Webex Customer Success Guide

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by CISCO

Here's where your journey begins

Every successful journey begins with a clear path forward.

From the route you take to the equipment you pack; you need to know where you're going and how you're going to get there.

At Webex, we don't believe in reinventing the wheel, and given the demands on your time, we're betting you don't either.

This resource is designed to provide a clear, yet flexible framework to successfully guide your journey every step of the way. Think of it as your go-to manual for tips, tricks, and thought starters on how to maximize your Webex experience.

Welcome to a journey with endless destinations

When it comes to the adoption journey, some believe success simply equates to your employees logging on, hosting a meeting, and signing off. Adoption complete.

At Webex, we'd argue that's just the beginning.

Webex was designed to deliver endless destinations. Maybe that's better healthcare by connecting patients and doctors, better infrastructure through supporting agile work styles for fast-paced engineering teams, or even better company culture by helping HR managers empower a globally distributed and diverse workplace.

Wherever you seek to go, we're here to help–from onboarding to optimization and everywhere in between.

So, think of this adoption guidebook as an initial roadmap, with tips and milestones to illuminate your path.
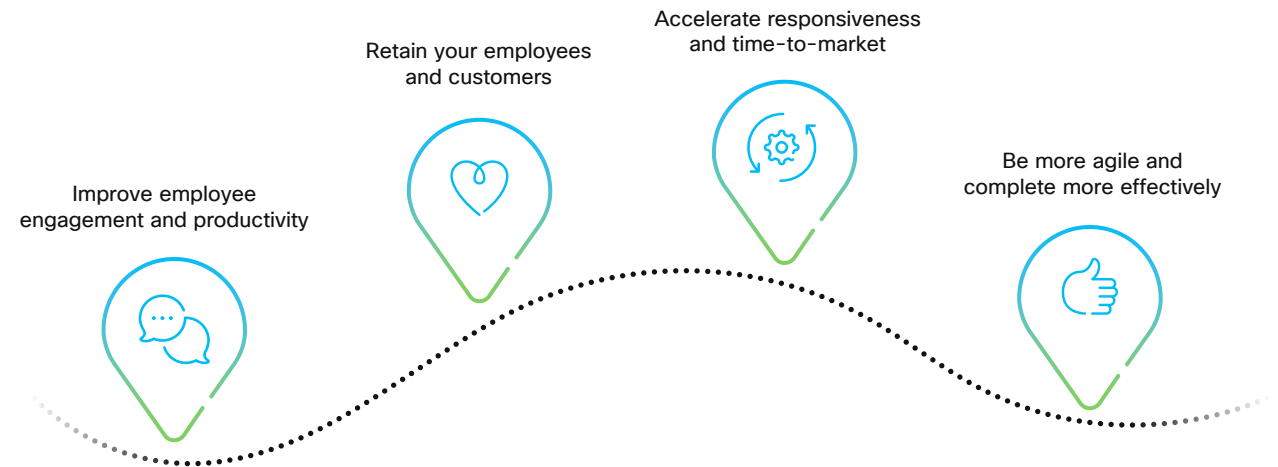
First, let's pick our destination

Just as you'd start a road trip by inputting your desired destination into your GPS, clarifying your business goals and outcomes is the first (and most critical) step in your Webex adoption.

That means deciding your ultimate goal. How will you know when you've achieved it? And what milestones will you need to hit along the way?

Wherever you seek to go, we can help you get there.

Retain your employees and customers

Accelerate responsiveness and time-to-market

Improve employee engagement and productivity

Be more agile and complete more effectively

Business outcomes to move your organization forward

When choosing a destination, the hardest part can be understanding what's even possible. Webex is purpose-built for collaboration, with numerous use cases to support your key business outcomes.

Enable hybrid work for your organization

To achieve this for your organization, your use cases might be:

- Allow for flexibility of work through immersive, high-quality meetings and always-on messaging with people inside and outside your company, no matter where your workers are.

- Join meetings easily from Webex Devices or the Webex App, in the office or on the go.

- Organize professional virtual events on a platform that delivers the scale, reach, and interactivity you expect.

- Provide employees secure collaboration by design for a new hybrid workplace.

Optimize communication and collaboration

To achieve this for your organization, your use cases might be:

- Power seamless and engaging collaboration with secure filesharing and messaging.

- Improve your efficiency and get things done faster with intelligent integrations.

- Enable engaging employee experiences with customer meeting layouts, immersive sharing, and turning on Slido polling.

- Scale your global workflows with real-time translation in Webex.

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01
Our approach to your adoption

Think of us as your personal, go-to guide

We understand the endless demands on your time and that every investment you make matters. That's why we are focused on guiding you every step of the way.
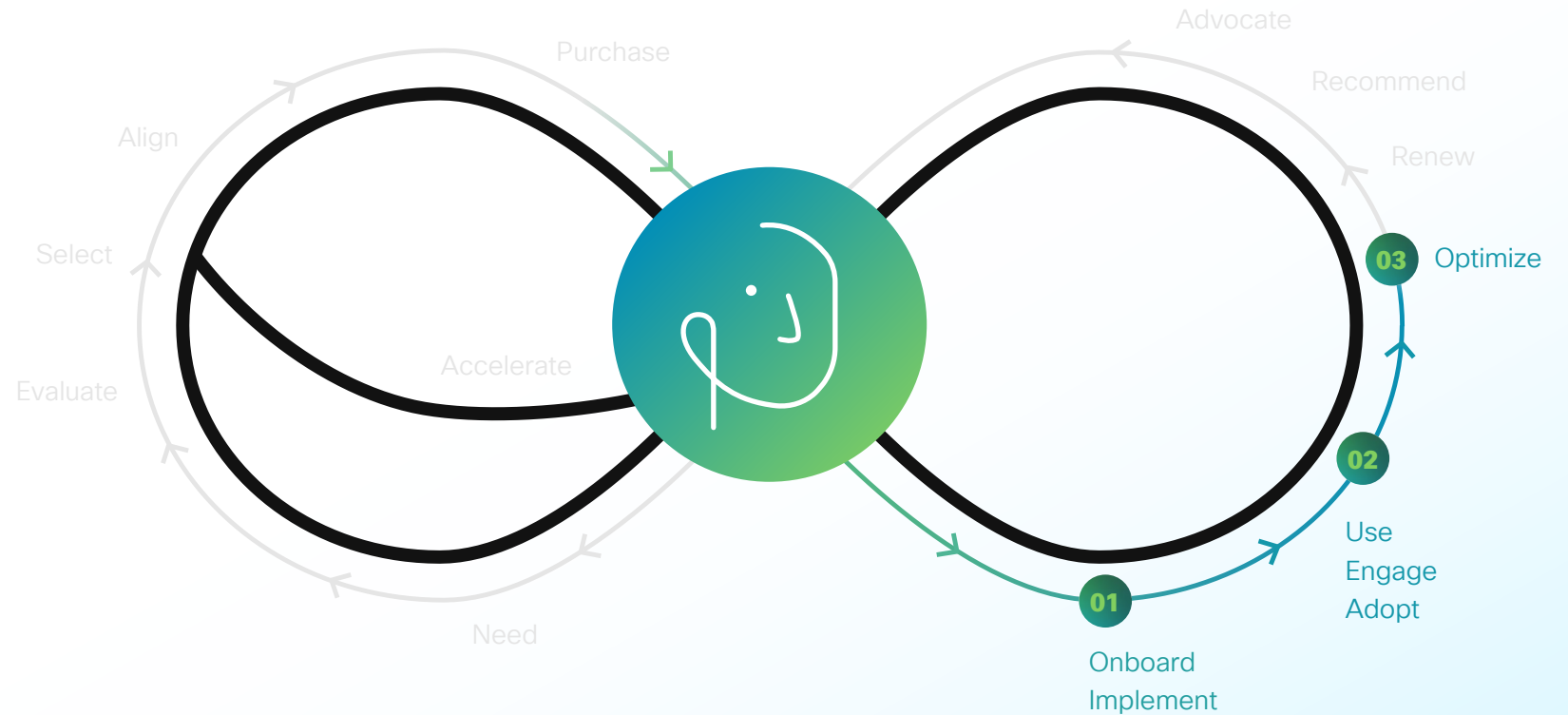
We've built our proven methodology on years of experience working with customers of all shapes and sizes. We believe in inclusive collaboration and want to support your teams to achieve this.

At the end of the day, we're here to help you realize the full power of Webex to adapt new ways of working and achieve new levels of success.

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Here, at every point in the lifecycle

Let's take a look at the journey ahead. We'll make some quick pit stops along the way to ensure you harness the full power and possibility of your Webex investment.

Purchase

Advocate

Recommend

Align

Renew

Select

03 Optimize

Evaluate

Accelerate

02 Use
Engage
Adopt

01 Onboard
Implement

Need

Your adoption journey, at a glance

01

Plan
Onboard and implement

This first stage of adoption will introduce you to your Webex Customer Success team. Together, we'll explore how we can best plan for your success, define your business outcomes, and deploy and implement your Webex experience.

02

Launch
Use, engage, and adopt

Get ready for a new way to collaborate. Once implementation is complete, you're ready to begin onboarding users. We'll help you navigate everything from identifying early adopters and hosting events to leveraging key business metrics.

03

Grow
Optimize and champion

Our third stage of adoption is where the refinement happens. From new features and upgrades to realizing new capabilities, we'll help you maximize your Webex investment.

Focus on the things that matter

Some people welcome the adventure of a journey. But others prefer to stay right where they are (usually in their comfort zone). Organizational change is similar. Some welcome change. Others prefer the comfort and predictability of what they already know.

When it comes to your Webex adoption journey, we've found that buy-in is achieved most frequently through focusing on the things that matter most.
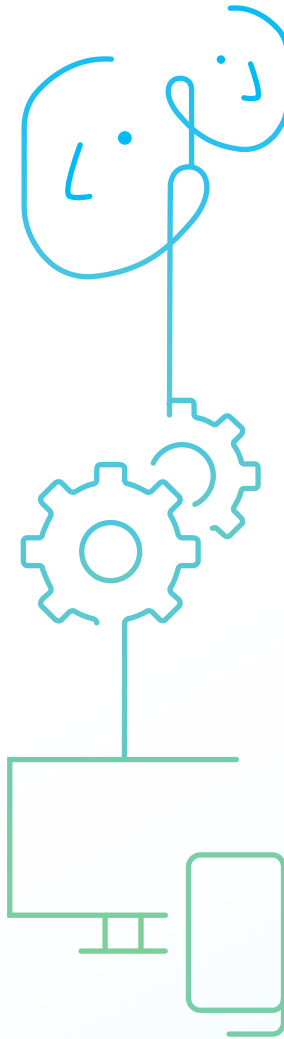
Your people

Establishing an adoption team along the way with the core responsibilities necessary to lead the way

Your process

Defining and communicating clear processes across the organization helps create efficiencies and remove barriers to increase user adoption

Your platform

Having the right tools and technology in place to support your process and your people

Customer success is always a click away

Our templates, tools, and guides are available for download as self-serve resources.

- Help and Support
- Webex Community
- Become a Webex Ambassador
- Join the Beta Program
- Webex Essentials
- Webex GoLearn

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Establishing your adoption team

In addition to the many Webex support resources available to help guide your path, it's essential you also determine who will support the People, Process, and Platform aspects of your adoption journey from within your organization.

That means identifying and establishing up front the key adoption functions. Depending on your organization's size and resources, these responsibilities may sit with more than one person.

Key adoption functions for your team include:

Executive sponsorship

Having executive buy-in for top-down adoption

Communications

Using communications and company events to create buzz

Adoption management

Identifying visible leader(s) who can oversee internal change management and updates

Training

Providing training to help employees start quickly and get the most out of Webex

Technical and service administration

Ensuring you have the right internal contacts and service management to support adoption from day one

A few other things to consider

In addition to establishing your key adoption functions, there are a few other considerations to keep in mind as you forge ahead. These include...

01   Ways you will track success metrics

02   Corporate branding for customizing your application

03   Updating internal policies for new methods of communication and collaboration (i.e., message retention policies and codes of conduct)

04   Creating a go-to place for information and Webex updates on your intranet

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Purpose-built for hybrid work

The Webex Suite is designed to work the ways that you do. It's comprehensive enough to address the collaboration needs of every type of business.

Calling

Messaging

Meetings

Polling

Events and webinars

Whiteboarding

Asynchronous video

Contact Center

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Together, we can accelerate your success

Whether you're a small-to-medium business looking to better engage clients or a global organization shifting to hybrid work, Webex works. Perhaps you're deploying Webex App, Webex Suite, or devices for the first time.

Or you're focused on driving adoption of new capabilities and features. We can guide you based on your organization's unique goals, IT preferences, and collaboration needs.

There are several approaches you can use for your rollout to ensure your organization accelerate success in the way that works for you.

01   Rapid onboarding of your entire organization at once

02   Phased rollout by lines of business or departments

03   Onboard early adopters and then gather feedback before a full or phased adoption

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Our proven approach to adoption can also be applied anytime you deploy new capabilities and use cases.

02
Navigating your adoption journey

Plan

Overview

Launch

Grow

Onboard and implement

The first stage in the adoption journey is to ensure you, as the Webex customer, have everything you need to successfully onboard your new Webex solutions. But don't worry. When the time comes, we'll also make sure the end users within your organization have everything they need as well.

For now, we're focused on establishing Webex within your organization. Let's start by defining business outcomes and planning your successful deployment.

It's critical in this early stage that we plan effectively for implementation—particularly integrating Webex within your existing technical ecosystem.

Plan

Launch

Grow

Onboard and implement

People

Adoption Lead

- ○ Identify your decision makers
- ○ Secure executive sponsorship and leadership buy–in
- ○ Assemble adoption team

Technical Lead

- ○ Make sure app works every time with proper setup and configuration
- ○ Complete "Getting Started" module of Webex Control Hub Professional–IT Admin Learning Plan
- ○ Join Webex Admin Community

Change Managers

- ○ Prepare to execute communication strategy
- ○ Complete Webex Adoption Learning Plan and earn credential

Process

- ○ Identify business processes that will be impacted by adoption of Webex
- ○ Define business outcomes, your personas and their use cases, and success criteria
- ○ Create your rollout roadmap for implementation
- ○ Create and execute organization communications plan
- ○ Create and execute user education plan

Platform

- ○ Engage in account provisioning
- ○ Ensure technical readiness
- ○ Prepare internal help desk/support team
- ○ Prepare launch timeline
- ○ Enable application
- ○ Create user accounts
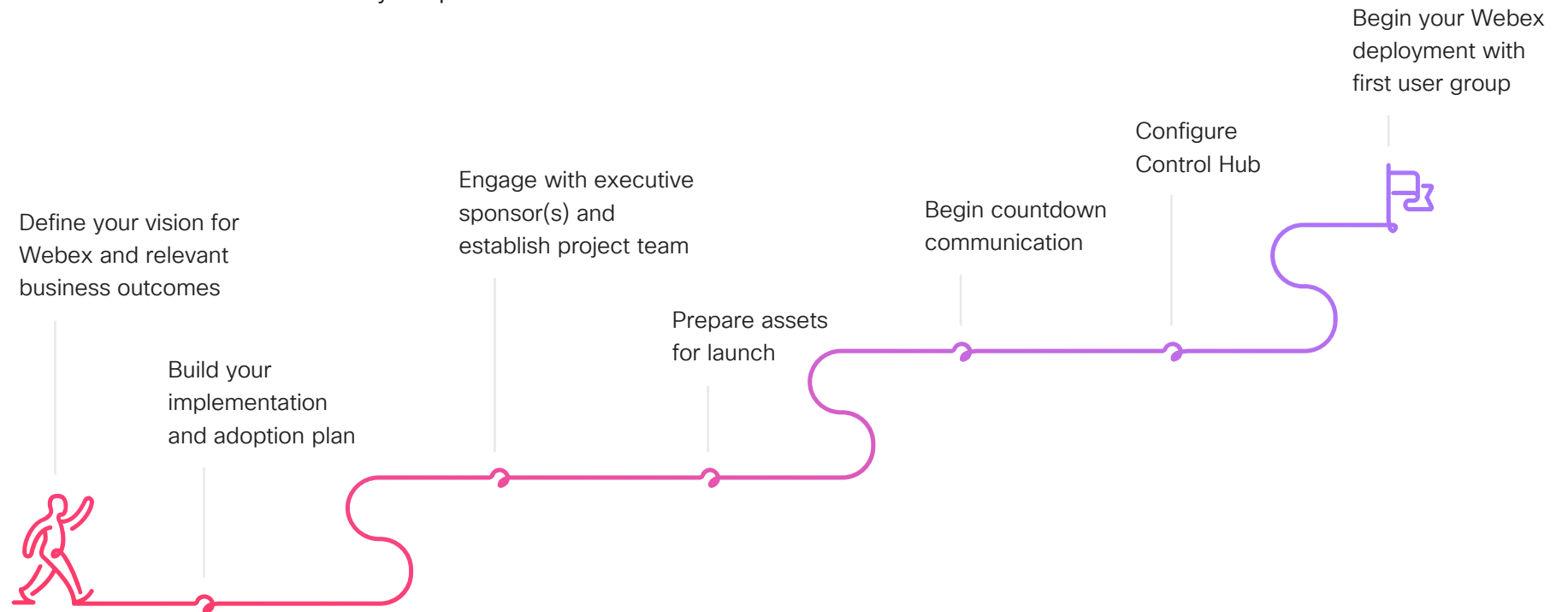
Download resources for adoption planning
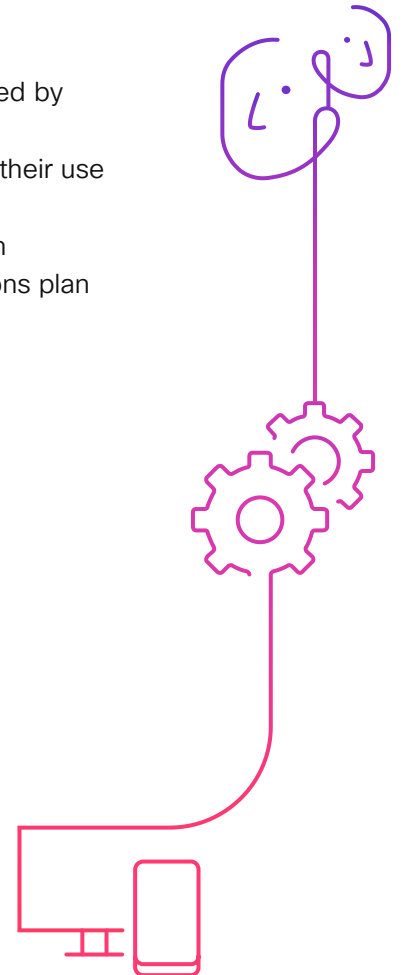
Plan

Launch

Grow

Onboard and implement

Think of these milestones as guidance, not mandates. We recognize every organization is different. However, we also believe there are common steps along the way that can help your onboarding and implementation. Just choose the milestones most relevant for your plan and business outcomes.

Begin your Webex deployment with first user group

Configure Control Hub

Begin countdown communication

Engage with executive sponsor(s) and establish project team

Define your vision for Webex and relevant business outcomes

Prepare assets for launch

Build your implementation and adoption plan

Use, engage, and adopt

Now that you've completed implementation, it's time to get your users on board. From setting up their accounts, to having their first "ah-ha!" moment, to making Webex a part of their day to day, we'll make sure you have everything to empower your users.

Use

At the beginning of your Launch stage, the focus is on diving in, getting familiar, and realizing the true value and power of Webex in collaborating.

Use

People

Adoption Lead

◯ Identify early adopters throughout organization with potential to become adoption champions

◯ Understand and communicate use cases to your organization

Technical Lead

◯ Leverage usage reports and business performance metrics

Change Managers

◯ Complete Webex Adoption Learning Plan and earn credential

Executive Sponsor

◯ Serve as "face" of the rollout to the organization

◯ Understand opportunities to optimize and remove blocks for core team

Process

◯ Continue execution of organization plan

◯ Continue user education on best practices

◯ Host first adoption event as part of plans

◯ Capture success stories and business outcomes

◯ Build user awareness of Webex User Community

Platform

◯ Leverage usage reports and business performance metrics to share early success

◯ Capture opportunities to optimize configuration

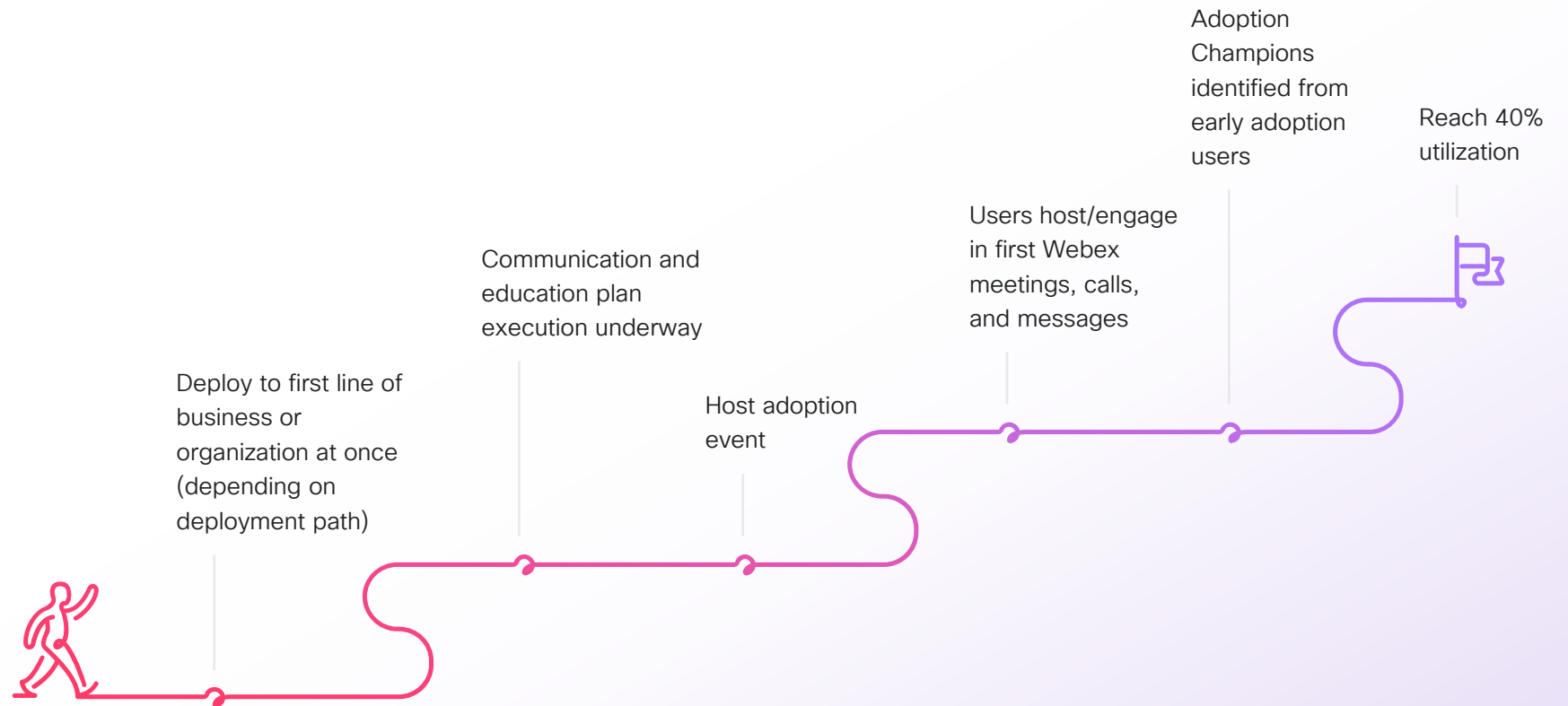◯ Review internal support tickets

Download resources for launch

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Use

Think of these milestones as guidance, not mandates, along your journey.
Choose the milestones relevant for your plan and business outcomes.

Adoption
Champions
identified from
early adoption
users

Reach 40%
utilization

Users host/engage
in first Webex
meetings, calls,
and messages

Communication and
education plan
execution underway

Deploy to first line of
business or
organization at once
(depending on
deployment path)

Host adoption
event

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Level up your users

Looking for ways to better support your users through the early stages of adoption?
Here are a few ideas for you to include in your communications planning.

Gamification

Consider including games to help users engage with Webex products and features in fun ways. Plus, they can see firsthand how easy Webex is to use in their everyday lives. We've designed several games you could incorporate. The key is to include meaningful prizes, such as:

• A half-day off work
• Winning team gets free lunch
• Gift cards from favorite vendors
• Recognition at all-hands meeting
• Writing a guest post on your blog
• Promotional material and swag
• Parties or gatherings

Gamifying Webex adoption

Ongoing adoption communication and events

Creating adoption events also provide milestone moments to drive communication efforts and engage teams in the journey.

Communication ideas to consider include:
• Initial Webex App announcement to org
• Internal newsletter blurbs
• Announcements posted
• Deploy digital signage on Webex Devices and other screens
• Webex Tech Talk sessions
• Post intranet materials (Webex App homepage and Webex learning page)
• Video from Executive Sponsor

Creating successful adoption events

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Your Webex Customer Success Manager is a great resource for ideas and insights on ways to level up your user engagement—starting from day one.

Engage

This portion of your Launch stage is focused on creating deeper connections to Webex, especially as users increase their comfort and capabilities in using Webex regularly. This phase of adoption includes dialing up excitement around the value of new and advanced features.

Engage

People

Adoption Lead

○ Explore additional use cases or user groups and quantify potential within the organization

Technical Lead

○ Understand best practices to achieve intended value

Change Managers

○ Review continued adoption plan with adoption champion network

### Executive Sponsor

○ Provide support around key customer needs

Process

○ Continue execution of organization plan
○ Continue user education on best practices
○ Continue adoption event
○ Capture success stories
○ Survey end users on their Webex experience
○ Activate relevant adoption accelerators where needed
○ Build organizational awareness of Webex Ambassadors program and pathways to join
○ Ask users to complete "Getting Started" module of Webex User Learning Plan

Platform

○ Leverage support tickets/cases
○ Address environment-specific issues to stay on track to meet adoption targets
○ Initiate initial discovery on Webex platform integrations (API)

Download resources for launch
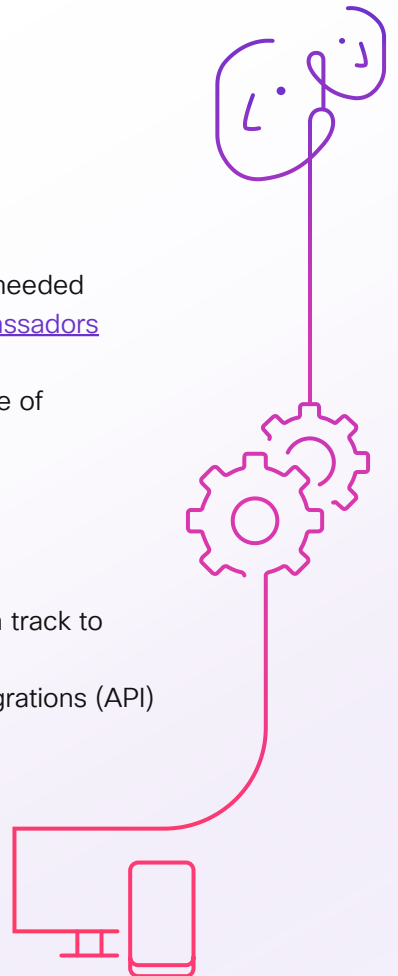
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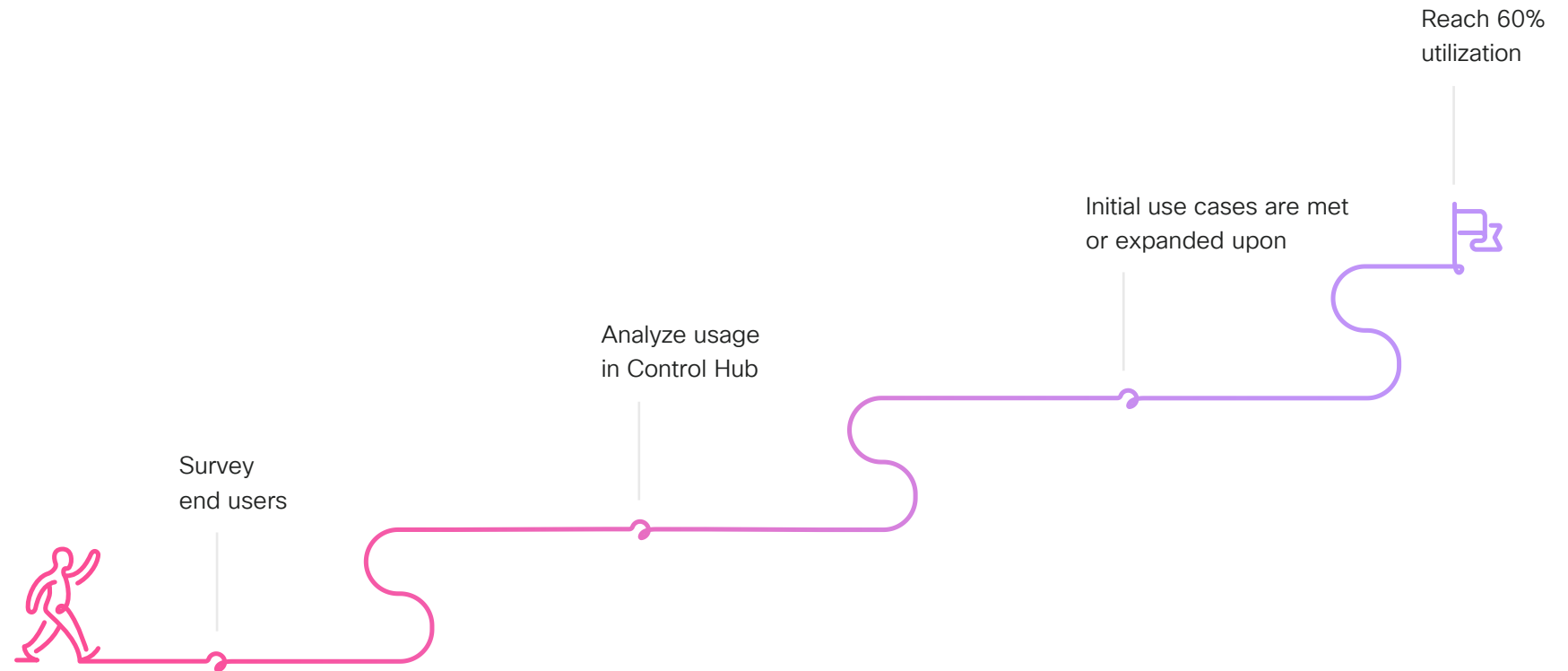
Engage

Think of these milestones as guidance, not mandates, along your journey.
Choose the milestones relevant for your plan and business outcomes.

Reach 60%
utilization

Initial use cases are met
or expanded upon

Analyze usage
in Control Hub

Survey
end users

Adopt

Success! Your users are now in the habit of using Webex. They feel comfortable exploring deeper features and are realizing new efficiencies in their collaboration across the organization and with clients. In our final phase of your Launch stage, your users are ready to level up once more by looking to add and expand their use cases.

Adopt

People

Adoption Lead

○ Continued engagement with key decision makers and stakeholders

Technical Lead

○ Complete Webex Ambassadors – Power User Learning Plan

Change Managers

○ Complete Webex Ambassadors – Power User Learning Plan

○ Execute targeted campaigns (gamification and other events) for inactive users, slow adopters, and other groups facing blocks

Executive Sponsor

○ Support opportunities for value acceleration and address areas of organization that are late adopters

Champions

○ Internal promotion of Webex within line of business

Process

○ Continue execution of organization plan

○ Continue user education on best practices

○ Continue adoption event

○ Capture success stories

○ Promote new Webex features

○ Identify use cases for additional user groups

○ Ask users to complete "Deep Dive" module of Webex User Learning Plan and earn credential

Platform

○ Plan and deploy new features and/or expand Webex to additional user groups at your organization

○ Measure progress on utilization benchmarks for organization

Download resources for launch

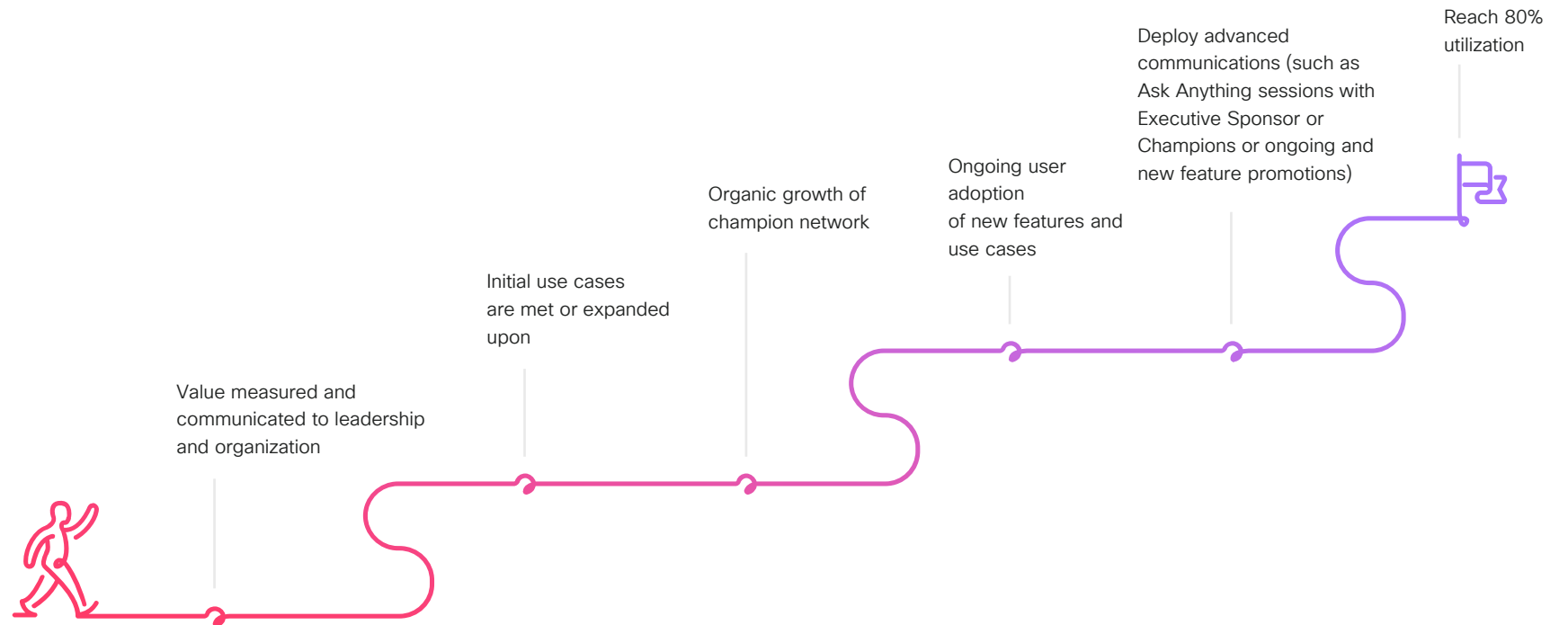Webex is constantly developing new features. Feel free to promote the ones most relevant to your organization.

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Adopt

Think of these milestones as guidance, not mandates, along your journey.
Choose the milestones relevant for your plan and business outcomes.

Reach 80% utilization

Deploy advanced communications (such as Ask Anything sessions with Executive Sponsor or Champions or ongoing and new feature promotions)

Ongoing user adoption of new features and use cases

Organic growth of champion network

Initial use cases are met or expanded upon

Value measured and communicated to leadership and organization

Optimize and champion

By this stage the goal is simple: Webex has become the new normal and your users not only love it, but they champion it. More importantly, you are successfully maximizing your Webex investment by optimizing performance of your Webex platform. That's why the Grow stage focuses on ways you can realize even more value through software updates and new feature rollouts. Quite simply, we want to help ensure your users love Webex and continue finding new ways to efficiently and effectively use it every day.

Grow

Optimize and champion

People

Adoption Lead

○ Continued engagement with key decision makers and stakeholders

Technical Lead

○ Participate in the Webex Beta Program
○ Advance in the Webex Ambassadors Program

Change Managers

○ Advance in the Webex Ambassadors Program
○ Identify additional use cases and business outcomes
○ Update existing use cases with new feature spotlights
○ Identify additional champions in organization

Executive Sponsor

○ Share success stories from across the organization

Champions

○ Complete Webex Ambassadors – Power User Learning Plan

Process

○ Change manager engagement on additional use cases and business outcomes
○ New feature rollout and use cases for integrations and interoperability opportunities
○ Continuous and programmatic Webex promotion and adoption

Platform

○ Enable new features and be on the latest version of Webex
○ Understand opportunities to improve performance and technical environment
○ Fully leverage entitlement and interoperability with purchased solutions
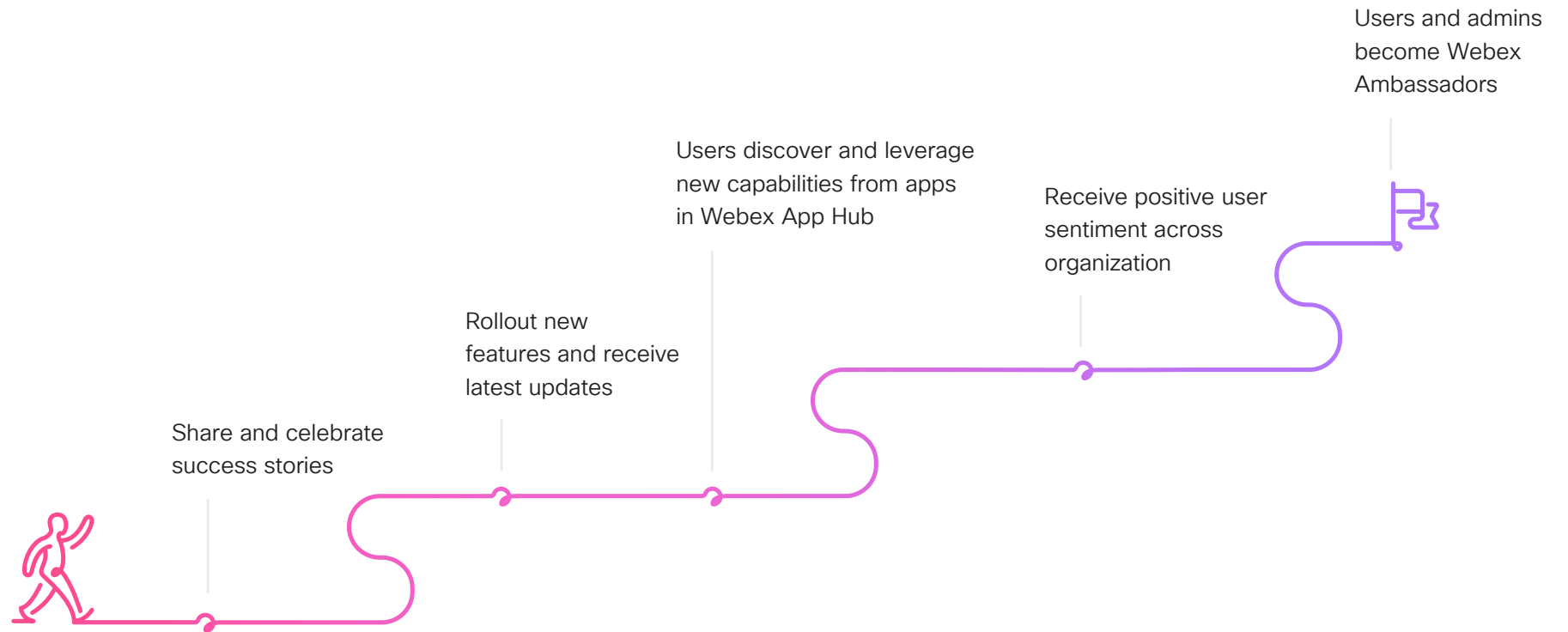
Download resources to grow with Webex

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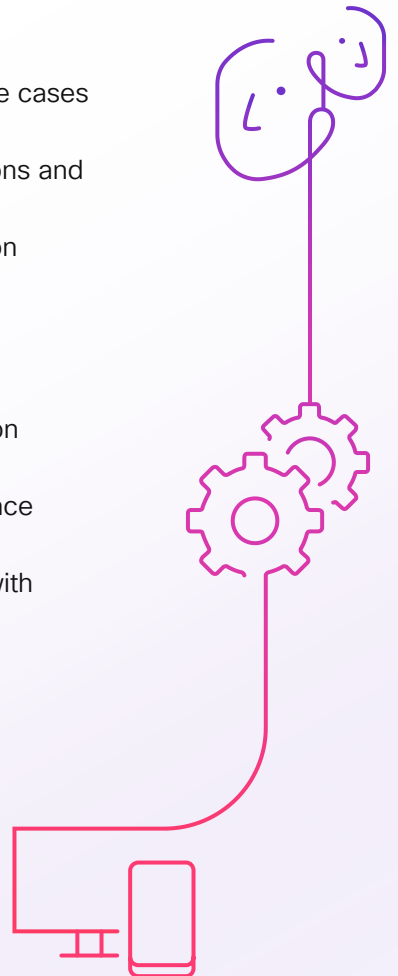
Optimize and champion

Think of these milestones as guidance, not mandates, along your journey.
Choose the milestones relevant for your plan and business outcomes.

Users and admins become Webex Ambassadors

Users discover and leverage new capabilities from apps in Webex App Hub

Receive positive user sentiment across organization

Rollout new features and receive latest updates
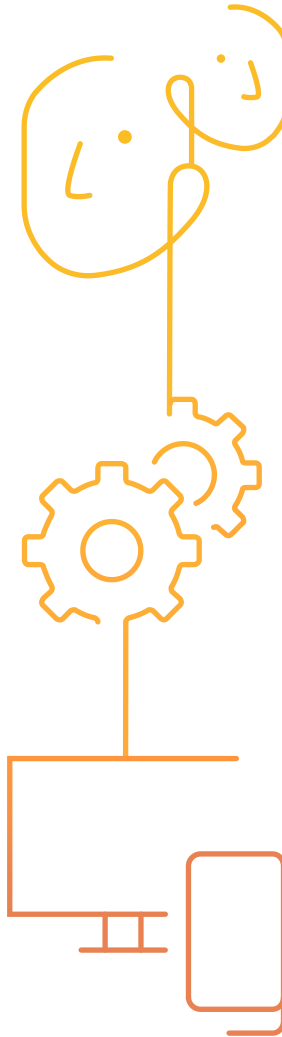
Share and celebrate success stories

03
Tips for your journey ahead

Best practices

As you prepare for your adoption journey, keep in mind the triad of People, Process, and Platform.

Your people influence adoption

Best practices include:

- Securing executive buy-in
- Establish ownership for adoption and change management
- Building a network of advocates

Your process helps highlight the value of Webex in a way that makes use a daily habit

Best practices include:

- Highlighting compelling Webex use cases
- Ongoing adoption campaigns
- Executing and revisiting change management plans

Your platform helps tailor the technology to best serve business outcomes

Best practices include:

- Achieving technical readiness
- Enable internal IT help desk and support teams
- Monitor and address environment-specific issues to stay on track to meet adoption targets

How to navigate the lags and hurdles

Let's say you're not seeing the level of adoption you had hoped for. In our experience, there are three primary explanations for why adoption might be lagging.

Lack of user awareness

A few tips:

Revisit your communication plan

Gamify the adoption process

Identify champions

Lack of executive sponsorship

A few tips:

Define the roles and responsibilities of the executive sponsor

Prepare the executive sponsors

Create an action plan for your executive sponsor

Users struggle to incorporate the app into daily workflow

A few tips:

Validate company use cases

Share best practices with Line of Business users

Your always-on guide

Feeling stuck? Need quick help or references? Webex Essentials is your ultimate 24/7 guide to navigating your adoption journey.

Webex Essentials

Adoption Resource Library

Technical resources

Classes and training

Get started with Webex

What's new in Webex

Customer success is always a click away

Our templates, tools, and guides are available for download as self-serve resources.

Help and Support

Webex Community

Become a Webex Ambassador

Webex GoLearn

Technical Demos

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Get early access with Webex Beta Program

Experience what's coming from our Webex collaboration portfolio before anyone else.

Join the program to get early access to our most exciting upcoming products and features.

Play around, tell us what you love and what needs work, and share any feedback you have so we can make our products better for you. Your voice is what will drive the future of Webex.

Beta Program

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04
Sharing your success

Understanding
success

Now that you are on this journey, it's important to check in on your success and make sure you're on track to meet your goals.

Your success is not only about tracking usage and having high user adoption, but it's important that your users and organization are getting value from the solutions you're using, ultimately ensuring you're getting a return on your investment (ROI).

To do this, success should be measured in three ways:

01   Usage

02   Business outcomes

03   Internal success stories
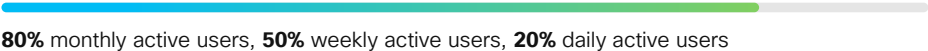
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Measuring usage success

It's important to set an adoption target for your organization based on usage. The analytics page on Webex Control Hub helps you keep track of how many members of your organization are adopting Webex.

There are several different data points to observe. In addition to the number of meetings or calls made, you can see how users are engaging with the application. This includes engagement with video, messaging, content sharing, file sharing, and even the types of devices being used to call, meet, and message.
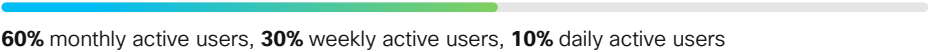
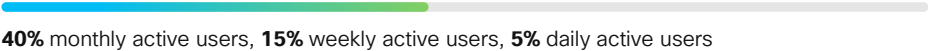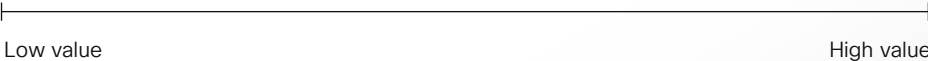Analytics for Your Cloud Collaboration Portfolio
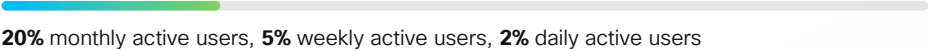
GoLearn course

Adopt

80% monthly active users, **50%** weekly active users, **20%** daily active users

Engage

60% monthly active users, **30%** weekly active users, **10%** daily active users

Use

40% monthly active users, **15%** weekly active users, **5%** daily active users

Onboard and implement

20% monthly active users, **5%** weekly active users, **2%** daily active users

Low value   High value

67% (or two-thirds) monthly active users is often the inflexion point for transformation.

Establishing usage goals

To track success, you should set some targets for the percentage of people using Webex on a monthly, weekly, and daily basis, and how quickly you'll achieve this. Your targets will depend on the size of your business plus the timescales and activities in your adoption plan.

For example, if you're rolling Webex out to 3,000 users over six weeks, your targets may be to achieve the following by week 24 of your adoption plan:

Monthly active users

80%

Weekly active users

80%

Daily active users

80%
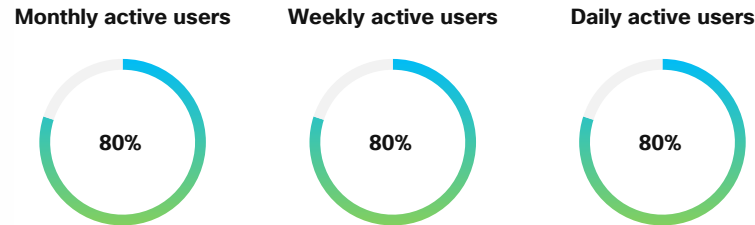
You may also set interim targets for weeks 10 and 15.

On the other hand, if you have a small team of 30 users, you may aim to achieve the following in six weeks:

Monthly active users

90%

Weekly active users

70%

Daily active users

50%
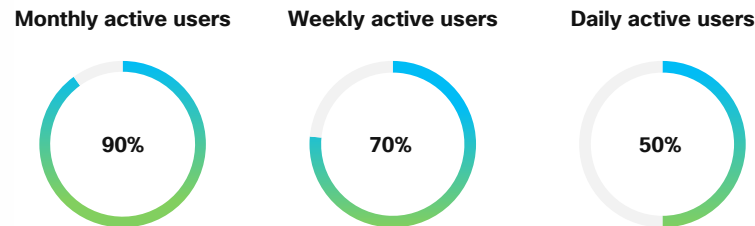
Only you can set appropriate targets for your business. The important thing is to consider your adoption plan and set ambitious but realistic targets for your people.

You can find this and other interesting usage information on the Analytics page of the Cisco Webex Control Hub, as well as on Webex GoLearn.

Validate your business outcomes

Increased usage is great, but only if it helps your organization accomplish its goals.

The first step in creating your Webex adoption plan was business drivers. Consider what performance indicators you might have toward those outcomes and where that data would come from within your business.

Business outcome
Enable hybrid work for your organization

Indicators that your outcomes are being met:

- Profitability
- Productivity
- Engagement
- Employee retention
- Decrease in office space needs, real estate optimization

Business outcome
Optimize communication and collaboration

Indicators that your outcomes are being met:

- Productivity
- Efficiency
- Engagement
- Agility
- Innovation
- IT tickets
- Travel reduction

For example, if you're a small but growing business, your aim may be to hire from a global talent pool without compromising on team effectiveness.

Your measurement may then be as simple as asking the team how well they're able to collaborate with the new recruits who work remotely.
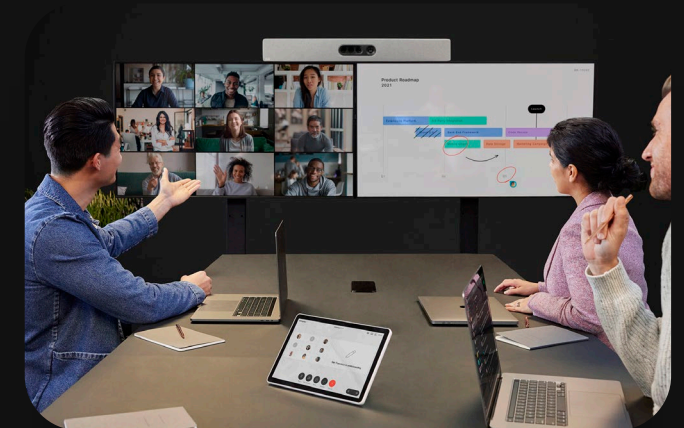
The bottom line is to understand what you want to achieve through high adoption of Webex and be prepared for how you'll measure it.

It's likely you'll need cooperation from other lines of business, like Finance or HR, to benchmark these numbers and report on them regularly going forward.

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Capture
success stories

Facts and figures tell us a lot, but few things bring success to life quite like compelling stories. It's important to watch for moments when Webex adoption enables remarkable things to happen, then share those stories as often as possible.

You can focus on one team within one department and talk about their efforts. Or you can concentrate on a group of people with a specific problem and showcase how the technology served as the solution.

Your network of champions will be an excellent source for success stories as they have the most insight into people's daily use of Webex.

Writing and sharing these stories will powerfully demonstrate the art of the possible and help others towards their own "ah-ha!" moments.

Usage analytics, backed up by business outcomes, then brought to life with real success stories are all you need to demonstrate success!

Reporting your success

01

Share up and out

Communicating your adoption success to those in your organization allow people to see a tangible example of what's possible. Be sure to check in with your executive sponsors and leadership so they can see the ROI. And know we're always happy to hear your success stories at Webex, too!

02

Reward and recognize

Recognizing the hard work of your Champions and others who contributed to success stories in your organization can be as simple as a shout-out in a meeting or a quick note to their manager to let them know you appreciate the time they're taking.
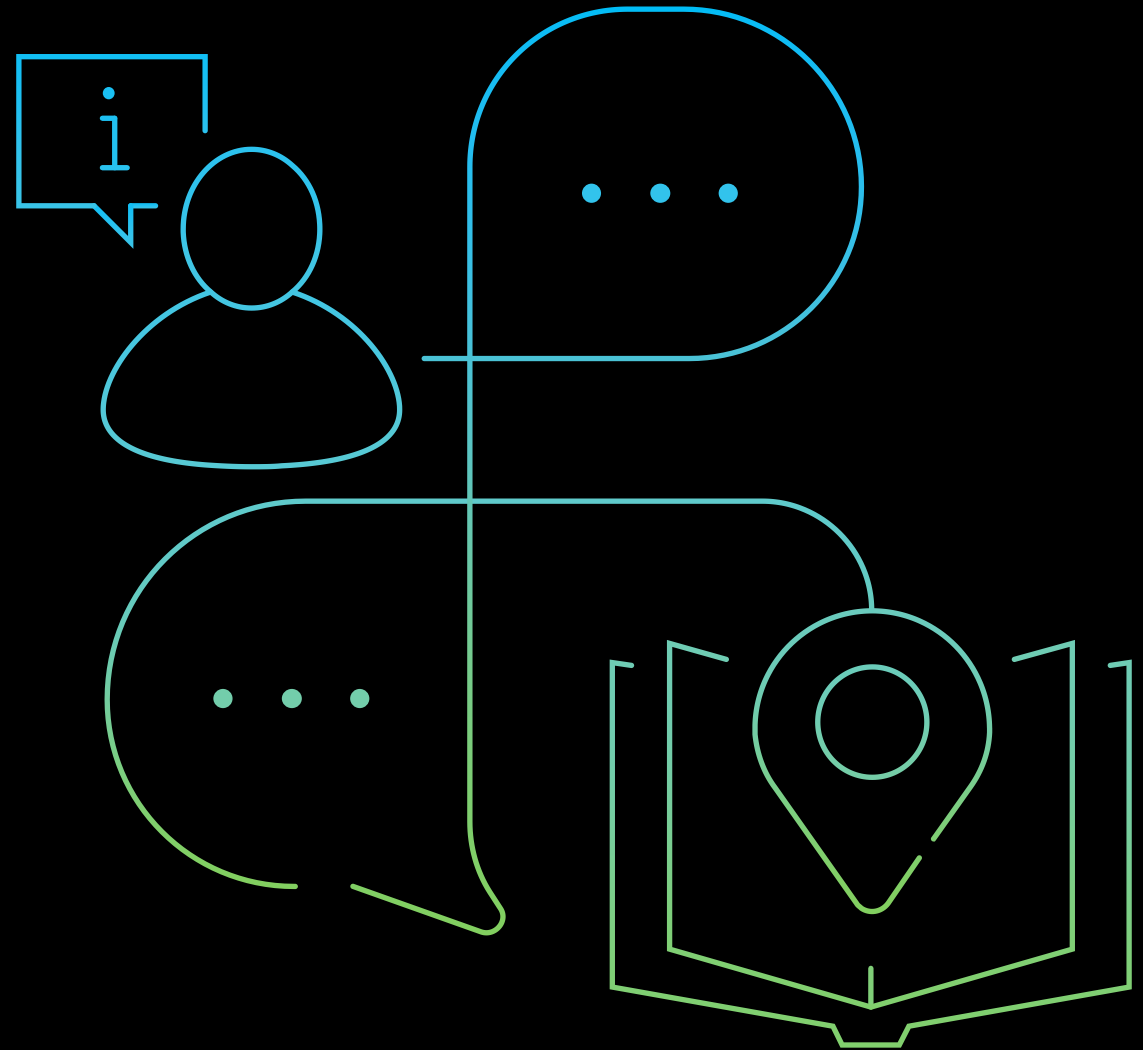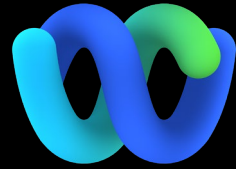
03

Identify and optimize

Find opportunities to expand or scale success across the organization, whether it's applying a use case to new teams or rolling out additional features to drive new business outcomes. Adoption is a continuous process, so revisit the journey each time you embark on a new destination.

Enjoy the journey—
we're here to help

There's a difference between taking a trip and going on a journey. A trip is about reaching a destination. A journey is about the experience of traveling to new places.

There are always new ways to utilize Webex. Therefore, there are always new heights for you and your organization to reach.