

## Transforming Cisco Sales Operations with Collaboration

### Increasing Scale, Efficiency, and Productivity in the Cisco Sales Force

Cisco has long been a leader in creating global value chains, extending work across time zones, languages, and cultural barriers. This geographic dispersion allows Cisco to source work more cost-effectively and position resources closer to customers. But it also increases the importance of skilled knowledge workers, and makes it more difficult for them to connect with the right people, resolve issues, and build trust.

Cisco has historically made major investments in communication and productivity tools aimed at helping employees work more efficiently. These tools have optimized many types of transactions. However, like many large enterprises, Cisco today faces human problems: delays and inefficiencies around person-to-person interactions. One area where human interactions are particularly critical is in global sales operations.

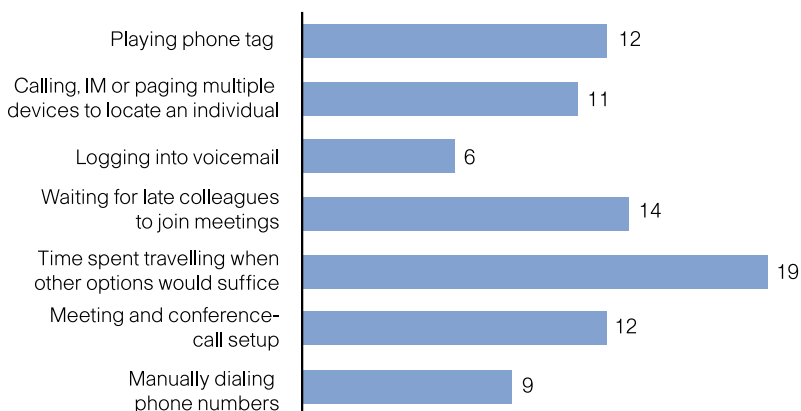
Cisco has aggressive sales targets, especially in rapidly growing technology areas. Meeting these targets through linear investments in expanding the field sales force would be a hugely expensive proposition, requiring several thousand new hires over the next five years and hundreds of millions in incremental operating expenses. Instead, Cisco leaders wanted to improve the overall productivity of existing field sales employees and help them accomplish more and work with more customers, while continuing to provide excellent service. Cisco identified three central challenges:

- **Improving sales productivity:** A survey of field sales employees revealed that a major barrier to improving productivity was complex and inefficient communications. Between making repeat return phone calls, having to use multiple devices to locate an individual, and other seemingly minor communications challenges, employees were wasting an average of 80 to 90 minutes per day. (Figure 1)
- **Scaling expertise and improving access to scarce subject-matter experts:** As Cisco expands into new technology areas and markets over the next several years, product expertise will become even more valuable, as account managers cannot cover the breadth of the Cisco portfolio on their own. Product specialists who are already in heavy demand will need to interact with more customers to answer questions and help close deals. Currently, however, product specialists spend more than half their time on tactical endeavors, such as finding answers to product questions, locating presentations, or finding the right speaker to put in front of a customer. (Figure 2) Cisco needed to optimize these valuable knowledge workers and help them shift more of their time to customer-facing activities and sales engagement.
- **Accelerating internal sales processes, such as deal approvals:** The Cisco sales approval process required extensive collaboration among internal and external stakeholders, and often became cumbersome for channel partners and customers. A high proportion of deals require management review, which can include an account manager, a regional manager, and a financial controller, depending on the size of the deal. Because the review process was largely handled via asynchronous communications such as email, it was inherently fraught with delays. Deal approval could take 24 to 48 hours in easy cases, and as long as two weeks in others. If time was of the essence to close a competitive deal, there was a chance that deal could be lost.

**Figure 1.** Inefficient Communications Were Sapping the Productivity of Sales Personnel

## 1 Cisco's Sales Imperatives

Driving Sales Productivity



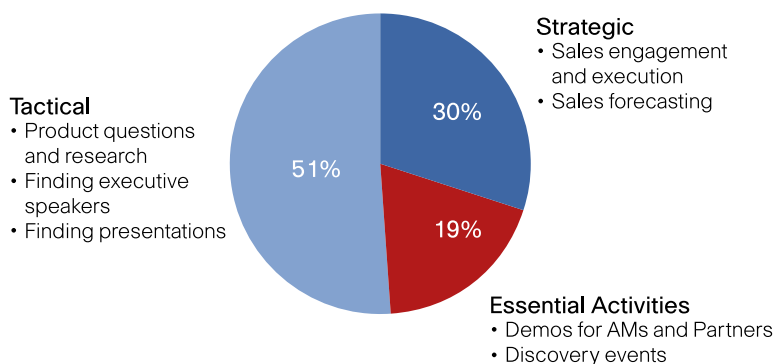
**80-90 minutes wasted per day on average**  
**due to inefficient communications**  
 (Average for 965 field sales respondents)

**Figure 2.** Product Specialists Were Spending Only a Small Portion of Their Time on Vital Customer-facing Activities

## 2 Cisco's Sales Imperatives

Scaling Product Specialists and Improving Access to Expertise

US/Canada Specialist Time Spent by Nature of Task (%)



**Need For:**

- Speeding access to specialists
- Driving productivity (reduce time in tactical tasks, optimize essential tasks)

To address these issues, Cisco launched three key initiatives, harnessing Cisco Collaboration:

- **Network Enhanced Workspace** aimed to equip the sales force with online collaboration and communication tools to increase productivity and improve the work experience.
- **Specialist Optimization and Results (SOAR)** provided a means to virtually scale product experts and enable faster access to their expertise globally.
- **Deal Acceleration** sought to speed deal approvals, reduce time to revenue, and improve Cisco sales and partner productivity.

Let's explore how each of these initiatives improved sales force efficiency and productivity by optimizing human interactions.

### Transforming the Sales Force Experience with Network-Enhanced Workspaces

In surveying field sales personnel, Cisco found that employees were spending much of their time trying to locate the right person or information, thereby wasting hours each week on inefficient communications, instead of productive tasks. The Cisco Network-Enhanced Workspace initiative provided field sales personnel with a variety of new collaboration capabilities aimed at providing instant or near-instant access to people and information. These capabilities included:

- **Streamlined voice communications:** Between pagers, office phones, and mobile phones, sales force employees were constantly checking difference voice mailboxes and constantly having to try multiple numbers to reach an associate. As part of the Network-Enhanced Workspace, Cisco integrated employees' mobile phones and desk phones, allowing employees to use a single phone number, voicemail inbox, and call log. Sales personnel can now easily move from a mobile phone in the car to a desk phone in their office. They can give customers and associates a single phone number and be reached no matter where they are: in the office, on the road, or even at home.
- **Fast access to colleagues and customers:** It may take only a few seconds to search for a phone number or access a directory. But for sales personnel who make hundreds of calls each week, those seconds add up. To address these common inefficiencies, the Network-Enhanced Workspace initiative provided a variety of new calling features for both office and mobile phones. Tools such as a "click-to-dial" directory and visual voicemail interface make it easier for employees to sort through voicemails and quickly reach contacts, without having to search for a phone number. Employees on the road can also use voice commands to search the corporate directory from their mobile phones and dial contacts.
- **Rich-media conferencing:** The Network-Enhanced Workspace provides sales associates with easy-to-use video and web conferencing capabilities that integrate video, chat, documents, and other tools, and give employees extraordinary flexibility to communicate and collaborate. Sales personnel can meet with customers and colleagues virtually, reducing travel and allowing them to accommodate more meetings (and interact directly with more customers) in the same amount of time. The result is that all stakeholders involved in a deal can stay better connected and reach decisions more quickly.
- **Ability to connect with colleagues instantly:** For field sales employees, few things are as frustrating as not being able to reach a colleague when trying to close a deal. The Network-Enhanced Workspace provides presence information for all sales personnel using the system, including real-time information about their availability and which device they are using. This information is integrated with instant messaging (IM), voice communications, video conferencing, and web conferencing on sales employees' PCs and mobile phones. With these tools, employees can quickly find the people and information they need, and rapidly resolve issues. For example, an employee with a question for a product specialist can check if the specialist is online and ask the question via IM. If more detail is needed, the employee clicks a button to turn the chat into a voice call. Another click can add video or web conferencing or bring other stakeholders into the conference on demand.

### Results

Today, Cisco account managers using Network-Enhanced Workspace tools have generated 3 percent higher average sales in 2009 than account managers without them. For a large enterprise such as Cisco with billions of dollars in annual sales, that represents a substantial revenue boost. These benefits are a direct result of the new collaboration capabilities, which allow sales personnel to meet with more customers, reduce travel time, work productively while on the road, and provide better service to their customers.

The Network-Enhanced Workspace tools are also improving employee productivity and satisfaction. Employees reported gaining nearly 40 minutes per day of productive time using the new tools. Projecting those gains out to the entire sales force (even assuming that only 40 percent of sales force users will adopt the tools), Cisco will gain an estimated 750,000 hours of productive time annually. In addition, 87 percent of employees using the tools reported a positive or outstanding experience. “Networked-enhanced workspace technologies give me back time that I can use to increase my product knowledge and meet with more customers, and make my life easier,” says one account manager. Another reported that the new collaboration tools “allow me to get my work done in a more timely fashion and squeeze more out of a day, while improving my quality of life.”

### Scaling Resources and Expertise with SOAR

The success of account managers may depend directly on their ability to respond quickly to a customer question. But with the relevant product experts dispersed across a region or around the world, finding the right answer quickly can be a challenge. In the past, if employees needed to answer a question for a competitive bid, they had three options: search the content on the Cisco internal and external website, query the immediate specialists they knew personally, and ultimately, send out an email to a virtual mailing list asking for help. Unfortunately, this process was not very efficient. Often, the necessary expertise was available, but the employees just didn't know who to ask.

To address these issues, Cisco leaders piloted the Specialist Optimization and Results (SOAR) initiative. SOAR provides a framework for locating the right information or person right away, no matter where they are located. It encompasses several new resources, including:

- **Self-help access to resources and expertise:** The first step for employees with a question is to visit the SOAR Engagement Portal to find self-help resources. Cisco created an online workspace with virtual expert and learning communities for each product. The learning space includes searchable discussion forums, so that employees can ask questions to the community and search through past discussion threads. The portal also includes downloadable marketing collateral, product specifications, training materials, and other product resources.
- **Rapid response team:** If employees cannot find the answer through self-help resources, the virtual communities also include access to specialists associated with each product. Employees can view real-time presence information for all experts participating in the community and click on any expert to instantly launch an IM session, voice call, or web conference.
- **Expert identification and access:** Even with all of these resources, account managers still encounter customers with unique implementations or questions that require the direct involvement of an expert product specialist. To address these situations, Cisco created an Expertise Locator tool that is a “mash-up” of telephony and presence tools with Google maps. Account managers can look up any subject or region with the tool (i.e., “unified communications; United States”), and view a map showing every Cisco employee who meets the search criteria. (Figure 3) The results show the experts' location and presence information, and users can click to launch a voice or video call, pull up the expert's calendar to schedule a meeting, or start an instant conference.
- **Virtual product demos:** Expert product specialists were spending significant time providing demonstrations to customers, often performing the same demo at multiple customer sites. The SOAR project virtualized those demos. Today, product specialists schedule regular demos through the SOAR portal, and account managers can invite their customers to attend virtually via web conferences. Using interactive conferencing tools, customers can ask questions during the demo, as well as listen to questions from their peers who are also attending.

**Figure 3.** SOAR Tools Such as the Expertise Locator Make Product Experts More Accessible, Allowing Them to Interact with Twice as Many Customers



## Results

The new SOAR tools have made it much easier for employees to find resources, whether they exist on a webpage or in the mind of an expert, and made a significant impact on Cisco's bottom line. Product specialists report interacting with twice as many customers as they did previously, allowing them to devote much more of their time to customer engagement, instead of tactical and research activities. In fact, these tools allow Cisco to save the cost of one full-time employee for every five specialists using SOAR. For a 100-person team of specialists that can now do the work of 120, that savings equates to more than US\$5 million per year.

SOAR has also delivered significant improvements in employee efficiency. Product specialists and sales engineers report saving more than two hours each time they use the Rapid Response Team and Expertise Locator tools. Travel expenses for Cisco product specialists are down by as much as 60 percent in teams using SOAR tools, and specialists report saving 17 hours a week on average, and boosting their productivity by 22 percent.

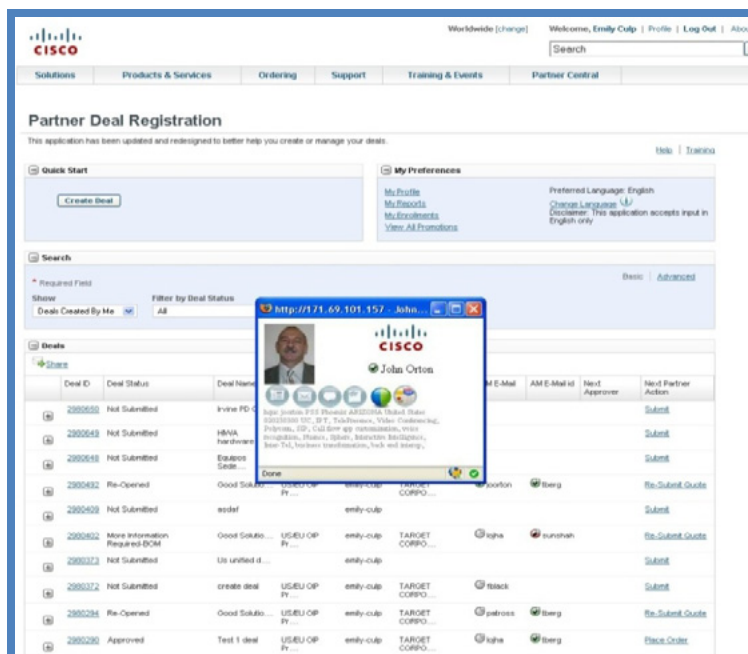
## Deal Acceleration

Managing enterprise technology deals on a global basis can be a complex process, and multiple layers of review are often unavoidable. But with so many people involved in reviews, closing deals was too often a lengthy, cumbersome process for Cisco channel partners and customers. Cisco leaders believed that the key to optimizing deal approvals was allowing all stakeholders to collaborate more effectively in real time. To accomplish this, Cisco integrated its Partner Deal Registration tool, the primary interface for entering and approving deals, with a variety of collaboration tools. The solution extended powerful presence and collaboration capabilities both within and outside the Cisco firewall.

Today, a channel partner can log into the portal and see not only all of the deals that they are currently working on, but also all of the Cisco stakeholders who are involved in those deals, as well as employees' presence information. In the past, a partner with a question would have to email the Cisco employee and wait for a response, which was a

frustrating delay for both the partner and the customer. Today, partners can see if Cisco employees are available even as they are entering a deal. They can launch an IM session, voice call, or web conference with a click of a mouse and get answers to questions immediately. (Figure 4)

**Figure 4.** New Partner Deal Portal Lets Channel Partners See the Real-time Status of All Cisco Stakeholders Involved in the Deal



As part of the Deal Acceleration initiative, Cisco also plans to launch new mobile access capabilities for Cisco account managers and regional managers, who are often on the road. Today if account managers are traveling all day, they receive an email that a new deal had been entered, but they may not be able to log into the Partner Deal Registration portal to approve it until they return to the office. In future, the collaboration-enabled portal will automatically call the Cisco manager responsible for approval when a deal is entered (and automatically route calls to an approver's mobile phone if the manager is on the road). When the manager accepts the call, the system will use text-to-speech capabilities to read the description of the deal. The manager can then accept or decline the deal, defer the decision, call the previous approver, and add a voice message to the approval to provide input for the next approver, all from a mobile phone.

## Results

When the new Deal Acceleration tools are fully deployed across the entire sales force, Cisco expects the tools to have a substantial effect. Based on the number of deals each day that require approval, Cisco anticipates nearly \$30 million in increased sales productivity and an additional \$15 million in partner sales productivity. Cisco also expects to capture revenue much faster thanks to these enhancements, with a \$60 million bottom line increase during the first year of full implementation.

## Succeeding on the Collaboration Journey

Clearly, collaboration is having a profound effect on the Cisco sales force's ability to work productively and efficiently. As sales personnel take advantage of collaboration tools to expand real-time access to people and information, they are eliminating delays and wasted effort associated with traditional asynchronous modes of communication, and optimizing many person-to-person interactions.

Cisco continues to examine the ways that sales force personnel communicate and conduct business in an effort to identify areas where greater collaboration can make a difference. These improvement activities include sharing best practices and lessons learned from each phase of the sales force collaboration initiatives, and continually searching for new ways to optimize human interactions. By building collaboration around existing processes and behaviors, instead of deploying a new technology and asking sales personnel to adapt to it, Cisco is creating a flexible collaboration strategy that can continually support changing business demands.

To find out more about Cisco Collaboration, visit [www.cisco.com/go/collaboration](http://www.cisco.com/go/collaboration)

To learn more about how to develop collaborative culture and processes in your organization, read the Cisco Collaboration Framework at [http://www.cisco.com/en/US/solutions/ns340/ns856/ns870/ns952/collab\\_exec\\_guide.html](http://www.cisco.com/en/US/solutions/ns340/ns856/ns870/ns952/collab_exec_guide.html)



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