BRINGING THE MERAKI EXPERIENCE TO THE DATA CENTER

CLOUD-BASED MANAGEMENT.
A LEVEL UP.

APPLYING THE CISCO CX METHODOLOGY TO INTERSIGHT: A STEP-BY-STEP GUIDE

Align · Purchase · Advocate · Recommend · Renew · Select · Optimize · Evaluate · Accelerate · Customers · Adopt · Engage · Need · Onboard · Implement · Use

By applying the CX methodology to your Intersight sales, you'll help improve your customer retention and upsell opportunities.

Pit stop #1: NEED

Selling Cisco Intersight begins with recognizing your customer's need to manage its infrastructure remotely via a simple, convenient secure interface.

Four key reasons to use Intersight are:

1. Simple infrastructure management
2. Automated configuration and provisioning
3. Proactive support
4. Built-in security assuredness

Ingram Micro partners can engage our IM Technology Consultants and Solution Design & Services (SD&S) team to ensure technology solutions address your customers' true business needs and outcomes.

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Pit stop #2: **EVALUATE**

The Base version of Intersight is always free to use. Just go to Intersight.com to create your free account.

For the Premier version of Intersight, a 90-day free trial is available here.

Contact the Ingram Micro Business Transformation Center (BTC) for assistance, including product and solution demonstrations and expert guidance to meet customer business outcomes. You can also email us at BTC@ingrammicro.com.

Pit stop #3: **SELECT**

Now that you've selected Intersight as your solution, you need to select the appropriate tier: Base, Essentials, Advantage or Premier.

Reference Cisco's Table of Features to compare the various tiers easily and choose the best fit.

Partners also can contact the Ingram Micro SD&S team for pre-sales design, Cisco bill of materials and IM quotes: (800) 445-5066, ext. 76701

Pit stop #4: **ALIGN**

Ensuring your sales team, customer, Cisco account manager and Cisco partner account manager (PAM) are all on the same page before proceeding to the next step will save you from wasting time with product returns and reevaluations down the road.

Pit stop #5: **PURCHASE**

- The customer purchases the solution based on their business needs.
- The partner creates a deal ID with a valid BOM (bill of materials).
- The purchase order (PO) should include a valid Deal ID and smart account information.
- The partner submits the PO to Ingram Micro Software Desk to process with Cisco.

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Pit stop #6: ONBOARD

Now that your end customer has purchased Cisco Intersight, you should identify and align their expected outcomes and begin compiling your success plan.

The Intersight Help Center is the perfect place to learn how to get started with Intersight, explore the features, find links to resources, interact with the Intersight community and more.

The Intersight Help Center offers a complete set of onboarding videos and walkthroughs. It also has an in-depth set of resources on many different topics, such as:

- HX cluster deployment
- Upgrading HyperFlex
- Advisories
- IP access management
- Intersight supported product identification standards
- Installing an OS

Leverage Ingram Micro's Technology Consultants, Business Transformation Center (BTC) and Cisco Virtual Learning for educational training and demos on Cisco products and solution enablement.

Pit stop #7: IMPLEMENT

Implement Intersight by setting up and claiming devices. Follow Cisco's fully detailed walkthrough.

To get started with Cisco Intersight, follow these three steps:

1. **Create a Cisco Intersight account**—Visit Intersight.com to create an account. You must have a valid Cisco ID to create an account; if you don't have one, create one here.

2. **Claim a new device**—From the *Devices* details page, click *Claim a New Device*, and complete the following steps to claim one or more devices to be managed by Cisco Intersight:

   a. *Enter the Device ID.* Endpoint devices connect to the Cisco Intersight portal through a Device Connector embedded in the management controller (Management VM for Cisco UCS Director) of each system. The Device Connector provides a secure way for internet-connected devices to send information and receive control instructions from the Intersight portal.

   b. *Enter the device claim code and click Claim.* You can find this code in the Device Connector for the device type.

   Note: Before gathering the claim code, ensure that the Device Connector has outbound network access to Cisco Intersight and is in the *Not Claimed* state.

3. **Add users**—From Settings, select *Users > Add New User > Add User,* provide the Cisco ID of the user and select a user role. You can select a read-only or an admin role for the new user. For more assistance with claiming a device and adding a new user, follow the guided help in Cisco Intersight.

For more information about enabling Intersight management and configuring the Device Connector on the Management Interfaces, see the appropriate documentation below:

- Cisco UCS Manager Administration Guide
- Cisco UCS C-Series Integrated Management Controller GUI Configuration Guide
- Cisco HyperFlex Systems Installation Guide for Cisco Intersight
- Cisco UCS Director Administration Guide
- Cisco Network Insights Documentation

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Pit stop #8: USE

After deployment, it's vital to ensure correct setup and to be available to answer additional questions discovered during the initial launch of the technology.

Begin using Intersight for remote deployment, configuration and ongoing maintenance.

After purchasing and activating additional licenses from the Cisco Smart Licensing portal, click the Refresh icon in the Subscription pane to sync the licensing status in the portal.

Validate License option displays

- **Not Used**—This status is displayed when the server count in a license tier is 0.

- **In Compliance**—The account licensing state is in compliance and all the supported features are available to the users.

- **Out of Compliance**—The account license status displays Out of Compliance in the following cases:
  - When not enough valid licenses are available because the subscription has reached the end of term or there are more servers in the license tier than available licenses.
  - When the 90-day grace period has expired.
  - The servers are added to the account but not registered in the Smart Licensing account.

When an account license status moves to Out of Compliance, a grace period of 90 days is triggered.

Pit stop #9: ENGAGE

Review Intersight analytics with your customers based on their usage and adoption.

What features are they using?

What additional features could they be using to save more time and money?

Partners can recommend additional training or request feedback based on the customer's adoption and usage of Intersight. Partners will then work to define and overcome hurdles, objections and barriers.

Pit stop #10: ADOPT

The key here is to ensure your customer is actively using the solution leading to full adoption.

Within this step, it's essential to make sure the objectives align. Work collectively with your customer to review and ensure they're taking advantage of all Intersight features:

- For example, are they deploying the new HX Data Platform directly through Intersight?

- Reference all features available in the tier that was purchased.

License Settings (accessed from the Settings menu)

- Provides details about the status and number of servers in a particular license tier, compliance status, last updated date, usage and the option to register and deregister.

- A blue tag at the top left of the Features list for each license tier indicates whether the license tier is Active and the green tag at the top right indicates whether that license tier is set as the Default.

- To set a license tier as the default, click the Set as Default button. When a tier is set as Default, any new servers claimed to this account are part of this license tier by default.

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Pit stop #11: OPTIMIZE

Provide your customers with continual updates, ensuring new product features are tested, enabled and adopted.

In this step, you want to help your customer realize unexpected value. Make sure they're taking advantage of new features, which are continuously being added, such as the Intersight mobile app, which lets users not only monitor their systems, but also open a TAC (Technical Assistance Center) case.

Join the Intersight Community to get product updates on new Intersight features and functionalities as they're released. Plus, access training material and get questions answered by Intersight experts.

Never miss an Intersight update by subscribing to Intersight product update emails.

Pit stop #12: RENEW

Begin engaging your customer 90 days before the renewal deadline so you have time to address any objections.

Review the overall account and Cisco Cloud Services Platform (CSP) that was in place.

Review the product usage analytics.

Review the expected outcomes and results.

The Intersight features and functionality your customer uses and depends on for its data center will make the decision to renew an easy one.

Pit stop #13: RECOMMEND

Review the end customer's environment to ensure the entire solution is still in alignment and identify new needs and opportunities to upgrade.

Intersight is based on a four-tier subscription model:

- Base (free)
- Essentials
- Advantage
- Premier

Customers who want the most features and functions can look at their subscription investment and move up the stack across their hardware deployment to gain the most features and functions and integrated solutions as needed. For example, an upsell is a great idea if they want UCS director included.

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Pit stop #14: **ADVOCATE**

Your customer has found complete value out of the solution. They may explore additional offerings as well.

An excellent recommendation would be IWO (Intersight Workload Optimizer), a real-time decision engine that ensures the health of applications across your on-premises and public cloud environments while lowering costs.

It's also crucial to acknowledge that the customer's business needs may have changed to ensure the entire solution is still in alignment.

Pit stop #15: **ACCELERATE**

The opportunity to expand, upsell or cross-sell services can occur at any pit stop, hence why it cuts across the racetrack like a shortcut to the victory line.

Stay engaged throughout the sales process so that you can respond quickly and appropriately to changes in your customer's business.
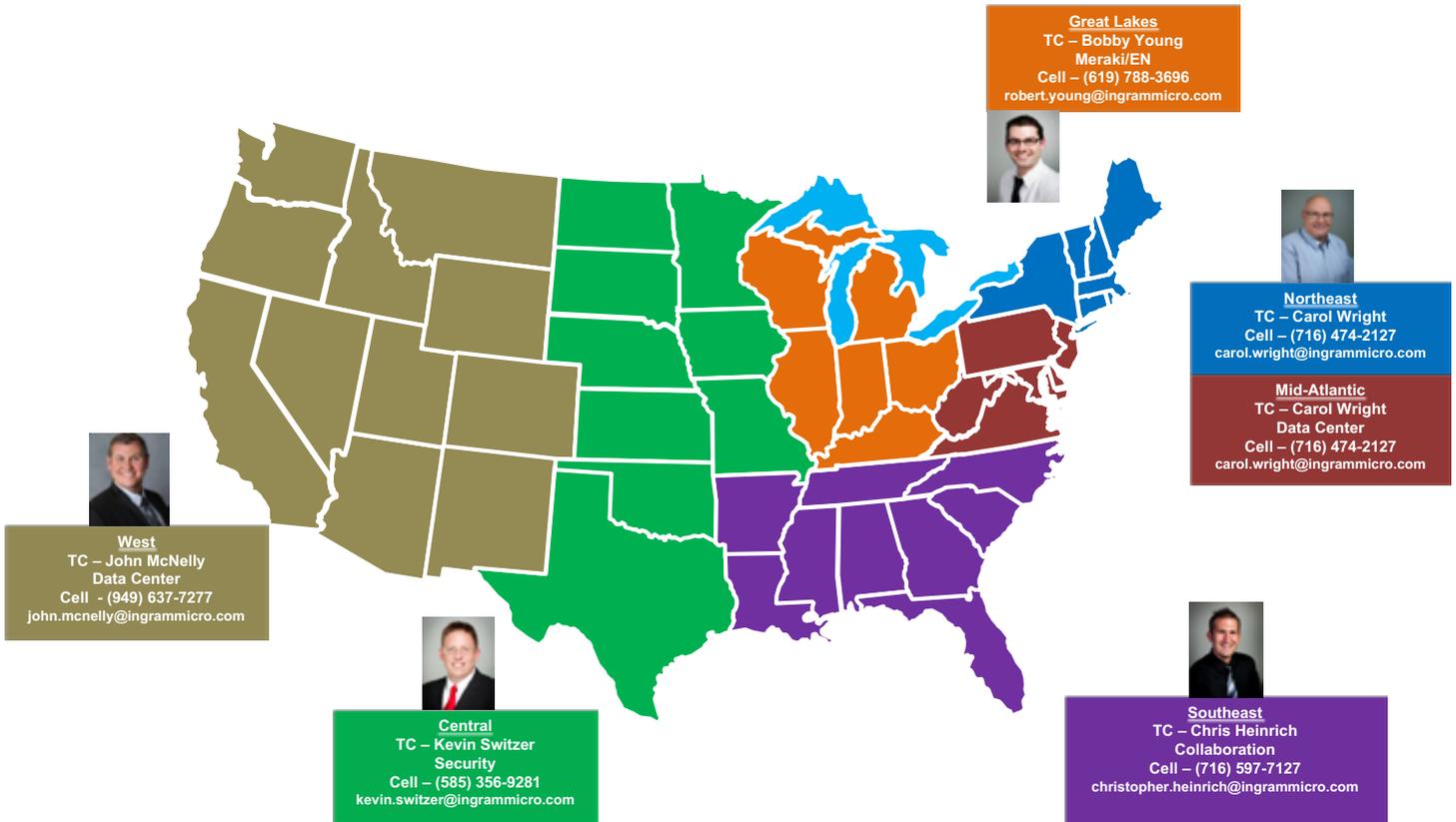
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