

## Digital Transformation Customer Success Manager Foundation

**Course Code:** DTCSMF

**Duration:** 10 hours (approximated)

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### Overview

This course is intended for people new to the Customer Success Manager (CuSM) role or those who are preparing for the formal Cisco Customer Success Manager certification.

The course assumes no knowledge or expertise. Key concepts of insertion, adoption, expansion, and friction-free renewals are covered, particularly as they relate to service or subscription-based product sales and deployments. This course is not a prerequisite for the Cisco Customer Success Manager certification, but it is highly recommended. There is no formal assessment within the content, but mastery of the concepts is tested via challenges at the end of each module.

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### Pre-Requisites

*Attendees should meet the following prerequisites:*

- None although customer facing experience is useful
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### Objectives

**After you complete this course you will be able to:**

- Understand the concept of customer success in the context of software products or services
  - Be able to identify the key tasks and expectations from the CuSM role
  - Know about the concepts of Critical Success Factors (CSFs), key performance indicators (KPIs) and how they are employed to measure success
  - Be able to define the concepts of stakeholders, business outcomes, Annual Recurring Revenue (ARR), Lifetime Customer Value (LTCV), and how they relate to tracking success
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### Target Audience

This course is intended for individuals who have less than 2 years' experience and are in need of foundational knowledge to ensure that the customer achieves the desired outcomes, realizing the value of their purchased products/services. This is likely to include (but not limited to) the following:

- Customer Success Managers
  - Customer Enablement Managers
  - Customer Adoption Managers
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## Content

### Lesson 1: Course Overview

- Cisco Customer Success Manager Specialist Certification
- Making the Most of This Course
- Hear from an Experienced CuSM (Video)

### Lesson 2: Introduction to Customer Success Management

- Role of the CuSM
- A CuSM Explains Their Role (Video)
- CuSM Skills and Competencies
- Assess Your Own Skills and Competencies
- CuSM Tasks and Activities

### Lesson 3: Discovery

- Purpose and Value of Discovery
- Working with Stakeholders
- Understanding Process Improvement
- A CuSM Explains Their Role in the Discovery Process (Video)
- Skill and Competency Overview: Discovery Stage
- Discovery Process
- Skill: Empathy & Rapport Building
- Skill: Project Management
- Skill: Managing Meetings
- Challenge

### Lesson 4: Benchmarking and Application

- Interpreting & Applying Customer Data
- Patterns, Anomalies, and Trends
- Gaining a Clear Picture of Outcomes and Challenges
- Validation of Finding
- Performing & Interpreting Gap Analyses
- Barriers to Achieving the Desired Outcome/s
- A CuSM Explains How to Work with Customer Data (Video)
- Using Case Studies & Use Cases
- Strategic Awareness
- Listening
- Challenge

### Lesson 5: Analysis and Evaluation

- Understanding Key Performance Indicators (KPIs)
- Selecting and Applying Analytical Techniques
- A CuSM Explains How to Use KPIs (Video)
- Analyzing Consumption and Utilization
- Determining Next Steps
- Working with Subject Matter Experts (SMEs)
- Report Writing
- Challenge

### Lesson 6: Enablement

- Understanding Readiness and Adoption
- Analyzing and Improving Skills
- A CuSM Explains How to Implement an Adoption Plan (Video)
- Creating a Roadmap for Customer Success
- Understanding and Working with Organizational Culture
- Leadership and Influencing Skills
- Challenge

### Lesson 7: Role of the CuSM in Practice

- 10 Laws of Customer Success
- Cisco VALUE Framework
- A CuSM Explains CuSM Best Practice (Video)

### Lesson 8: Case Study Exercises

- Case Study 1: RKP Banking Corporation
- Case Study 2: Springvale Health Department
- Case Study 3: Solvano's Health Score System

### Lesson 9: Summary and Review

- Review of Course Content
- CSMs Provide Hints and Tips for Success (Video)
- Next Steps