for each step. Delays may result in not receiving instructions for next steps. Dates are equally important to track your progress and ensure that the customer receives TAC support post Go Live.

For any question or issue, please open a case with our Helpdesk.

**Vidcast**

**Understood and Acknowledged**

**A2Q Review**

Before we start our onboarding journey, we need you to confirm some customer related details taken from A2Q.

Please click on Decline to reach us if some of this information is not correct.

Customer name: VILLE DE CLICHY

Partner name: ACTIVEO

Vertical: Education

Total licenses: 65 (4 premium)

Appcenter: Europe (PRODSU2)

Voice integration: vPOP Bridge (Public Internet)

Partner CSM Name and Surname: Gorka Antona Santamaría

Partner CSM Email: gantonas@cisco.com

Web Order ID: 91644433

**Decline A2Q** **Confirm and move to Step 1**

**Step 1A: Tenant Provisioning**

Before you provision the tenant, it's important to clarify that when tenant is provisioned and subscription attached, the billing will automatically start for customer.

As alternative, if you prefer to wait until the tenant is configured, we offer the option to start the provisioning with the Trial option. When you're ready to go live and start the billing, you just need to follow the provisioning email and the subscription will be attach to the same tenant.

If you want to start with that option, please click on the button and provide the partner admin email of the person who will create the Trial.

**Start with Trial**

Provisioning Admin

**Submit and move to Step 1**

**Step 1B: Tenant Provisioning**

Let's start!

The first step is to provision your Webex Contact Center tenant. Review this lab guide, where the tenant provisioning is explained step by step.

As additional information, we recommend you access to the Partner Success Portal and review the available resources.

Please indicate the Webex Org ID of the provisioned tenant and the date when this was completed:

Webex Org ID:

Tenant Provisioned Date

**Submit and move to Step 2**

**Step 2: Voice Configuration**

Well done!

In order to start configuring the Contact Center, first you need to have your telephony connectivity up and running.

Please have a look at the following Voice Configuration guide.

Please indicate the features you would like to configure in the tenant and the date when your telephony connectivity was setup.

Voice Configured Date

**Step 3: Tenant Configuration**

Come on! One step closer!

You are ready now to start configuring the Webex Contact Center. You can start creating the different entities, designing the flows, customizing the reports, or working on any other integration.

You can find all the required information in the Webex Contact Center administration guide.

However, as we explained before, feel free to ask any question using the Helpdesk.

Please let us know when the tenant configuration was completed and indicate what are the configured Channels, CRM or AddOns:

Configured Channels: Voice,WhatsApp

Configured CRM: Salesforce.ServiceNow

Configured AddOns: WFM

Tenant Configured Date: 2023-05-07

**Go Live**

Almost ready to Go Live!

Before going live, you should provide some training to your customer's end users, explaining to them how to use the Management Portal, the Agent Desktop, Analyzer or any other additional feature. Here you have some sample slides for Agent, Supervisor and Analyzer training.

Please provide us some contact from customer side in order to send surveys about the onboarding process and product itself. We also need to know when the subscription was attached, or the date the customer started receiving live calls.

Customer Contact Name and Surname:

Customer Email:

24/7 Availability: ☒ Yes

Go Live Date:

**Submit and Go Live**

**Congratulations!**

You have completed the onboarding successfully. Your customer should now be accepting calls in production.

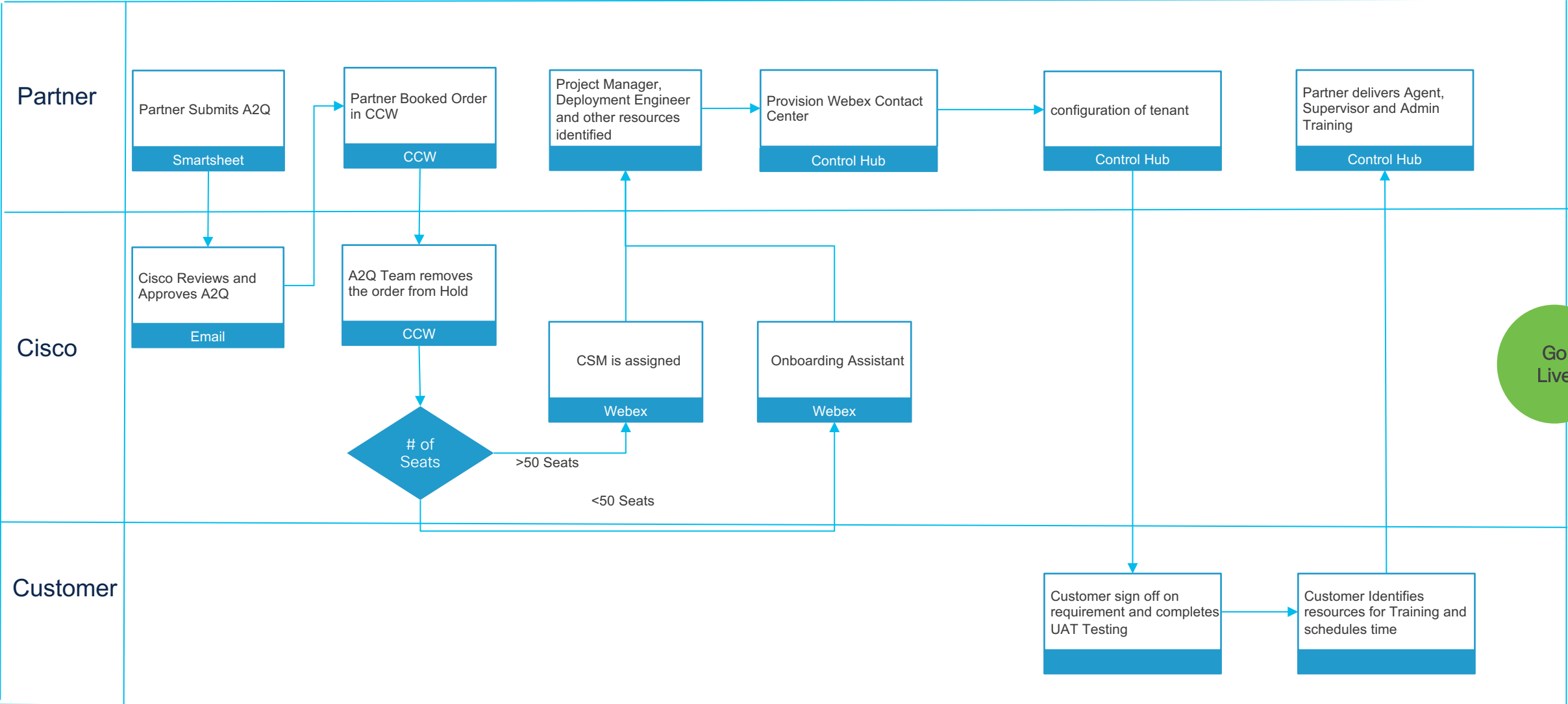
You should have been added to a Webex room called "WxCC Incident Updates", where you will receive a notification every time there is an ongoing incident or a planned maintenance window.

To conclude this onboarding journey, we recommend you watch the short Vidcast about TAC Support.

**Vidcast**



# Customer Onboarding Journey



# 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

[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

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

- Send email to [cjp-qualification@cisco.com](mailto:cjp-qualification@cisco.com) to get this hold released. No A2Q is required in such modifications

# Go-Live

## Subscription Activation

Billing Starts

Next step, set up your service.

Order 86525712  
Subscription Sub464724  
End Customer TEST NOT REAL

This is a reminder that you have not set up your services yet. Please note that this is a necessary step without which the services you have purchased will not be available for use.

Your subscription starts and is eligible to be invoiced on the earlier of (i) 20 days from the date of this email or (ii) the date any portion of the subscription is provisioned by Cisco. Please use the link/button below to provide the required provisioning information right away so that you will have use of the subscription for the full term.

**Do not forward this email.** If you would like to delegate provisioning to someone else, please click the "Set up your service" button below and enter their email in the wizard.


Set up your service

## Go-Live Notification

Internal teams are informed

WebexCC Go-Live Notification

Version: 1.0.8



Infosys

WxCC 2.0 (Americas (US) - PRODUS1)

Partner:

Tata Communications Ltd

Primary CSM:

Onboarding Assistant

CSM Effort:

0%

Telephony option:

Webex Calling with CCP - undefined

Seats:

20 (4 premium)

Subscription:

Sub1788276

A2Q ID:

CJP12343

Add-Ons:

Voice only, No CRM integration, N/A

Delivered in 11 business days (show timeline)

## Incident Space

MW and Incident Notifications

Webex Contact Center Incident Updates 25/04/2023, 10:03

Maintenance Window ID: CJP12343

Title: Webex Contact Center Maintenance Advisory: Administration portal

Description: Cisco will perform maintenance on the platform for the back end servers responsible for Call monitoring, Call Recording and Routing Strategy modules. Please note that, no new features or defect fixes are included in this deployment.

Maintenance window start time: Thursday, May 4, 2023 10:30 PM GMT

Maintenance window end time: Thursday, May 4, 2023 11:30 PM GMT

Is Agent activity impacted?: No

Is Supervisor activity impacted?: No

Is Admin activity impacted?: Yes, Intermittent

Is Call Processing (inbound/outbound) impacted?: No


Is Multimedia (chat and email) impacted?: No



# Partner's Help & video Learning

Join us!

# Partner Success Portal



Webex Contact Center Partner Success Portal

Home

Phase 1: Pre-Onboarding

Phase 2: Onboarding

Phase 3: Hand-Off

Customer Success

FAQs

Book a Slot with a PSM

Micro Enablement

Enhancements



Send us Feedback

Documents

Early Feature Access Doc...

Webex Contact Center Te...

Recycle bin

 Send to  Immersive Reader

## Customer Success


After the Gold Tenant is successfully configured and handed-off to you, it's time to start looking for customers interested in the solution. You can use this Gold Tenant for learning to use the system and performance demos to potential customers.

Once you get a deal with a customer, the Customer Success starts. This process is divided in 3 main stages:

- Pre-sale:** Before starting to configure the tenant, you will need to create the order in CCW and follow the A2Q process.
- Customer Onboarding:** As soon as the order is completed and A2Q approved, somebody from the Customer Success Manager (CSM) team will be assigned to your project and they will give you details about further tenant configuration steps.
- Adoption and Outcome:** The customer success process doesn't finish when the customer goes live, it's highly recommended that you monitor the sentiment and feedback from customer, organizing regular syn-up meetings and reviewing Outcome KPI's.

(C) – Cisco responsibility

(P) – Partner responsibility



# CNAAS – Americas

Webex CC Partner Success updates - AMERICAS ☆

Messages


People (1456)

Content

Meetings

☒ Add/Remove PartnerContact

New messages ^



### Webex Contact Center Partner Update - Early Access

A Webex Contact Center Partner Success Initiative

#### Outbound predictive campaign

Customers now have the option to implement more robust proactive outreach strategies leveraging predictive campaigns, which will help organizations connect with their end customers in a more timely and effective manner.

Predictive campaigns offer a much higher level of efficiency, and their benefits encompass lead generation, collections, and customer service. A predictive dialer will offer benefits such as filtering out busy signals, disconnected numbers, answering machine detection, and voicemails, ensuring that agents only connect with live agents. Predictive campaigns will give you the ability to define the minimum and maximum dialing rate so that the system can dial out the number of calls based on the abandoned rate configured. This feature will help administrators define predictive dialer parameters and conduct call progress analysis to manage outbound campaigns efficiently.

**How to use:** [click here to view the Vidcast](#)

[Make an outbound preview campaign call](#)

Webex Contact Center Partner Success Portal

This is an announcement space

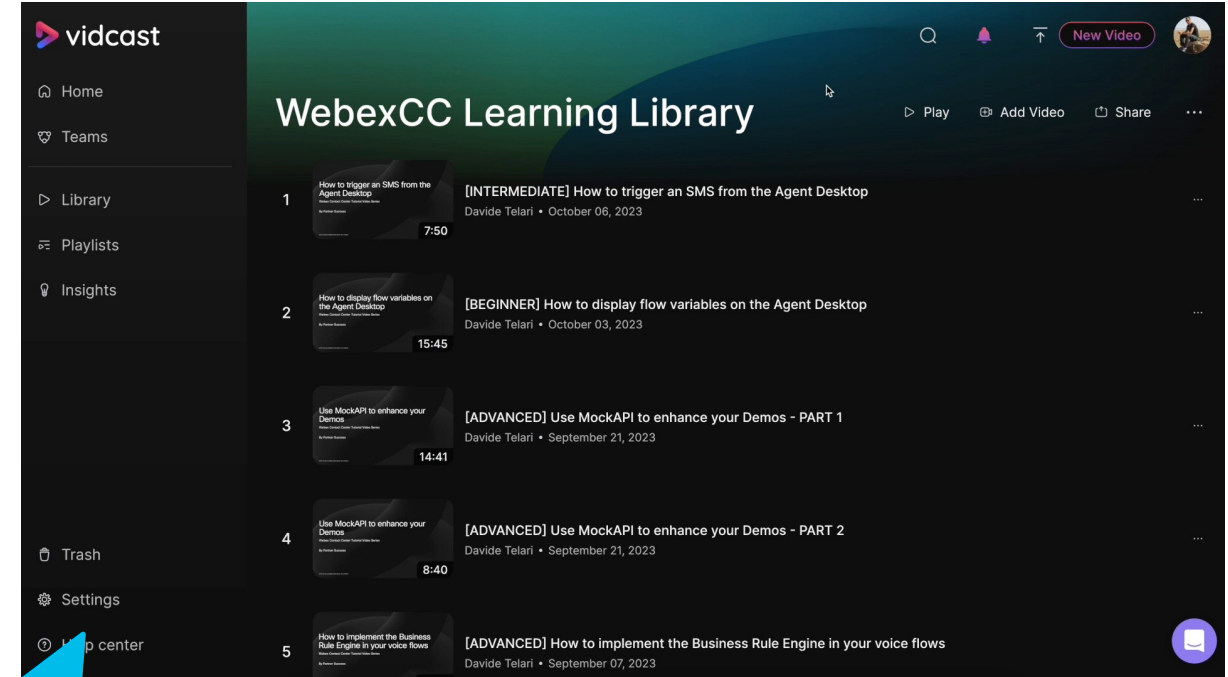
# Video Learning Library



**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!



# Best Practices & Considerations

# Ordering

Choose a date close to Go Live date

1.0

A-FLEX-CC

Flex Contact Center

CLOSED

(Subscription Set 1)

1

Effective For

54 months from 25-Jan-2021 to 19-Jul-2025

Requested Start Date

20-Jan-2021

End Date

19-Jul-2025

Automatically Renews For

12 months On 20-Jul-2025

Billing Frequency

Monthly Billing

Billing Amount

45,780.22 PER MONTH

Provisioning Contact Email

acme.admin@mailinator.com

Subscription ID

Edit

Resend

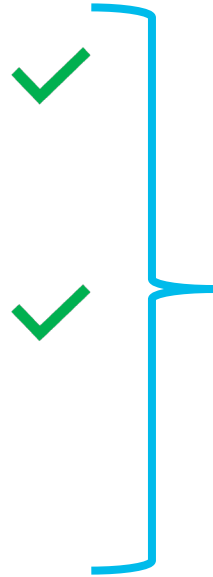
Set this to partner admin email address in Control Hub that would provision the Tenant

# Provisioning email

A2Q Approved

&

Requested Start Day



Billing Starts



## Next step, set up your service.

Order 86525712

Subscription Sub464724

End Customer TEST NOT REAL

This is a reminder that you have not set up your services yet. Please note that this is a necessary step without which the services you have purchased will not be available for use.

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**Do not forward this email.** If you would like to delegate provisioning to someone else, please click the "Set up your service" button below and enter their email in the wizard.

Set up your service

# Tenant Provisioning

## 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

## P2P Process Steps in CCW (Self-Serve)

**1. New Partner  
Initiates Transfer  
Subscription**

**3. New Partner  
Acknowledgement  
Request**

**5. Incumbent  
Partner Approval**

**7. Partner creates  
Quote**

**2. New Partner  
Enter Data Details**

**4. Approval to  
Incumbent Partner**

**6. New Partner  
Receive Mail New**

- 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"





The bridge to possible