NETFORMX®

= SyCom

SyCom Technologies Customer Success Program Takes Off

Excellent customer experience is a competitive differentiator, and ongoing relationships are critical to the successful sale of software-as-a-service and recurring offers, as well as value-added service opportunities following the initial purchase.

Cisco rewards Partners for developing customer success practices and creating value across the customer experience lifecycle, from the start through activation, adoption, and expansion. Cisco Partner Sales, Customer Experience, Customer Success, and Renewals teams are evolving their practices to manage the full customer experience process so that it maximizes their Cisco Lifecycle Incentive (LCI) rewards and their customers' experience.

A successful LCI program needs to embrace the entire lifecycle—both presales and post-sales. To satisfy Cisco requirements, the Customer Success teams must identify LCI-eligible opportunities, create Customer Success Plans (CSP) and deliver Successful Business Outcomes (SBO) for each qualified deal, adhere to submission and reporting timelines, and leverage automation to enable scalability.

SyCom builds Customer Success with Netformx tools

SyCom Technologies, a full-service IT integrator, hired Ryan Webb to help build and grow their Customer Success practice. Although they are a Cisco Gold Partner and part of the Customer Experience Specialization that offers Cisco Lifecycle Incentive (LCI) rewards, Customer Success at SyCom covers all technologies sold to their customers, not just Cisco.

Ryan's background is centered around Customer Success. Coming in, he knew little about the Cisco Partner program and processes and nothing about the LCI. Initially, he did extensive research and created manual methods to manage and track their LCI initiatives. At the end of 2020 he was shown the Netformx LifecycleXpert features in Netformx ChannelXpert™ and, later, the Netformx Pipeline Insight Tool (PIT). These innovative applications dramatically transformed his ability to engage with customers and to ensure SyCom Customer Success outcomes during both presale and post-sale phases.

During presales, PIT gives SyCom early visibility into their potential LCI pipeline. This often triggers business planning discussions with those customers. PIT is also used to make sure that appropriate LCI-eligible SKUs are incorporated in deals. Post-sale, SyCom uses ChannelXpert to identify eligible Adopt and Expand opportunities.

Efficiently adapting to Cisco and all its intricacies

"When I started building our Customer Success program I had so much to learn about our customers, partners, and solutions. It was like drinking from a fire hose. Netformx tools helped me to understand Cisco better and do my job more efficiently."

– Ryan Webb, Director of Customer Success, SyCom

Pipeline Insight Tool prioritizes LCI opportunities for presales involvement

The Pipeline Insight Tool enables SyCom to incorporate Customer Success planning into their presales process. Before using PIT, Ryan didn't have a reliable way to identify and prioritize eligible Cisco LCI deals until after they were booked. Since SyCom engages in hundreds of presales conversations every month, it wasn't feasible for the Customer Success team to engage during presales activity.

Now, using PIT, Ryan quickly identifies which deals in the pipeline would benefit from a customer success engagement and would be eligible for LCI, so he can focus on the high priority opportunities. He works with SyCom's engineers and AMs to create Customer Success Plans that focus on their customer's desired

business outcomes and often meets with prospects before the deal is booked. Ryan has set up a scheduled weekly PIT report which automatically comes via e-mail and provides data he couldn't get previously.

Key Pipeline Insight Tool benefits for SyCom

- Engaging customers in conversations about Outcomes early helps win business and can lead to Expand opportunities during presales

- Increased focus on customer business outcomes and success plans during presales ensures a timely plan submission to earn LCI

- Prioritized presales LCI opportunities for in-depth engagement

- Visibility to deals near the LCI eligibility threshold that sometimes can be adjusted to become eligible deals.

PIT transforms customer engagement and enables advance planning

Prior to using PIT, SyCom didn't start work on Cisco's required Customer Success Plans to achieve Successful Business Outcomes until the eligible deal was booked. That made it difficult to gather data and create the plans within the required Cisco program timeline. They lost out on several LCI's last year because of missed submission deadlines.

Early focus on Outcomes closes deals faster

Early LCI insight with PIT is making it much easier to meet Cisco's CSP and SBO deadlines and to be more focused on the customer needs. Ryan began using PIT to prioritize the largest LCI presales opportunities and engaging with the engineers and AMs right from the start. They talk about the customer's business early and ask the customer about desired business outcomes before the deal closes. Ryan is often involved in those customer conversations and discusses what they want to accomplish. Together, they create the CSP to achieve SBO's that can later be used for LCI submission. Creating the plan with the customer early is proving to be a value-add differentiator that the customer doesn't expect and is helping to close deals faster.

Focusing on customer success, not program details

"Netformx provides easy access to data and insights that I couldn't get before. Netformx tools enabled me to focus on the customer and their business outcomes instead of researching deal and program details."

Early plan approval creates an efficient Customer Success process

With access to PIT insights, Customer Success plays an important role right from the start and has substantially increased efficiency. For example, Ryan just worked with an engineer and an account manager to create a success plan for a deal in the pipeline. Even though the deal has not closed, the success plan has been approved. Once closed, he will just submit the plan that's already been created.

Find Expand opportunities before the Deal closes, with a focus on Outcomes

Not only does SyCom now deliver a better solution that targets their customer's needs, but the customer learns that SyCom cares about their business. As solutions and technologies evolve and change (business outcomes don't change as frequently) SyCom can say: "You mentioned you were trying to accomplish X. We've just learned about a new solution that we think can help if you are interested in learning more. Those conversations are creating more opportunities, effectively enabling SyCom to do Expand even before they close the deal.

Having an integrated, continuing conversation across presale and post-sale is helping to bridge all silos and enables SyCom to have a consistent voice throughout the lifecycle.

"The Netformx Pipeline Insight Tool has been awesome. I'll get involved working with the team and the customer to create a success plan around, for example, a collaboration solution. We start talking about the challenge of securely unifying disparate teams across regions with a lean IT team. The next thing you know I'm in a presale's conversation talking about expanding the offering and including DNA Center because it will help them achieve their desired business outcomes. Now the whole team is working together to better understand our Customer's desired outcomes."

Insight to increase LCI reward eligibility

SyCom is also using PIT to identify deals that are close to the LCI eligibility threshold so they can see if there is a way to convert it into an eligible deal. Sometimes the deal just needs to be structured differently to become eligible.

ChannelXpert identifies bookings eligible for Adopt and Expand opportunities

Prior to having ChannelXpert, Ryan would use the monthly reports Cisco sends for the previous month's bookings. He would manually filter the data and use eligible SKU lists to identify the deals that were booked and eligible for LCI. Filtering the data and cross-referencing the Deal IDs with Cisco data to be sure the data was accurate would take hours of effort. Ryan was spending a lot of time just getting the information he needed before he could actually focus on his Customer Success job. Now he has the data in a matter of minutes.

Ryan has been using LifecycleXpert features inside ChannelXpert for the last 4-5 months to see which current closed deals are eligible for Adopt and Expand incentives. He finds closed deals that are eligible, broken down by their subtracks. That tells him which customers are ripe for outreach to create architecture and annuity success plans.

"ChannelXpert literally does automatically what I was doing manually. It gives me back hours of time every month. It is fantastic. I am so happy with ChannelXpert."

Netformx experts to the rescue

Since he hadn't been involved with Cisco processes before, Ryan needed to learn Cisco basics, like what it means when Cisco approves a deal.

"The Netformx tools have helped me make sense of the intricacies of Cisco and their LCI program. All the Netformx staff have been incredibly responsive. The first PIT tutorial not only showed me how to use the tool, but included deal booking benchmarks based on other customers and recommended what we should look at to stay competitive. Their knowledge and insights were fantastic."

Opportunities for additional value

Ryan is looking forward to determining how much growth the Customer Success program generates compared to last year's baseline. He expects to see growth in LCI payouts, deals closed, and revenue captured. That would be a huge win and may justify investing in the Customer Experience Advanced Specialization certification.

Additional PIT and LifecycleXpert features inside ChannelXpert will also enable them to further automate their processes to meet increased scalability demands as their volume of LCI-eligible deals grows.

About Netformx

Netformx cloud-based applications simplify how Cisco Partners and IT Solution Providers can increase profitability from Lifecycle Incentives, VIP rebates, CSPP, and more throughout the sales cycle. We merge our deep expertise of Cisco programs with complete, consolidated, and digestible data from Distributors and numerous Cisco platforms to deliver the right data to the right people at the right time. Business outcomes are further enhanced with timely insights to manage renewals and discover replacement and expansion opportunities.

Netformx users globally leverage our Suite of Applications to offer a better customer experience and help them to be future-ready. This is done through optimized and accurate proposals, ongoing in-depth analysis to efficiently manage the customer lifecycle, and at-a-glance insights into customer network assets, software subscriptions, and support contracts. Netformx customers include AEC, ALE, AT&T, Bell Canada, BT, Cisco, ConvergeOne, Insight, Logicalis, Optus, NTT, SyCom Tech, Telstra, and Veytec.

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