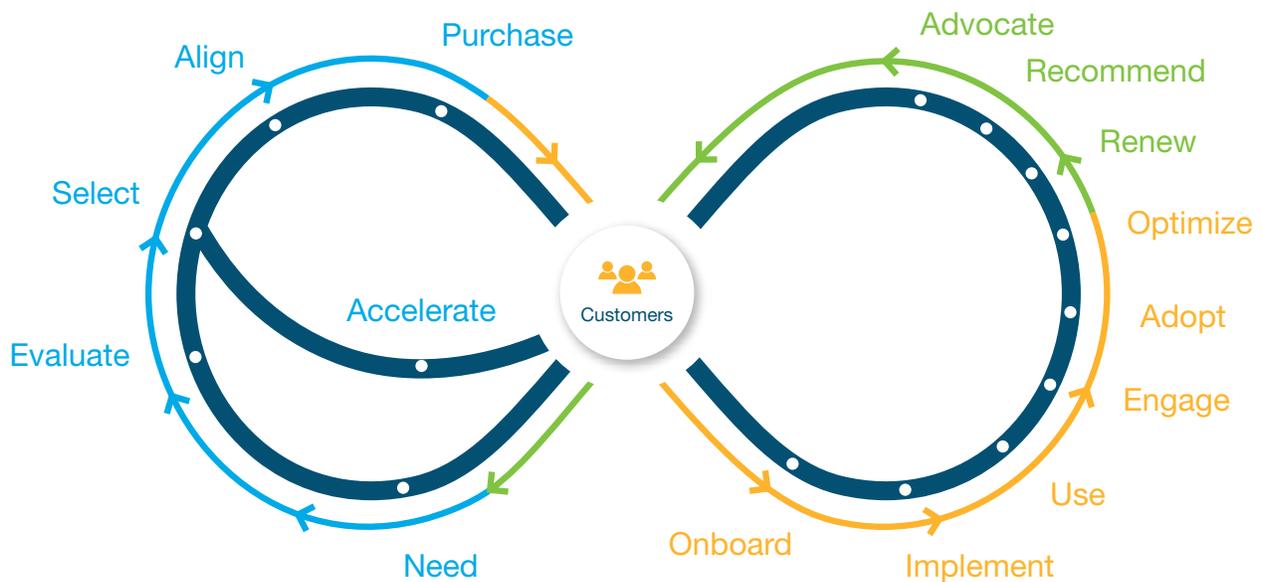


# THE ROADMAP TO RECURRING REVENUE: WEBEX

COLLABORATION.  
A LEVEL UP.



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



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

### Pit stop #1: NEED

As companies get back to work following months of quarantining, several employees will continue to work remotely, which creates a need for videoconferencing and other collaboration tools to stay connected. Additionally, some of your customers may be struggling to serve their clients while having fewer employees in the office. All of these pain points can help establish the need for a Webex solution.

Talk to your customers about business changes and challenges they may be facing.

- Do they have more workers working remotely?
- Have they cut back on travel?
- Are they struggling to serve their clients with fewer employees in the office?

The Ingram Micro [Business Transformation Center \(BTC\)](#) is available to our partners to help you and your customers or prospects experience technology solutions in real-life environments. Not only does the BTC showcase the latest UCC 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 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](#)).

Let your customers try it. They can access 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 selection:

- Choose how many users will require specific core applications, such as Webex Teams and Meetings, as well as other complementary solutions and services, such as:
  - [Webex Audio](#)
  - [Pro Pack Security, Compliance and Analytics](#)
  - [Webex collaboration devices](#) such as conference phones, displays and headsets for conference rooms and workstations
- Engage the [Ingram Micro Solutions Design and Services team](#) for assistance with presale design, Cisco bill of materials and Ingram Micro quotes.

## 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 re-evaluations 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](mailto:financialsolutions@ingrammicro.com) or (877) 877-0035.



## Pit stop #6: ONBOARD



Now that your end customer has made the purchase of Cisco Webex, education and enablement are key. At this phase you should begin your customer success plan to ensure as you deploy the solution and your end customer begins to use it, they achieve the desired outcomes.

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.
- BTC [Business Transformation Center \(BTC\)](#)
- For Webex meetings [click here](#)
- For Webex Teams [click here](#)

## 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

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 without any problems and offer assistance where needed.

- For smaller issues, you can point users to self-help videos:
  - For Webex Meetings [click here](#)
  - For Webex Teams [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 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



Ensure your customer is actively using the solution, not just turning on equipment or opening an app. Work collectively with your customer to review Webex Control Hub analytics. In this step aligning the objectives is key. Track success against the expected outcome utilizing your customer success plan developed in Onboard.

It's critical 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 the time of true up or renewal. Great expansion opportunity here.

## 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 Webex products, you'll help your customer realize unexpected value they weren't even looking for with their original purchase.
- Uncover expansion (i.e., "Accelerate") opportunities (e.g., expand their Webex Meetings with whiteboarding, recording or Webex assistance services). 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 now.
- E.g., although the customer initially purchased a perpetual license, new circumstances may dictate that a cloud license is now a better fit.

You may also choose to recommend complementary technology solutions such as security, routing and switching or data center infrastructure.

## 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.



#13

#14

#12

## 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.

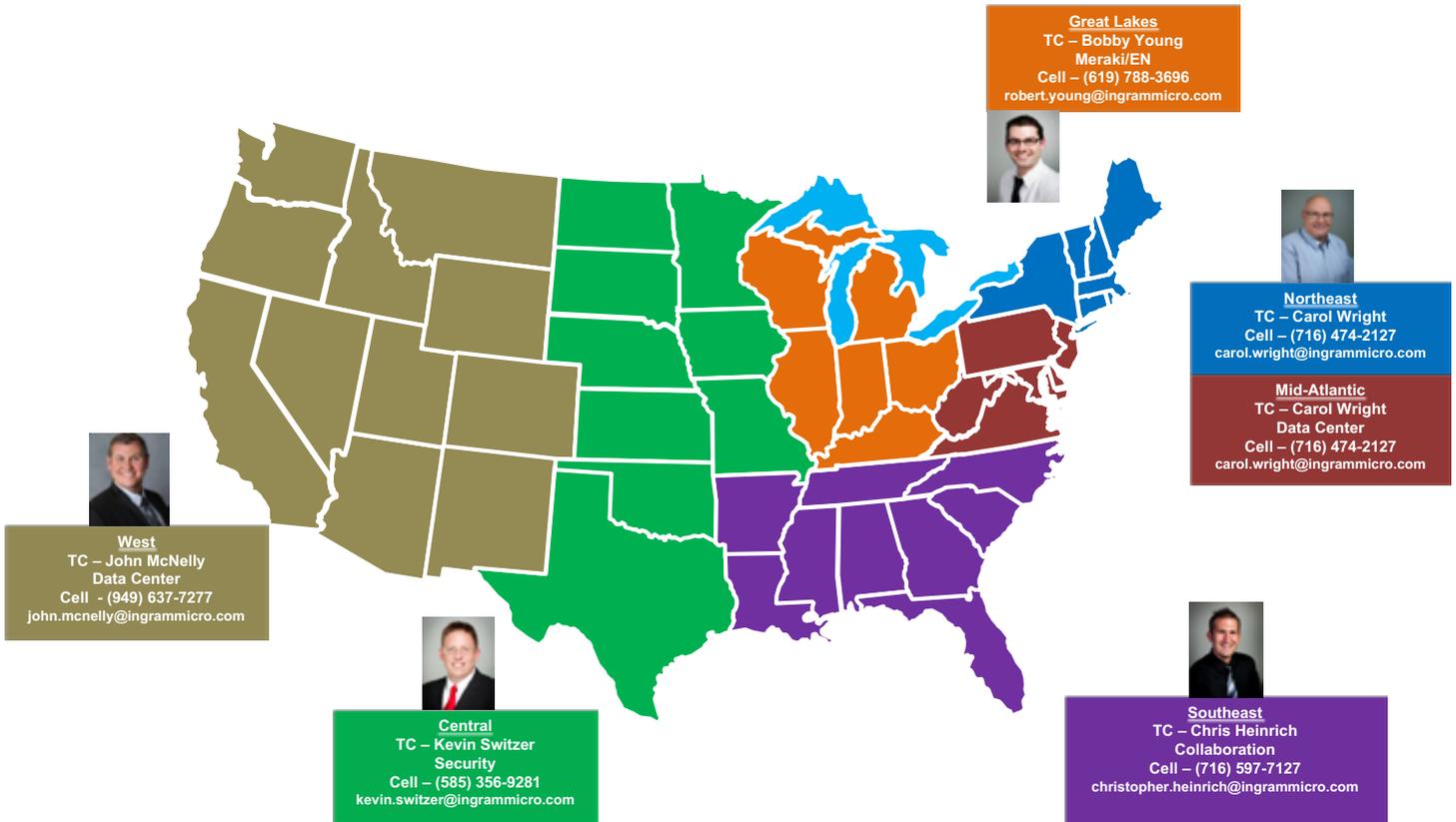


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## CONTACT THE CISCO TECHNOLOGY CONSULTANTS TEAM IN YOUR REGION:

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See below to view a map of the regions.



**A LEVEL UP.**