

THE RECURRING REVENUE ROADMAP FOR WEBEX CALLING

CALLING.
A LEVEL UP.

WEBEX CALLING: A STEP-BY-STEP GUIDE APPLYING THE CISCO CX METHODOLOGY



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

Pit stop #1: NEED

A calling solution that's simple to manage from anywhere, allows your users to move from the home and office without heavy lifting and comes with the features businesses have come to expect is a must-have these days.

Whether your clients need basic hunt group and voicemail features, or they want to step up their business with an auto attendant and receptionist, Webex Calling solves these needs and others, wrapping them into a flexible, easy-to-use solution.

If you need help figuring out exactly what portions of the Webex Calling offer to position to your customers, the [Ingram Micro Business Transformation Center \(BTC\)](#) is here to help you and your customers or prospects experience technology solutions in real-life environments. Not only does the BTC showcase the latest calling technology from leading vendors, like Cisco, it's also staffed by a design services team that's available to help with demos, answer technical questions and assist your sales efforts.



Pit stop #2: EVALUATE

It's essential to determine which calling and collaboration tools your customer already has in place so you can help them compare their existing offerings to Cisco's Webex solutions. Competitive solutions are researched and compared via the Cisco Competitive War Room (access [here](#)).

Your customers can try various Cisco products, such as Webex Meetings, Webex Teams, Webex Calling and several collaboration devices for up to 90 days so that they can make an accurate comparison. Contact the [Ingram Micro BTC](#) for assistance.

Pit stop #3: SELECT

Fine-tune your customer's Webex Calling selection:

- Choose how many users will require specific core applications, such as the Webex Calling app, Receptionist Client and voicemail, Teams messaging and other complementary solutions and services, such as:
 - [Pro Pack Security, Compliance and Analytics](#)
 - [Team messaging](#)
 - [Video meetings](#)
 - [Calling registration for video devices or common area phones](#)
 - [Analog phone and fax machine connectivity](#)
 - [Local gateways](#)

- Engage the [Ingram Micro Solutions Design and Services team](#) for assistance with presale design, Cisco bill of materials and Ingram Micro quotes.

Haven't received authorization to sell Webex Calling? Ingram Micro's solution sales specialists can help you get authorized.

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 submits the order to Ingram Micro who processes the order with Cisco.
- Experiencing budget objections? Ingram Micro Flexible Payment Solutions (FPS) replaces large capex with an affordable monthly payment. Contact us at financialsolutions@ingrammicro.com or (877) 877-0035.



Pit stop #6: ONBOARD



Now that your end customer has purchased a Cisco Webex Calling solution, education and enablement are essential. At this phase you should create a customer success plan to ensure you align the customer's outcomes and clearly identify KPIs to confirm they're met.

As an Ingram Micro partner, we have several resources you can use to train your customers.

- The [Cisco Virtual Learning portal](#), which includes instructional videos, blogs, checklists, trend articles and other valuable assets to familiarize customers with Webex.
- [Business Transformation Center \(BTC\)](#)
- [Ingram Micro training services](#)

Pit stop #7: IMPLEMENT



After Cisco provisions your customer's Webex licenses, you're ready to implement the technology, which should include:

- A rollout plan
- Detailed best practices and plans for additional integrations that may be required
- Aligning the distribution of Webex licenses to the respective users

Click [here](#) for instructions on configuring Webex Calling.

Don't have available resources? Ingram Micro Professional services have a wide array of offerings (e.g., Ingram Micro Link, training, management tools) that are available to our partners to help ensure a smooth implementation. Visit <https://ingrammicrolink.com/> for more information.

Pit stop #8: USE



Follow up to ensure your customer is using the core features and functions of the software. Work with them to review Webex Control Hub analytics. Track success against the expected outcome using your customer success plan developed in the Onboard pit stop.

- You can manage users, services and devices in [Control Hub](#)
- For smaller issues, you can point users to self-help videos:
 - For Webex Calling, click [here](#)
- If additional instruction is needed, contact the Ingram Micro Technology Consultants team. On-site and virtual training is available. Click [here](#) to see a map showing the Ingram Micro Technology Consultants team member in your region.



Pit stop #9: ENGAGE



When you can show a customer specific stats (e.g., analytics from Webex Control Hub) related to their Webex use, it helps them develop a stronger bond with the collaboration tools. Increasing customer engagement can also come from several other sources, such as:

- Recommending additional training
- Requesting feedback based on actual adoption of Webex technology
- Defining your customer's collaboration hurdles, objections and barriers to determine a proper course of action and implementing a strategy to onboard additional users to the Webex platform

The [Ingram Micro Technology Consultants team](#) can also be an invaluable resource to help with customer engagement.

Pit stop #10: ADOPT



In this step, it's critical to align the objectives. Ensure your customer is actively using the solution, not just turning on equipment or opening an app. Also, work with your customer to review analytics from the Webex Control Hub portal and track success against the expected outcomes defined in the customer success plan (developed in Onboard).

Cisco makes it easy to find adoption trends and utilization. Click [here](#) for more information on how to use the following tools and resources:

- [Calling reports](#)
- [Media quality](#)
- [CSCAN](#) (to check latency, bandwidth and ports)

It's also vital to identify usage gaps or low utilization, so you can quickly address them by:

- Understanding the barriers preventing workers from using it
- Offering live demos or other training and enablement services
- Communicating with management to make them aware and ensure the problem is addressed

At times your customer may overutilize the solution—the best problem to have!

- Monitor this closely so your customer doesn't have any surprises at time of true-up or renewal. Great expansion opportunity here!

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Pit stop #11: OPTIMIZE



- Provide your customers with continual updates, ensuring new product features are tested, enabled and adopted.
- By staying up to date with the products, you'll help your customer realize unexpected value they weren't even looking for with their original purchase. [See what's new in Webex Calling.](#)

- Uncover expansion (i.e., "Accelerate") opportunities (e.g., expand their Webex Calling with video, recording and Contact Center capabilities. Or, expand their Webex Teams with enhanced content sharing services).

Pit stop #12: RENEW



The biggest mistake partners make with subscription renewals is waiting too close to the expiration date to discuss renewing.

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

- Review the overall account to ensure the customer has the correct number of licenses, and to identify any potential competitors you may be running up against, such as Zoom or Microsoft Teams.

Pit stop #13: RECOMMEND



Review the end customer's environment and identify new needs and opportunities to upgrade.

- E.g., based on the customer's growth over the past year, it may be a better fit for an Enterprise Agreement (EA).

An EA can help combine multiple offers into a single contract allowing flexibility for growth:

- Webex Calling and Webex Calling for SP provide an Enterprise license delivering a full-featured robust offer for your customers' knowledge workers. Each EA license includes unified communications (Webex Calling) and mobility (desktop and mobile clients with support for multiple devices).
- Cisco Webex Calling (formerly Cisco Spark Call) includes a cloud-based phone system (and the ability to connect other Cisco call control capabilities and services through Cisco Webex Hybrid Services) and encompasses all the devices to make calls.
- E.g., although the customer didn't initially purchase video, they now want to add it to their conference rooms for better interaction.
 - Find out more about Webex Video [here](#).

In this step, you may also choose to recommend complementary technology solutions such as:

- [Pro Pack Security, Compliance and Analytics](#)
- [Team messaging](#)
- [Video meetings](#)
- [Calling registration for video devices or common area phones](#)
- [Analog phone and fax machine connectivity](#)
- [Local gateways](#)

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Pit stop #14: **ADVOCATE**

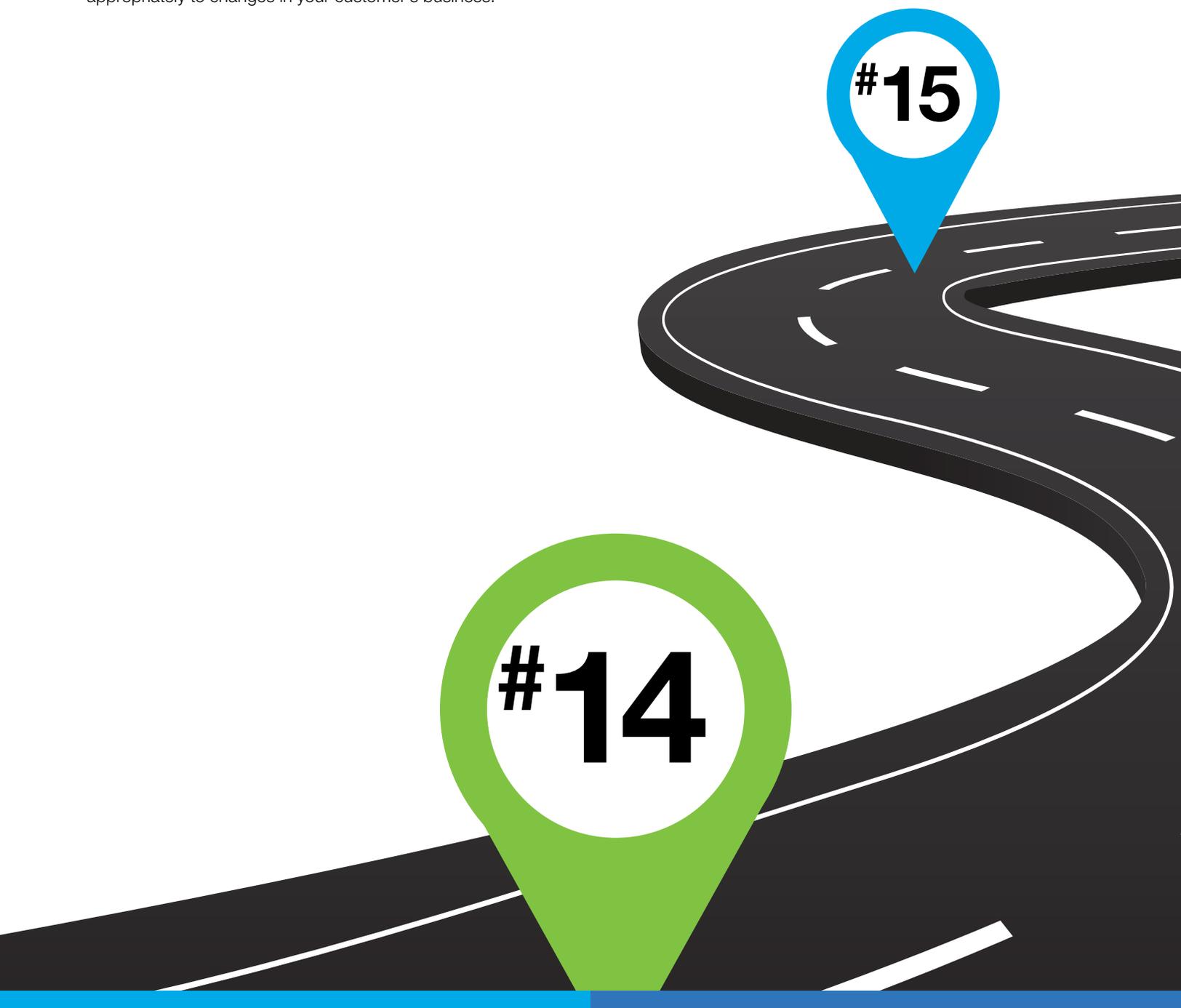
If you've done a good job at the previous pit stops, buying decision-makers in one department will advocate on your behalf to other departments within their organization—and sometimes even to other companies.

This will lead to additional sales of software licensing, telephony solutions (both on-premises and cloud offerings) and hardware (e.g., phones and video devices) as well as a new “racetrack” plan for the new buyer.

Pit stop #15: **ACCELERATE**

The opportunity to expand, upsell or cross-sell Webex products and 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.



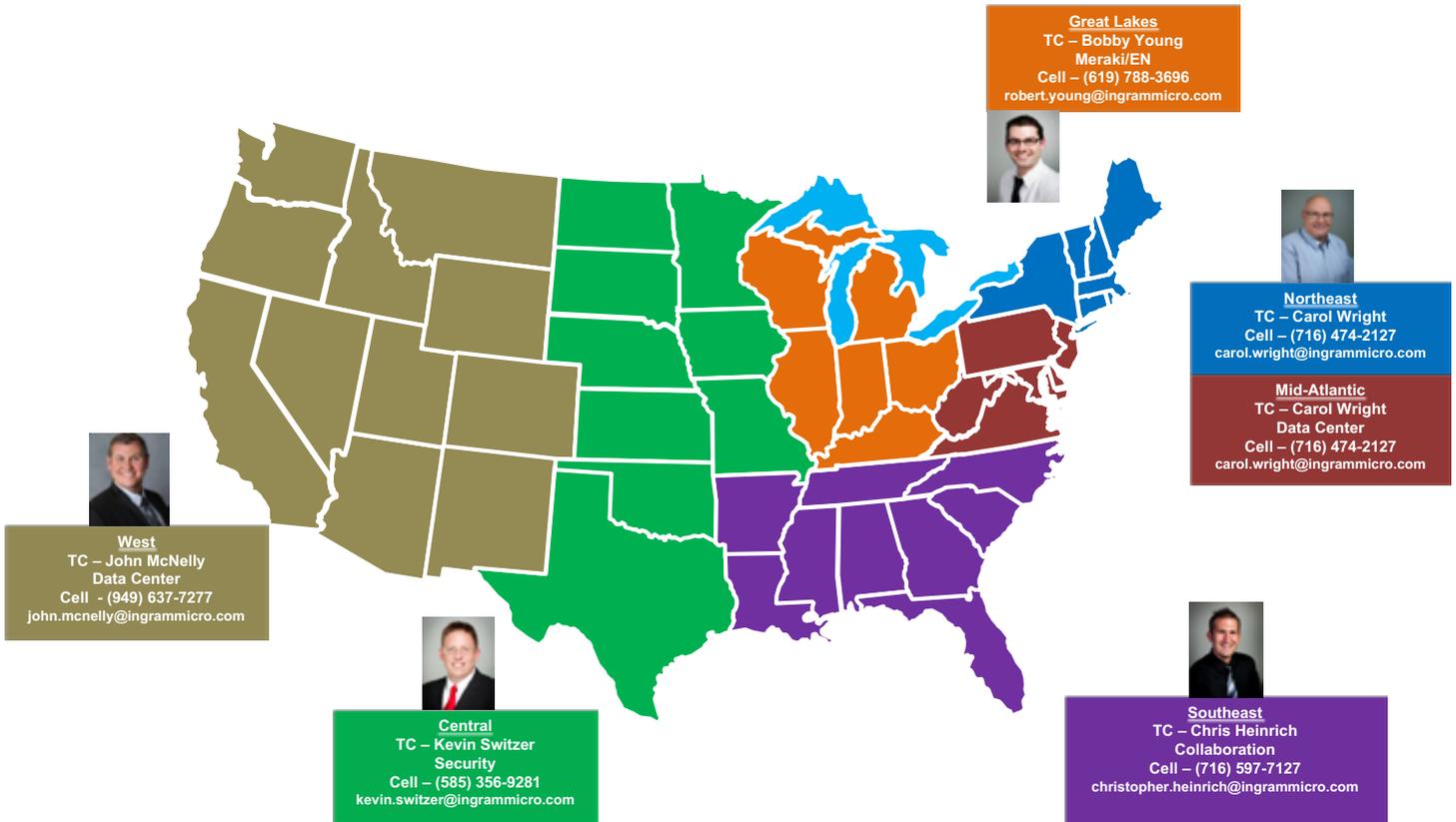
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CONTACT THE CISCO TECHNOLOGY CONSULTANTS TEAM IN YOUR REGION:

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See below to view a map of the regions.



A LEVEL UP.