Tivoli AVP - Process Refresher Training

11-September-2012

Michael Hoeft

Janis Thomas

@business on demand.

Tivoli AVP Process Refresher Training (TAVPRT)

- PRT - (JT)
- Executive Summary - (MH)
- AVS Responsibility – (MH)
- ROI – (MH)
- Evangelist Role – (JT)
- Sales Lead - (JT)
- Audit – (MH)
- AMPS Updates - (MH)
- AVP Chat – (JT)
- Weekly Brown Bag - (JT)

Tivoli AVP Process Review

- Objective – Leverage valuable information sharing across Tivoli AVP team
  - Review need for new processes or improve existing processes
  - Ensure action items are tracked and completed
  - Coordinate with AVP management to ensure adequate representation, attendance and participation

- Collaboration – How PRT information is shared with AVP team
  - Information will be shared with WW AVP team in Process Refresher Enablement
    - *Every Six (6) Months*

Executive Brief

- **A Key Element in your Quarterly Report**
- **Background**

1. Priorities/goals that are strategic to the business' success this year
2. Any current situation/Issues
3. Contribution from AVP towards meeting the above priorities/issues this quarter
4. Recommended Actions targeted for next quarter
5. Expectations/benefits
6. Overall Account Status/Temperature Summary

Executive Brief

Purpose:

- To proactively communicate an existing or high potential of a critical customer situation to executive management in a clear, concise manner

Key Elements:

- Customer temperature and stability (red, yellow, green)
- Brief clear description of the status, or description of progress since last summary
- Action plan including the priority, action, owner, timeline (projected hour/date to complete)
- *Key IBM and Customer Contacts*

Implementation:

- Brand implementation consistent in key elements, though vary in format
- Cross brand template exists in QMX
    - https://d01db034.pok.ibm.com/q_dir/qmx/swg/qh0dl.nsf/procnum/CSP-0008

AVS Considerations

Constantly Ask →

How can I Contribute to Value Add for my AVP Customers?

Proactive and Customized Support

- ✓ Customer Focused Product Management Assistance
- ✓ Installation, Upgrade, and Migration Assistance
- ✓ Staying informed about product updates and new technologies
- ✓ Knowledge Transfer
- ✓ See next slide of Value Add Ideas

Engage Additional Resources as needed
… AVLs, Managers, Lab Advocates, SMEs

Contribute to AVP Best Practices Initiatives
… Review AVP Refreshers
… Participate in Monthly AVL/AVS Meetings
… Volunteer for BP Initiatives (via Manager)
… Share what WORKS with rest of Team
… Help provide Consistency and Efficiency to Team

Knowledge Sharing Sessions
… Invite your Customers to Attend/Participate
… Forward Playback Links
… Solicit Ideas/Recommendations for future sessions
Work with Segment Champions
… Actively Participate in Inner Circle meetings
… Suggest topics for Discussion
Keep Customer Updated on Offerings
… Vouchers, Training, Tools

AVS Responsibilities - Value Add

- Customer Question: Which of these are items that you might want to do throughout the year.
    - Proactive/Customized support
    - Customer focused product management assistance
    - Installation, Upgrade, Migration Assistance
    - Assistance with Customer environment
    - Knowledge Transfer
  - ✓ What items are of most value to them.
  - ✓ Items we would include in the Delivery Plan.

- Geared towards traditional AVP Full Contract
  - ✓ Not specific to special offerings which have their own specific features:
    - AVP Express, AVP Go Live, AVP Cloud Computing

AVS Responsibilities – Menu of Services

- Building a "Menu of Services" can provide the following benefits:
  - ✓ Simplify purchase of AVP services by giving clients concrete examples of what we deliver
  - ✓ Encourage larger contracts:
    - By identifying how much effort each item requires, then letting a client pick, they should ask for more than if they just guess.
  - ✓ Encourage existing clients to better utilize their contracts
  - ✓ Increase consistency across AVP
  - ✓ Help us build an asset base

AVS - Value Add Ideas for Consideration

Sr No	AVP Value Add	AVP Deliverables	Examples
1	Proactive and customized support	• Custom Troubleshooting and Scripting • Remote Administration and Cleanup • Assistance with Disaster Recovery Planning • Facilitate Architecture review and assistance • Capacity / Performance analysis and tuning • Recommendations on backup and recovery procedures • Recommendations on security precautions	• Onsite days used to review product plans, and make a recommendation for product usage and potential growth. • Follow-up 18 months later with an updated plan - Both times a formal document outlining the findings • TSM Environment cleanup, Disaster Recovery, and Capacity Planning • Architects working to review questions related to TSPM * Accelerated Value Leader's weekly cross-brand team meeting
2	Customer Focused Product Management Assistance	• Maintain and track customer enhancement requests • Facilitate Product management sessions • Facilitate regular meetings to review and define enhancements requests based on customers business priorities • Work with IBM product management teams to ensure continuous progress is being made on enhancement requests	• Liaison with various teams within organization to capture requirements for technpack upgrades and manage the delivery of those requirements thru upgrade roadmap aligned with thier business needs • Initiate and maintain the relationship with customer network equipment vendors for procurement of Documentation and Sample data in support of IBM TNPM Engineering forces for Probes/Tech-pack upgrades • Manage Scope/Requirement Document Reviews and Approval process for each TNPM techpack upgrade • Facilitate Cross-Brand Involvement • Assist with Was 6.1 35 Upgrade- Collaborate with WAS AVL • Assist with DB2 9.7 fp3 Upgrade- Collaborate with DB2 AVL
3	Installation, Upgrade, and Migration Assistance	• Assist customer with installation and configuration • Custom APAR delivery thru iFix / LA Fix, Special APAR Reports • Check of environment and OS levels for installs Upgrade Assistance • Patch Strategy Recommendations • Facilitate weekly and ad-hoc meetings among IBM development, Customer, and their 3rd parties for resolving issues arising on daily basis around release/fixpack roadmap planning and implementation	• Weekly Non-GA APAR / Internal Defects list • AVS TDS LDAP migration and consolidation • Custom installation scripts created for TAM Migration/Installation • Custom APAR delivery thru iFix / LA Fix and Special APAR Reports • Production environment Support 7.1.1.4 on DB2 9.7. • Maximo 7.1.1.8 Upgrade (CCMDB, TSRM, TAMIT 7.2) Dev3 Environment. • User load scale support - current user load 2800+
4	Assistance with Customer Environment	• Set up and maintain a test environment similar to customer • Test Environment Recommendations • Review of Customizations	• Daily Touch Point Meeting with various teams within Customer Sites • POC assistance - e.g. WAS MQ Design VS SiBus JMS • Assistance in creating Maximo Vanilla VM • Provide assistance in creating or upgrading development environments at client site • Collaborative with IBM Development, DE, and L3 teams in India to help resolve critical upgrade issue with TSRM 7.2.1.1FP (this saved customer opening critsit and was able to continue the rollout and maintain Go-Live Date)
5	Knowledge transfer	• Access to user groups and advisory councils (peer collaboration with other AVP customers using same products) • AVS deliver hands-on customized product training • Ad-hoc assistance to end users on how best to solve their needs using the existing tool capabilities • Process consulting and technical workshops • Facilitate access to IBM's SMEs and Architects for assistance with customer's focused needs	• Maximo Advisory council - where all AVP customers get together to discuss, share and learn best practices from each other • AVP Knowledge Sharing Sessions - only available to AVP customers. The topics that are presented could actually include topics on any type of AVP deliverable.

AVS Summary

Constantly Work To Provide Value Add for your Customer

- ✓ *Understand Best Practices and AVS Responsibilities*
- ✓ *Develop an Ongoing Client Relationship through an Understanding of your Customer's Lifecycle and Business Environment*
- ✓ *Make Use of Existing Training, Meetings and Best Practice Initiatives*
- ✓ *Engage Other Resources as Needed*
- ✓ *Be a Go-To Person for AVP*

Strategic Client ROI Analysis

•Goal to analyze ROI of AVP contracts for all strategic clients with over $200k AVP spend..
•Measuring ROI in 4 key areas:

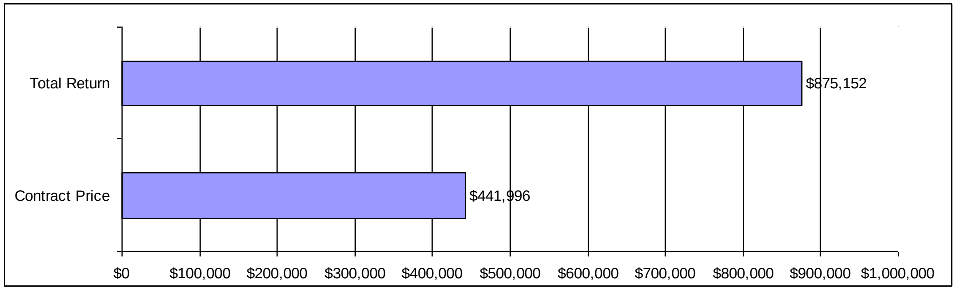
- Productivity Savings– time saved by customers in dealing with IBM products.
- Knowledge Sharing – participation in education (AVKS) sessions, training hours and consulting.
- Staff Advisement –handling support-related tasks that customers would otherwise have had to deal with directly.
- Risk Avoidance – mitigate productivity loss related to outages, performance bottlenecks, loss/corruption of data, and delays in delivering results.

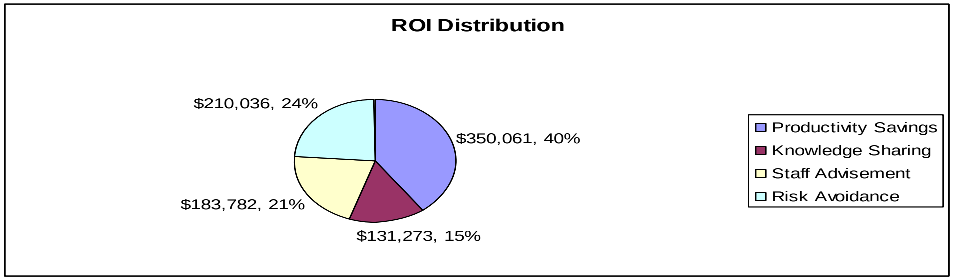
•Results intended to reinforce value to existing clients to ensure strong renewal rate, and provide sample ROI to prospective clients.

•Tivoli Top Twenty (20) AVP Strategic clients (all having positive ROI) with an overall **average ROI of 98%**

- AVP Contract Avg. $440k
- **Avg. Return On Investment (ROI) = $875k**

Tivoli Strategic Client Averages



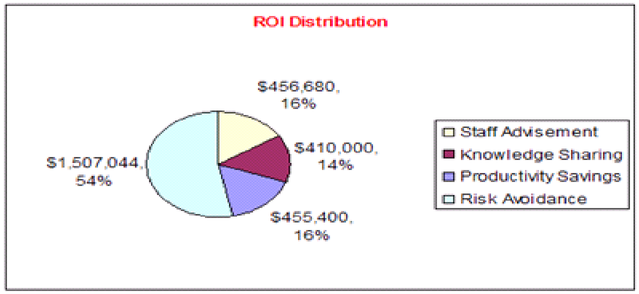


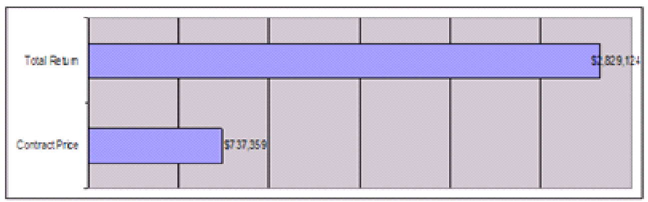
Example Usage of ROI

Projected ROI on Potential New Allocations - Tivoli AVP

ROI Study Results Looking forward using Potential New Allocations table above:

AVP - Return On Investment (ROI) Calculator		
Customer		
Brand	Tivoli	
Industry		
Contract Price (Example)	$737,359	
# Administrators		
# Developers		
# Named Callers		
AVL FTE	1	
AVS FTE	0.75	
(L2 Pickup FTE)	0.58	
AVS/L2 FTE	1.33	
OS/EOS days	10	
	Amount	**Percent**
Staff Advisement	$456,680	16%
Knowledge Sharing	$410,000	14%
Productivity Savings	$455,400	16%
Risk Avoidance	$1,507,044	54%
(L2 Pick Up)	$488,824	
Total Return	**$2,829,124**	
Annual ROI	**284%**	



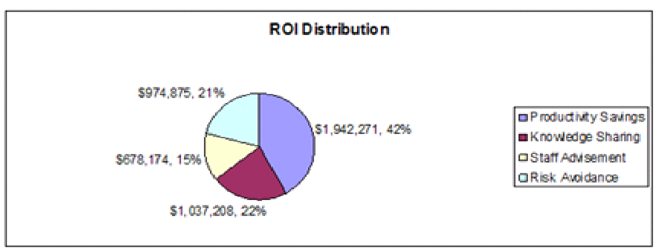


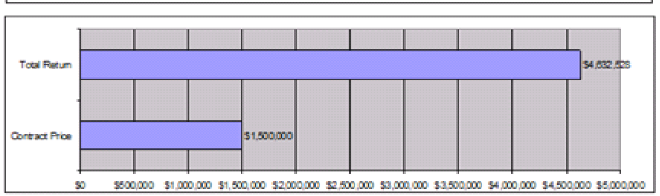
1. ROI projections for a New Proposal using the presales ROI v2 tool based upon the new resource allocations.

ROI on Current Allocations - Tivoli AVP

ROI Study Results using Current Allocations

AVP - Return on Investment (ROI) Calculator		
	Tivoli	
Contract Price	$1,500,000	
Total Value Delivered	$4,632,528	
ROI Distribution	Value	%
Productivity Savings	$1,942,271	42%
Knowledge Sharing	$1,037,208	22%
Staff Advisement	$678,174	15%
Risk Avoidance	$974,875	21%
Return on Investment	$3,132,528	
ROI (in percentage)	209%	





2. Tivoli AVP ROI pulled from the standard ROI v1 tool based upon standard AVL questionnaire from current allocations, and completed AVP activity.

Tivoli AVP ROI Process

ROI Results:

Ad Hoc Requests – generated on demand after request from management or sales.

Six (6) Months after contract start, depending on contract length.

Case Studies

Ad Hoc Requests – generate on demand after request from management.

Six (6) Months after contract start, depending on contract length.

- Update each quarter

Single Repository for Results:

Wiki / AVP team room database

Tools:

xBrand AVP ROI v1 (based upon 20 question AVL questionnaire, post delivery)

xBrand AVP ROI v2 (presales, projections)

ROI Team Review : The ROI Team members review our customers and make sure they are updated accordingly:

- Update ROI Results Spreadsheet
- Update Case Study

We may include in the AVP Audit Process in the future.

Evangelist Role

- True "Evangelizing" of AVP
  - Seeking opportunities to educate and create awareness of AVP
    - SW Sales, Support, Development
    - Meetings, Conferences, Communities
  - Establish network for people to understand who to engage

AG Sales Evangelist
Paul Gardiner
Glen Musick
Mark Vanderboll

EMEA Sales Evangelist
Pete Goudbourne
Judith Hamilton

India & AP Sales Evangelist
Kiran Garapati

- Prospect Identification
  - Review/qualify opportunities submitted into AVP Sales Lead Tool
  - Identifying potential customers through self-analysis
    - Top PMR generators, CritSit contributors, Large S&S spend

If lead is identified as one that has significant justification for AVP, the Evangelist will work with AVP Sales Team to hand over lead

What Constitutes a Good AVP Candidate?

- Is Customer often in Crit Sits or raising many S1's?
- Does Services get sent on-site just to "save the account"?
- Are License renewals or New License opportunities at risk?
- Does Customer have mission-critical applications?
- Is Customer's software sitting on the shelf?
  - ➔ Do they consider Tivoli SW too complex or do they lack skills?
- Is there a pending upgrade, migration or new deployment?
- Is Customer asking for a more Proactive Support Model?

AVP Sales Lead Tool

- Available to submit potential AVP Sales Leads
- Can be accessed via Request Central:

http://rcserv.tivlab.raleigh.ibm.com/rc/index.html

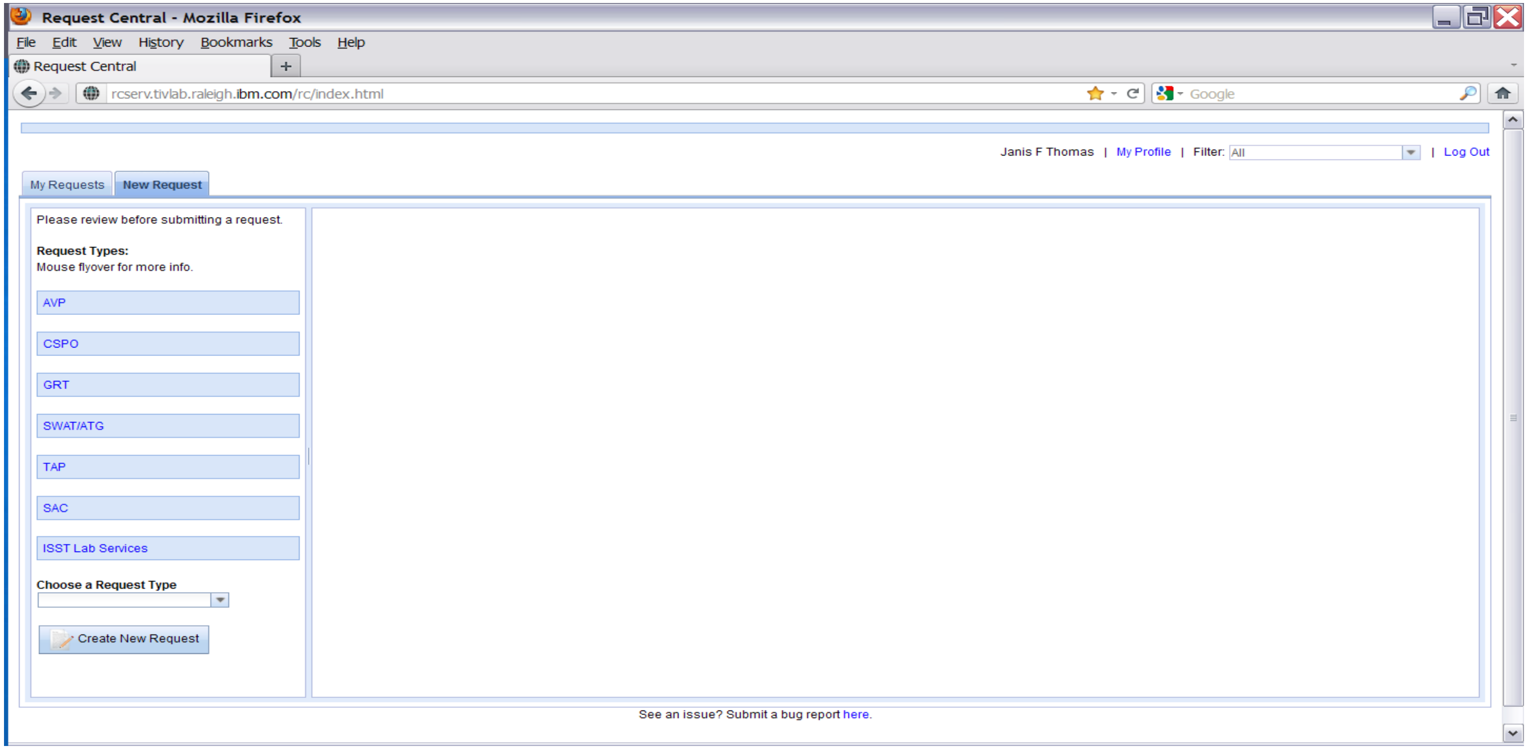
- Click on “new request” and then select “AVP”
- The information will be qualified, reviewed and evaluated
- Status will reflect current action

AVP Sales Lead Tool

Accessed via Request Central tool:

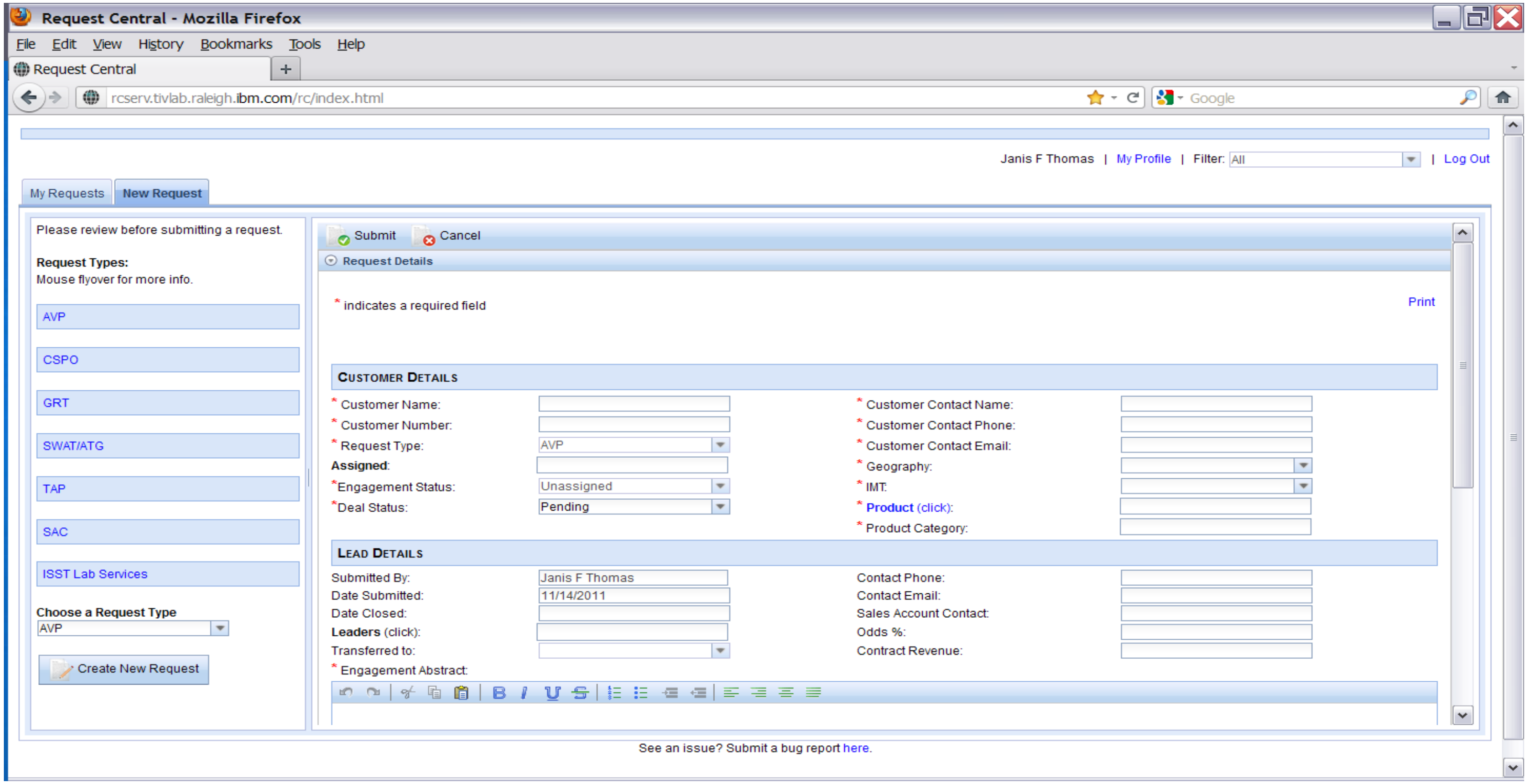
http://rcserv.tivlab.raleigh.ibm.com/rc/index.html

Click on “New Request” and then select “AVP”



AVP Sales Lead Tool

Note: Fill in as much detail as possible to explain why this is a good AVP Lead. There is an Engagement Abstract section under the section shown below where you can fill in additional comments.



Audit - How is Excellence of Service Delivery Defined

- **Commitment to the future, continuance of the planned service delivery. A good understanding the clients needs.**
- **Perceived benefit or value by the customer for the delivered service.**
- **Regular customer contact (conference/meetings/visits) and feedback about their level of satisfaction.**
- **Tangible evidence of service delivery relevant to their stated requirements.**
- **Good responsiveness (how quickly the need was serviced).**
- **Evidence of best-practices delivery**

Audit - How do we assess Quality?

- **The Delivery Plan:**

  If the assigned AVL was absent, could another AVL not previously associated with the account, be able to find the goals for specific period and key delivery dates? Would they be able to step in and take action and communicate the plan with the customer contacts?

  The plan must be filed within AMPS and contain sufficient detail for the current period. It must be shared with the customer, either distributed or available via the Support Portal.

- **Quarterly Report**

  Are the activities easily recognizable and match what is detailed in the ES and DP? Is there sufficient activity relative to the AVL's percentage allocation?

- **Executive Summary**

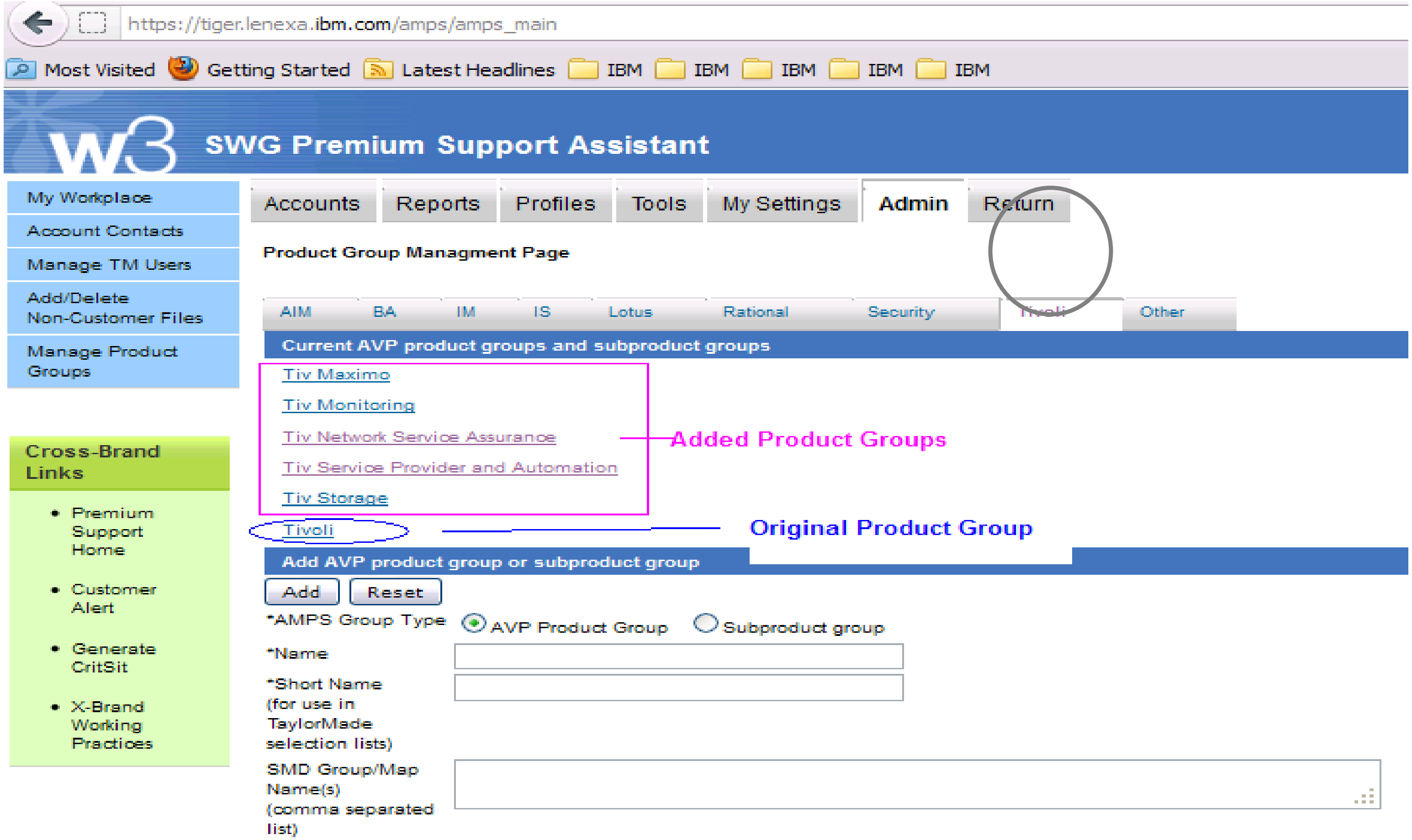
  If I were the customer executive and read the executive summary, would I have a good feel for what the customer wanted to achieve and their goals to make their business successful? What (if any) current issues they have and what contribution AVP is making towards meeting their priorities? Do I expect a hostile or warm meeting with the customer?

  The Executive Summary would need to be current and available within AMPS, and preferably available to the customer via the Support Portal, unless it contained sensitive internal information with regards to any escalation. There should be an emphasis on highlighting benefits and value from AVP efforts.

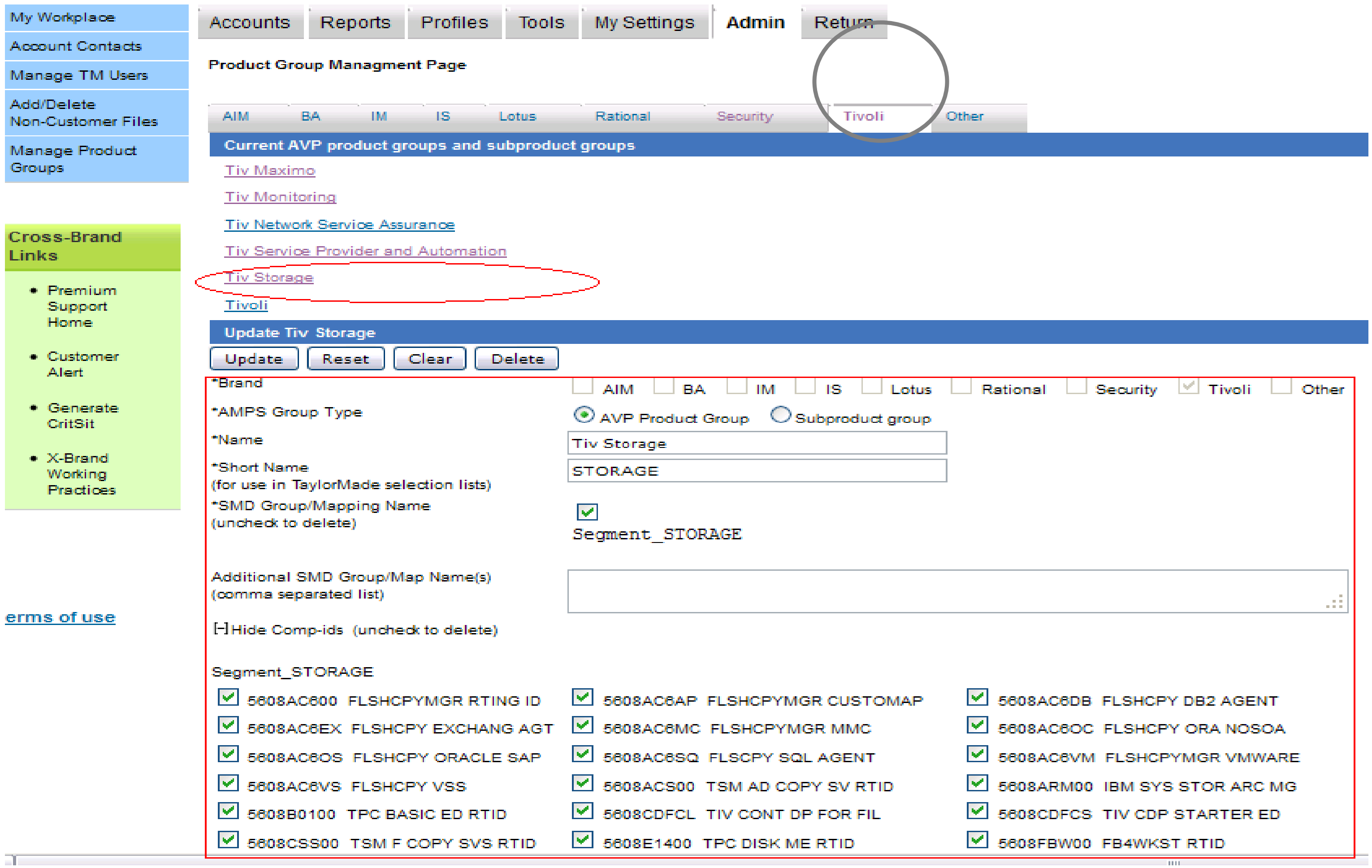
Audit - How do we rate Quality?

- 5 Star: Ready to approach customer as a reference, or for contract uplift. Excellent documentation over two to three periods.
- 4 Star: Expected to renew. Good documentation of service delivery.
- 3 Star: Average level of service quality, no major concern but room for improvement.
- 2 Star: More examples of service quality required, or documentation needs to be improved. (Renewal at risk)
- 1 Star: Basic service delivery and documentation. (Renewal at risk)
- Non-compliant, documentation missing. (Renewal at risk)
- Low scoring AVLs (1 or 2 star) will be audited more frequently

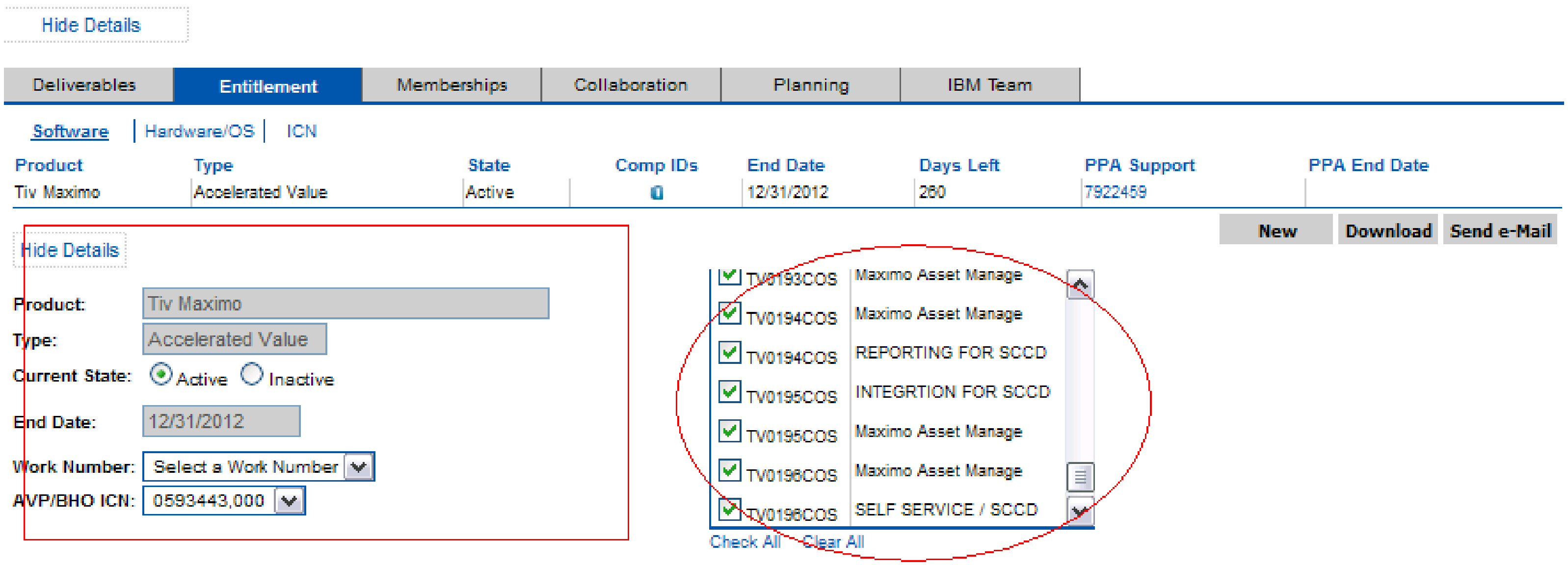
AMPS - Tivoli Brand & Product Groups



AMPS -Product Group & Comp-IDs



AMPS - Entitlement



AMPS - Subscriptions

*Note: Select the to enable subscriptions for contacts.

All | BA | Lotus | Rational | Tivoli | Other Contacts

Maunic Dharia	Technical	847-937-3574	Lotus			✓		✓	✓	
Raeanne Ruhl	Technical	847-938-4667	Lotus			✓		✓	✓	
Ragendar Ranga	Application Contact	(269) 270-1836	Cognos			✓	✓	✓	✓	✓
Ramu Amanchi	Technical	(847) 935-6490	Tivoli		✓	✓		✓	✓	✓
Rodney Poche	Technical	951.914.6749	Tivoli			✓		✓	✓	✓
Ron Shores	Technical	847-9389-9234	Lotus			✓		✓	✓	
Sarah Macintosh	IBMer	613-356-5869								
Sunitha Singh	Management	847-935-9150	Cognos		✓				✓	✓
Thomas Goshaw	Technical	847-938-4536	Lotus			✓		✓	✓	
Wilson So	Technical	847-937-9259	Tivoli			✓	✓	✓	✓	✓
Yogesh Thota	Management	8479366117	Cognos			✓	✓	✓	✓	✓

Prev | Next

New | Download | Send e-Ma

Hide Details

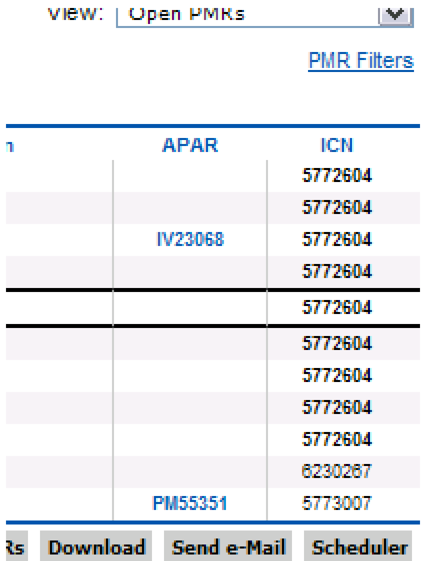
Info | Subscriptions | e-Mail Groups | ICNs | Collaboration

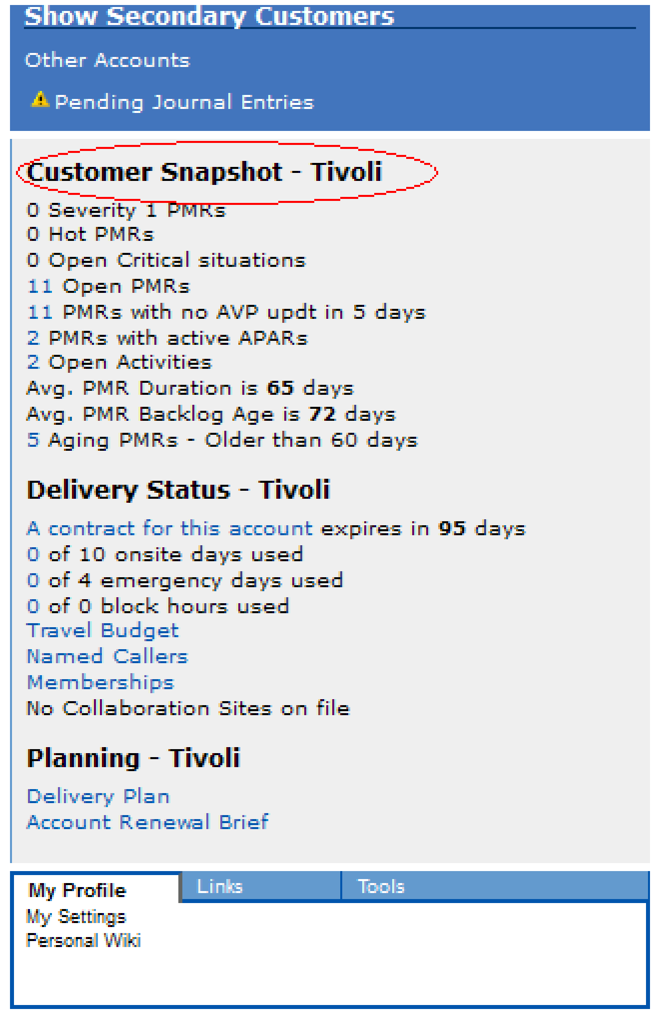
Note:
The default product list displays active Accelerated Value entitled products associated with **Rodney Poche**. Select the appropriate subscriptions by product that apply to **Rodney Poche**.

BA | Lotus | Rational | Tivoli

Products	Select All	Primary Contact	Named Caller	Survey	Tech Talks	Newsletter	APAR
Tiv Maximo	☐	☐	☐	☐	☐	☐	☐
Tivoli	☐	☐	☑	☐	☑	☑	☑

AMPS - Customer Snapshot is now Brand Specific



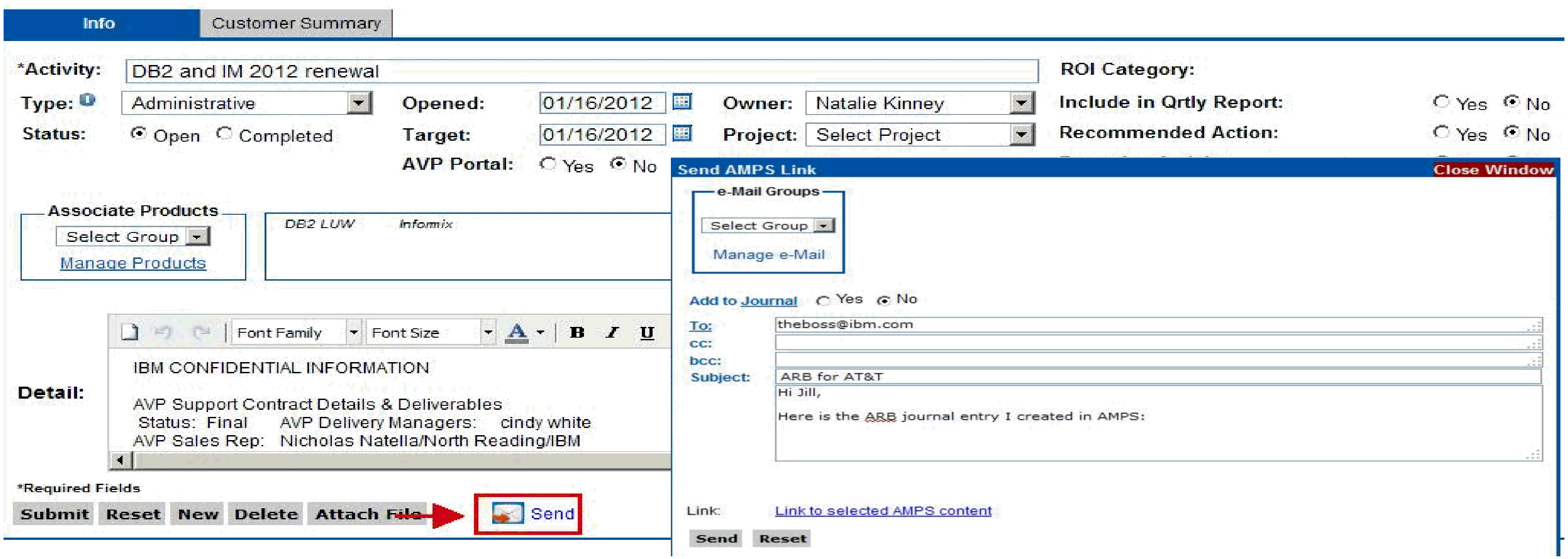


AMPS - Send A Direct Link to Content

- The "Send" icon on the "Info" tab in the detail section of a report will send a link to the item being displayed. This link will display this same item as long as it remains in the database. For example, unless the journal entry is deleted, the link to it will always display that journal entry.

- When the "Send" icon is clicked, a standard send e-Mail pop-up will display allowing you to enter recipients, subject, and some text. The link shown below the text box will be inserted in the generated e-Mail after your text.

- Note that anyone who receives an AMPS link in an e-Mail or otherwise uses a generated AMPS link, must still be a registered AMPS user. If they are not an AMPS user they will be prompted to register as a Read-only user or to request access at some higher level using the same access request mechanism that exists today. Also, users will not be able to access unauthorized features using a link that they receive. For example if an AMPS user with the AVL/AVS role tries to access a link to the back office, they will receive a page indicating that they are not authorized to access the requested feature.



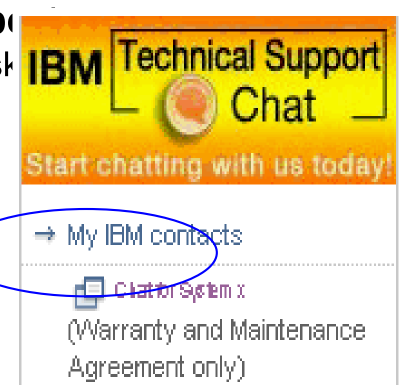
AVP Chat - Overview

Strategy: Provide AVP customers with a way to chat on-line with their IBM contacts. The tool provides clients a means to interact with AVP contacts in a more expedient way in real time, and encourages the use of the IBM Support Portal (one of the strategic tools for AVP).

- **Goals:**
  - Added value to the AVP offering with social software tools
  - Increased client satisfaction with the AVP Chat offering
  - Increased communication through convenience, efficiency and accuracy of instant messaging

- **Key features of AVP Chat**
  - No installation required by customer (use a web browser via “IBM Support Portal”)
  - Customer has real-time availability of their AVL's/AVS's listed in “My IBM Contacts”
  - On IBM side, it uses TechSupport Sametime community - no new tools required

- **AVP Chat advantages frequently cited by customers and IBM Supp**
  - Maintaining a real-time “life line” with the customer and the ability to “multi-task
  - Handling of quick status checks or updates
  - Communicating technical long command strings or web addresses
  - Communicating in noisy environments or where there's language differences



AVP Chat - AVL/AVS set up steps

AVP Chat Wiki page:
https://w3.tap.ibm.com/w3ki08/display/SametimeChat/AVP+Chat
Instructions to install the Plug-in: https://w3.tap.ibm.com/w3ki08/display/SametimeChat/Plug-in+Instructions
FAQs https://w3.tap.ibm.com/w3ki08/display/SametimeChat/FAQ

1) Verify in AMPS that the AVL/AVS and the AVP client named callers are listed. Modify any additional contact related content in AMPS to ensure it is appropriate for client viewing via the IBM Support Portal

2) AVL and AVS who plan to use the AVP Chat tool in the IBM Support Portal need to set up their Sametime client to connect to IBM AVP Chat:

   a) Add the Technical Support community to your ST
   b) Install the Technical Support Plug-In
   c) Change the Alert Notification time out value in ST – default is 10 seconds; can be extended to 180 seconds

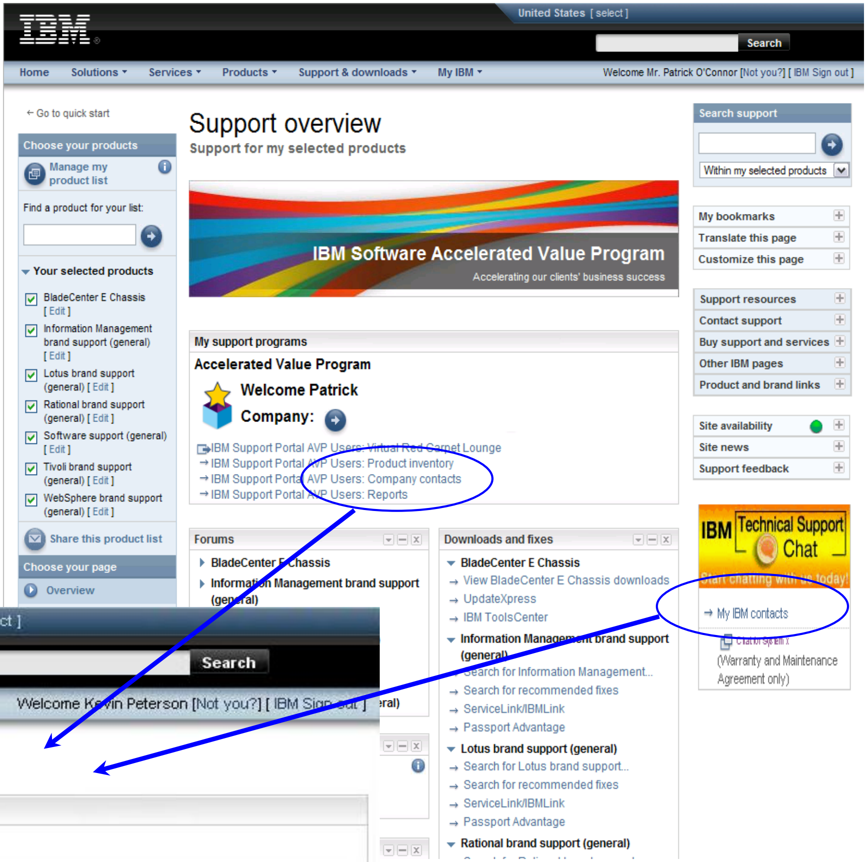
   *** Also make sure you are listed in the Tivoli Boarding Form (talk to Janis or Colin)

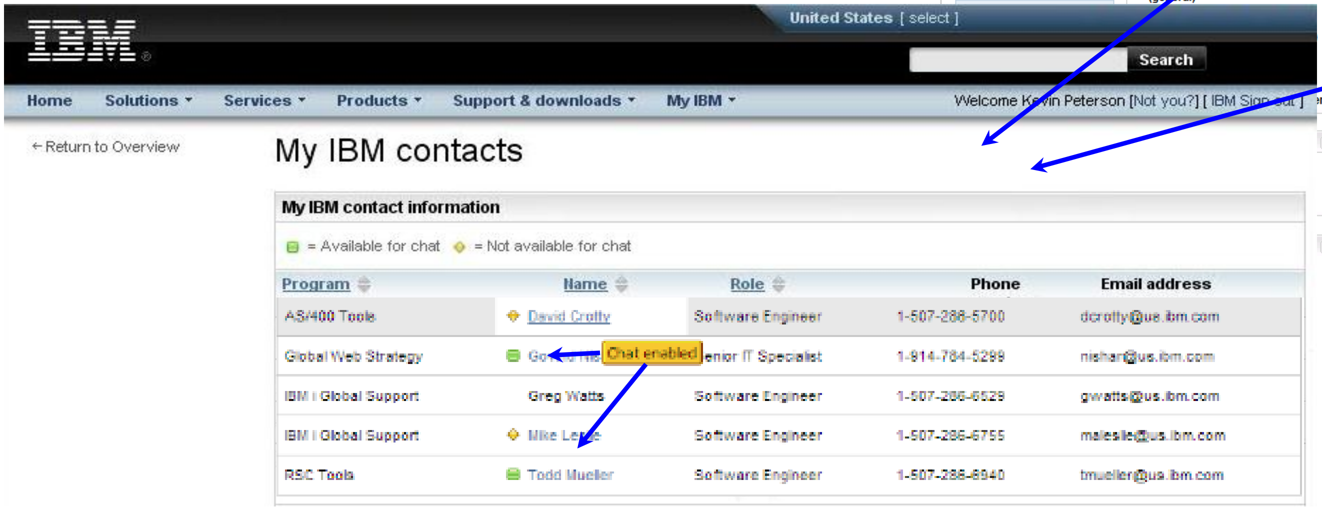
3) Set Customer Expectations:
   AVL/AVS are to ensure they set customer expectations on their availability with AVP Chat. We recommend as a best practice to let customers know when you would generally be available and on-line with AVP Chat. For example: 10am-Noon M,W,F, and 2-4pm Tues/Thurs.

Colin Thompson and Janis Thomas are the Tivoli Brand Contacts for AVP Chat

AVP Customer Experience

- AVP customer goes to the IBM Support Portal
- Displayed is the TS Chat Portlet where AVP clients click:
  - My IBM Contact's for participation in AVP Chat
- The "My IBM Contacts" page:
  - Shows the AVL's/AVS's availability based on real-time state in the Technical Support Sametime community
  - The customer can click on a name to initiate a chat request



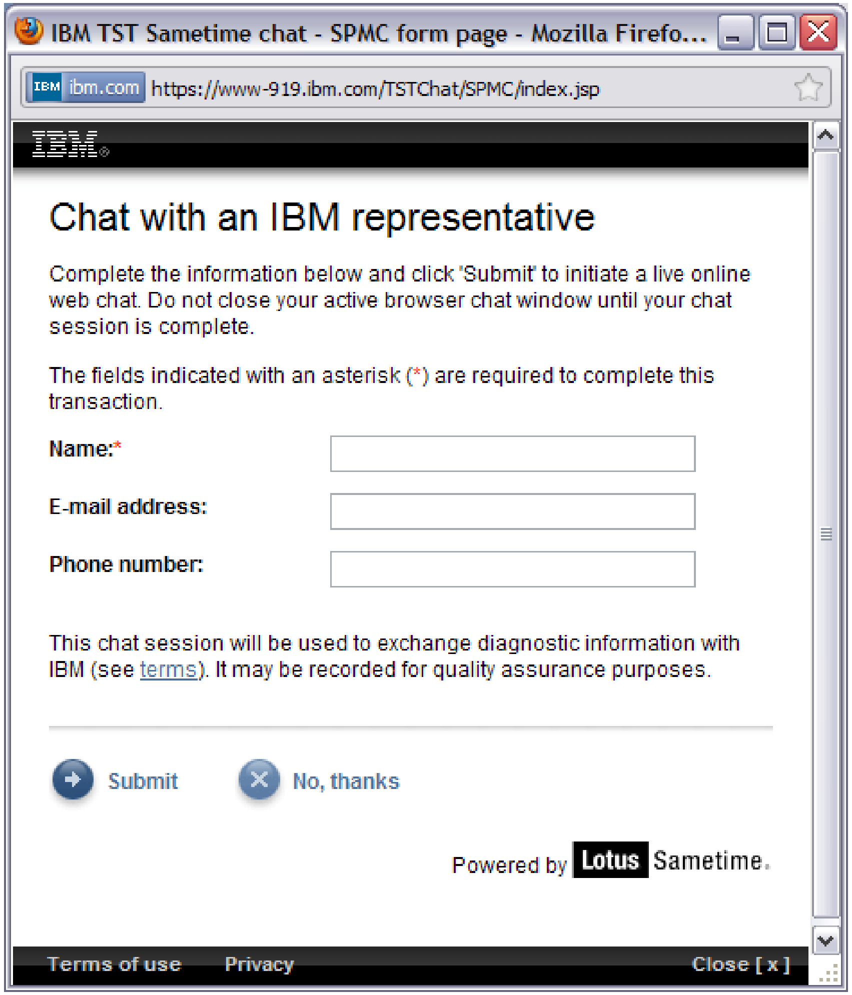


*Note: The IBM Contact must be enabled in the TS Chat application and have their ST Connect client set up to receive Chats

Customer Experience (Continued)

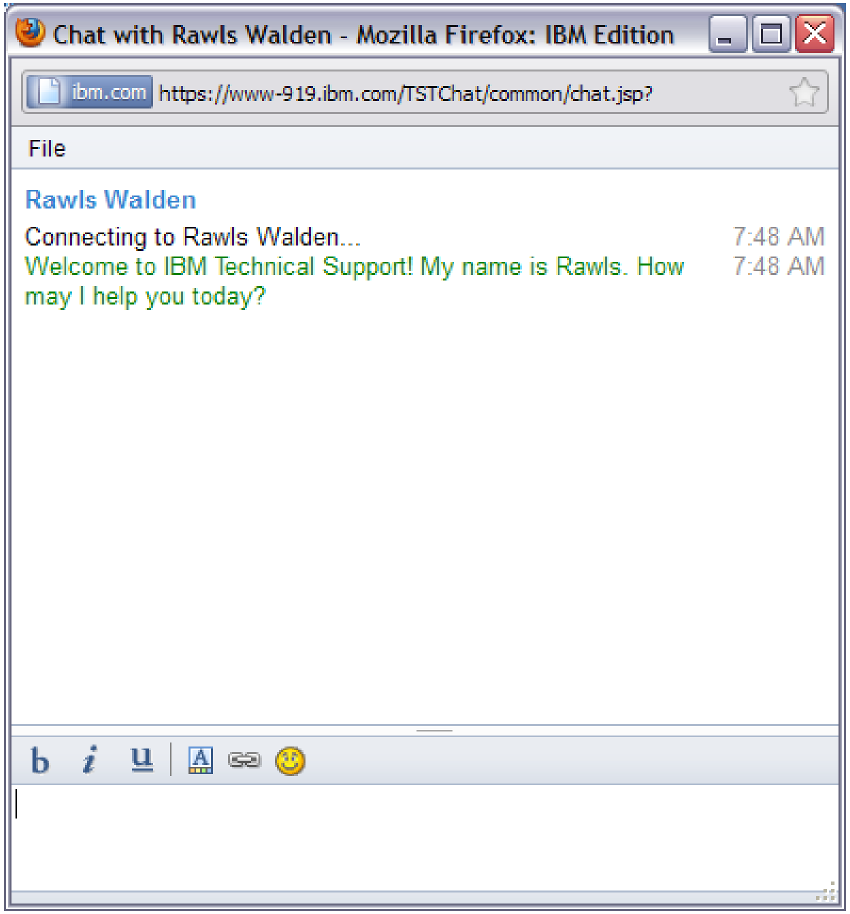
- Customer clicks on the AVL/ AVS name:

- Customer completes and submits form.



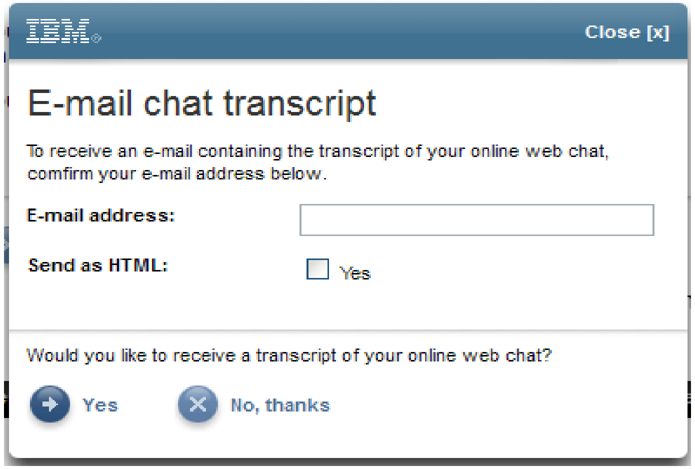
Customer Experience (Continued)

- As soon as the AVL/AVS accepts the request, the chat window displays.

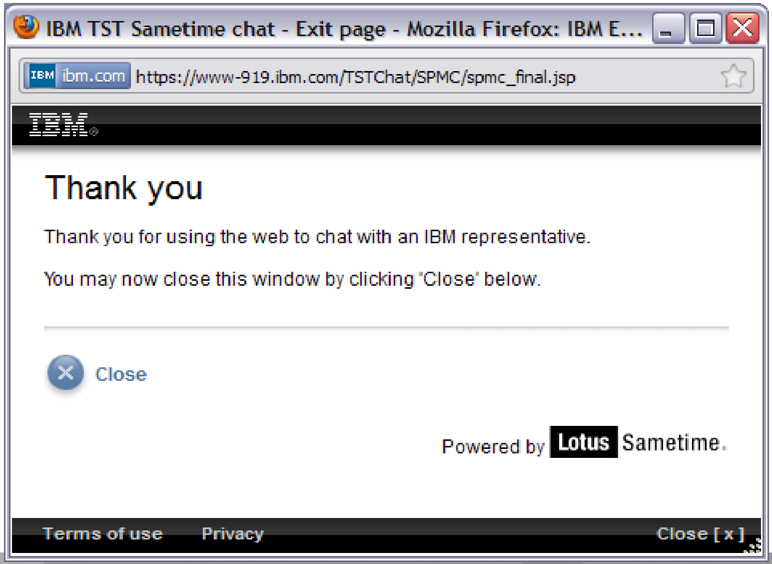


Customer Experience (Continued)

- After closing the chat window, the customer may choose to have the chat transcript sent to themselves.

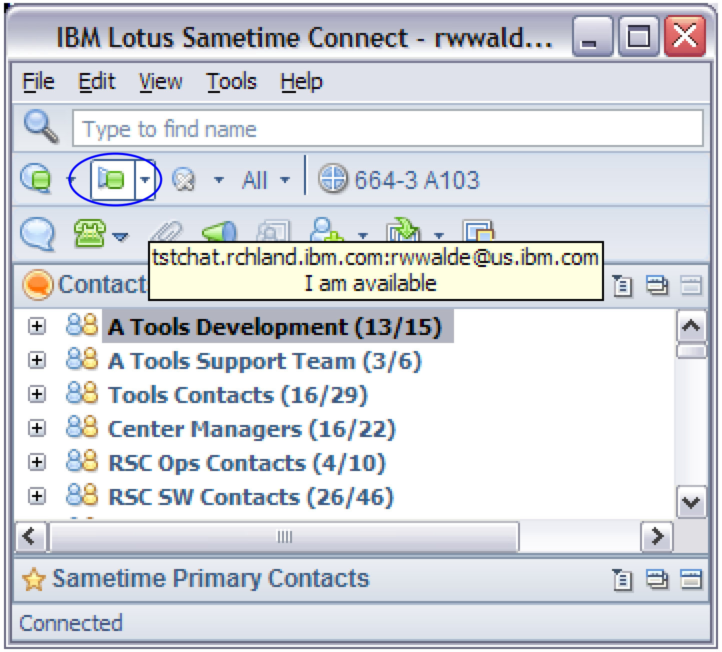


- The flow then continues to a "Thank you" page.



IBM Experience

- The AVL/AVS Contact needs to manually set their status to “I Am Available” in the Technical Support Community



Weekly Brown Bag Sessions

- Brown Bag – generally a training or information session scheduled during a lunch break. (Brown Bag is a symbol for meals brought along by the attendees, or provided by the host. In the US, those are often packed in brown paper bags.)

- Aim is to use these sessions to provide information to the attendees in a voluntary and informal setting for knowledge management and internal communication.

- Sessions begin in September for optional attendance.

Questions