

## Customer Experience Specialization Customer Reference Template

**What is a Customer Reference:** The reference case is a description of how you engaged with the customer stakeholders using your Customer Success practice methodology in order to achieve specific Business Outcomes that you had agreed with the customer at the pre-sales stage.

Such reference case as a minimum should include the below elements:

### Partner Contact Information:

Partner Name	You company name
Customer Success Practice Lead or Customer Success Manager	Name of your Customer Success Practice Leader or Customer Success Manager engaged on this customer's opportunity
Phone Number	CS Practice Leader or CSM contact
Email Address	CS Practice Leader or CSM email

### Customer Contact Information:

Customer Name	Customer company name
Customer Contact	Contact of the customer individual who was engaged on this opportunity throughout the Land and Adopt stage of the Lifecycle journey
Cisco Sales Order or Customer Purchase Order	Here you place the Cisco SO Number of the customer referenced opportunity

### Overview of Business Problem:

Describe the Business problem or problems you tried to solve utilizing the specific technology sold to the customer.

The technology could resolve technical problems as well but you mainly need to describe how you helped the customer to solve Business issues and pain points that helped the business improve.

### Desired Business Outcomes:

Through your discussion with the customer, you need to describe the Business Outcomes you agreed to deliver upon and help the customer achieve.

Business Outcomes serve the journey on a specific Use case you need to engage for a specific persona. You can have multiple business outcomes that serve a specific Persona/Character on the specific Use Case and multiple Use cases you can include in the reference. Business outcomes include strategic priorities that you identify and describe per business outcome.

Tips:

- Identify Business outcomes with the Customer's project team
- Validate the Business Outcome with the line of Business stakeholders
- Provide paragraph as an 'Executive Summary'

Top Industry Business outcomes examples are:

- Cost Efficiency (you can have one or more priorities per outcome in order to achieve it)
- Business growth
- Security (Credibility and Reputation)
- Environmental Sustainability
- Risk Management
- Time to Market
- Happy Employees

Why the customer bought the solution , what they try to achieve with the solution.

**Solution(s) Sold:**

Describe the main components of the solution sold in high-level description

**Key Performance Indicators (KPIs):**

List the KPIs that helped you measure and track progress and helped achieved the desired Business outcomes.  
Any KPI can be used in one or more Priorities & Business Outcomes, if it is relevant.  
Mention the starting Baseline and the final target result for each KPI (if applicable).

**KPIs should include some or all elements of the “SMART” criteria:**

- Specific: a specific purpose and expectation(s) to meet the desired outcome
- Measurable: specific measurements used to ensure that the desired outcome/s are met
- Attainable: the desired outcome is realistically attainable
- Relevant: must be relevant to the success of meeting the desired outcome
- Time-bound: the timeframe for completing the desired outcome

**Example**

Business Outcome	Strategic priority /Initiative	KPI Description	Baseline Metric	How	When	Who
Cost Efficiency (OpEx. By 2%)	Reduce Travel Budget by 20% within 12 months	Travel costs per Quarter	2016 \$86k/year Spend	Financial reports by Organization	Monthly	XXXX

**Adoption Plan:**

Describe what is the focus for adoption in that specific solution/technology besides the implementation and having the solution work/operate at basic level. (possible Executive summary of how the solution will enable the Business outcome)

Here you need to describe the steps and the activities that you performed in order to execute and achieve your business outcomes. Please note that implementation or installation of the solution is not part of the adoption plan. Adoption starts after the solution is operational.

Adoption is defined as activities that is done to promote and drive the usage of the solution. Below are possible adoption activities.

- Training (Technical / End-user) activities as part of knowledge transfer.
- Stakeholder engagement, PoC deployment for testing, pilots, marketing and, discovery sessions to understand and document barriers and customer needs.
- Appointing and working with “Change Champion”, creating awareness among the end-user via email campaign and poster.
- third party solutions that you had to integrate and align inside the customer premises such as “Cisco Accelerator/ATX”.
- Use case workshop that documented the Use case needs , how you achieved increase in functionality and feature usage etc.

In reality here you describe all the steps that describe your Customer Success Plan execution with the customer.

**Business Outcomes Achieved:**

Mention here all the Business Outcomes achieved out of the list that you mentioned above with an Executive Summary of the journey and how the business benefits from these.

**You can mention the outcomes achieved via statement such as:**

- Travel reduced by 60% due to the implementation of the virtual meeting from WebEx
- User satisfaction with the new wireless solution that provide seamless authentication
- Reduced troubleshooting time and projected operational savings through the use of DNA solution
- Strengthen Network Visibility and security by introducing Stealthwatch

You can also use a table to show the relevance between achieved business outcomes, Initiatives and what that meant for the Business. Make sure there is alignment between Business Outcomes , Initiatives and KPIs and Business Benefits

**Example**

Business Outcome	Business Initiative & KPIs	Executive Statement of Outcome Achieved
Cost Efficiency (Opex. By 2%)	Reduce Travel budget by 20%	Express how the business experiences the value, the benefit to the organization and changes in working processes and culture
xxx	xxx	xxx
xxx	xxxx	xxx

**Additional Elements:**

The above minimum requirements should not limit the information you can mention in your reference.

You could add important information that will support your reference like:

- Change Management Process tasks
- Policy & Governance changes
- Expand Opportunities that resulted from applying your practice
- Stakeholder management activities
- Communication and training activities that helped you increase the usage of the solution sold
- Hand off tasks performed because of adoption barrier identification and how you resolved them
- Customer testimonial and feedback
- Etc.

**The most important part of the customer reference is the adoption plan and activities that is being carry out to drive the usage/consumption of the solution, which resulted in the achievement of the intended outcomes.**