

# Digital Transformation Customer Success Manager Specialist

**Course Code:** DTCSMS

**Duration:** 3 Days

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## Overview

The rise of subscription-based products and services has lowered the barrier to entry, and greatly increased the potential capability of the solutions. However, the lowered barrier to entry also makes it easy for customers to switch to a different solution if a product or service fails to deliver the expected value or outcome to the business.

It is therefore increasingly crucial for providers of subscription-based products and services to be able to offer their customers an advocate who can take responsibility to ensure that the adoption, deployment, and ongoing use of a product or service delivers the agreed-upon business outcome and helps customers achieve the value and utility they expect.

Be it assistance with implementation, response to feedback, product or service roadmap alignment, handling escalation of support calls, or guaranteeing that the proper set of features or functions are purchased and employed, the customer service manager, or CuSM, is there to facilitate and drive customer satisfaction. Additionally, the CuSM plays an important role in expanding the provider's footprint, either by cross-selling of new capabilities or by increasing customer adoption, and, in this way, is a valuable revenue creator.

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## Pre-Requisites

*It is recommended but not required, that students have the following knowledge and skills:*

- Previous experience of working with customers to determine, measure, and deliver business outcomes through the implementation of technology
  - Either completed the **Cisco Customer Success Manager Foundations (DTCSMF)** e-learning course or be familiar and comfortable with its content
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## Objectives

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

- Understand and articulate the purpose of the Customer Success Manager (CuSM) role
  - Understand and articulate the value that the CuSM role delivers to the seller organization
  - Understand and articulate the value that the CuSM role delivers to the customer organization
  - Explain the purpose of using a best practice framework such as the Cisco VALUE Framework to determine the tasks that are needed to be fulfilled by a CuSM
  - Be familiar with the core skills and competencies that are needed to fulfill the role of CuSM
  - Understand how to perform the activities that are recommended in each of the five steps within the Cisco VALUE Framework
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## Target Audience

Any person who has responsibility for customer engagement specifically to ensure the customer maximises value from a product or service to ensure customer retention and growth. 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

### Module 1: Customer Engagement

#### Lesson 1: Overview of the CuSM Role

- Purpose, Value, and Core Activities for the CuSM Role
- How Should Customer Success (and CuSMs) Be Measured?
- Overview of the Cisco CuSM Value Framework
- Skills and Competencies for the CuSM Role

#### Lesson 2: Engaging with and Understanding the Customer

- Cisco CuSM VALUE Framework: Validate Phase Key Outputs
- Researching and Understanding the Customer
- Exercise – Researching the Customer's Business
- Review: Engaging with and Understanding the Customer

#### Lesson 3: Developing Customer Success

- Cisco CuSM VALUE Framework: Awareness Phase Key Outputs
- Discovery Process
- Exercise: Planning for Discovery
- Review: Developing Customer Success

### Module 2: Enabling Success

#### Lesson 1: Enabling and Influencing Customer Success

- Cisco CuSM VALUE Framework: Learnings Phase Key Outputs
- Personas and Learning Plans
- The Adoption Process
- Driving Adoption
- Exercise: Creating an Adoption Plan
- Review: Enabling and Influencing Customer Success

#### Lesson 2: Driving Utilization and Value

- Cisco CuSM VALUE Framework: Utilization Phase Key Outputs
- Understanding Health Scores
- Using a Health Score
- Exercise: Planning CuSM Activity

#### Lesson 3: Monitoring Ongoing Customer Health

- Cisco CuSM VALUE Framework: Embed Phase Key Outputs
- Understanding Processes
- Generating Additional Value
- Exercise: Creating More Customer Value

#### Lesson 4: Role Play Exercise

- Exercise: Role Play an Initial Meeting

#### Lesson 5: Summary and Review

- What This Course Covered
- Recommended Next Steps

#### Appendix 1: Case Studies

- Case Study Exercise 1: Planning for Customer Discovery
- Case Study Exercise 2: Creating an Adoption Plan
- Case Study Exercise 3: Planning CSM Activity
- Case Study Exercise 4: Creating Additional Customer Value
- Case Study Exercise 5: Role Play an Initial Meeting

#### Appendix 2: Cisco Value Framework

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