



Best Practices for Standard Customer Smart Account Structure

Intended Audience:

For Internal and External Audiences

December 2017

Best Practices for Standard Customer Smart Account Structure

Small or Medium Business Company

Operating in one Country or State, with Local Presence

Company Type: Small or Medium Business Company operating in one Country or State, local presence.

Company Information/ Structure: 1 office location

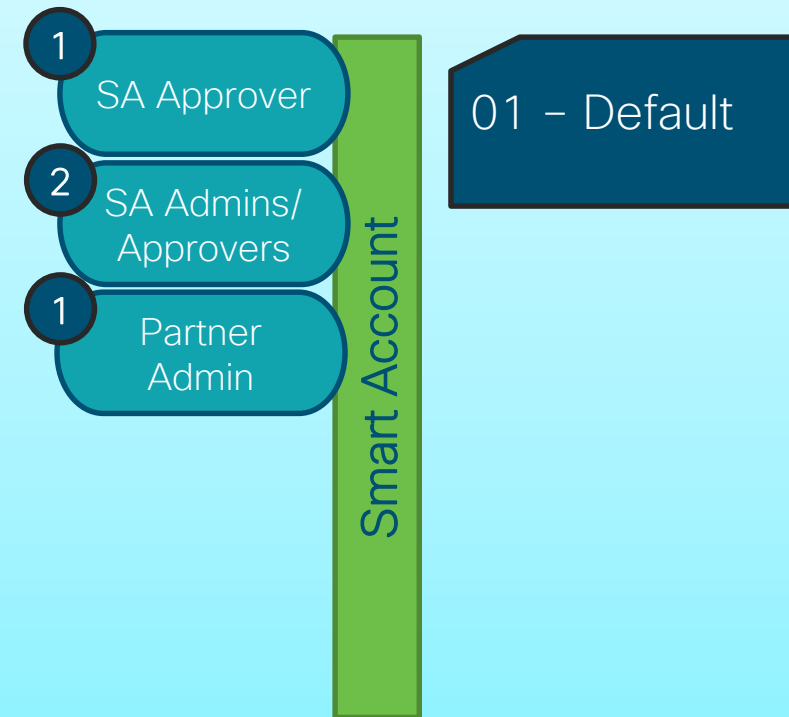
Number of Smart Accounts: 1 Customer Smart Account

Number of Virtual Accounts: 1 Virtual Account (Default)

Structure of Virtual Accounts: N/A

Number of Users/ Admins:

- 1 Smart Account Approver
- 2 Smart Account Administrators and Approvers
- Delegate Smart Account access to 1 Partner Admin of choice



Global or Regional Enterprise Company

Global or Regional Presence

Company Type: Regional Enterprise Company

Typical enterprise operating at a global or regional level.

Company Information/ Structure: 20+ locations (offices, production sites or logistic/ distribution sites).

Global presence (e.g. Americas, Europe, Asia), or Regional presence (e.g. Europe or US).

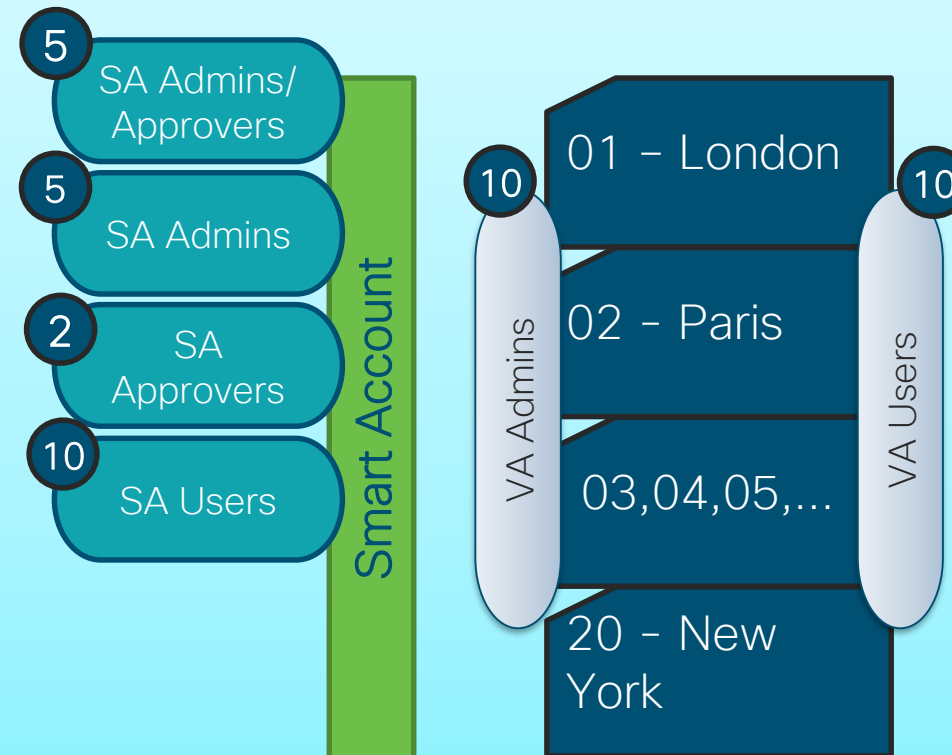
Number of Smart Accounts: 1 Customer Smart Account

Number of Virtual Accounts: 20-60 VAs

Structure of Virtual Accounts: by Location (City, Country)

Number of Users/ Admins:

- 2-5 Account Admins and Approvers, 2-5 Admins,
- 1-2 Approvers
- 5-10 Account Users
- 5-10 Virtual Account Admins, 5-10 Virtual Account Users



Service Provider

Global or Regional Presence

Company Type: Service Provider operating at a global or regional level, providing Internet, Phone and TV services.

Company Information/ Structure: company operating at a global or regional level. Offices in multiple locations.

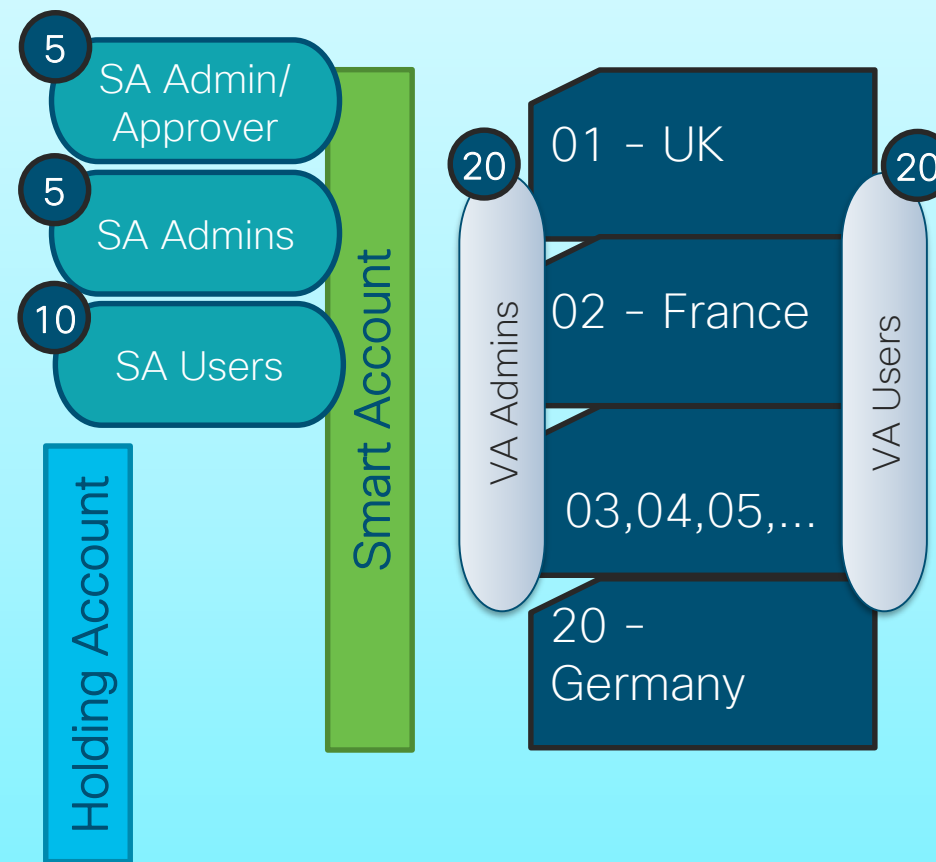
Number of Smart Accounts: 1 Customer Smart Account, 1 Partner Holding Account (only necessary if operating as Reseller).

Number of Virtual Accounts: 20-100 VAs

Structure of Virtual Accounts: by Country, City, Metropolitan Area, Department, Business Line, other organizational unit.

Number of Users/ Admins:

- 2-5 Account Admin and Approver,
- 2-5 Account Admins, 2-10 Account Users,
- 10-20 Virtual Account Admins
- 10-20 Virtual Account Users



Regional IT Services Company

Regional Presence

Company Type: Global or Regional IT Services Company

Company Information/ Structure: 1-5 offices in a specific Region (e.g. North America or Europe)

Number of Smart Accounts: 1 Customer Smart Account, 1 Partner Holding Account (only if operating as Reseller)

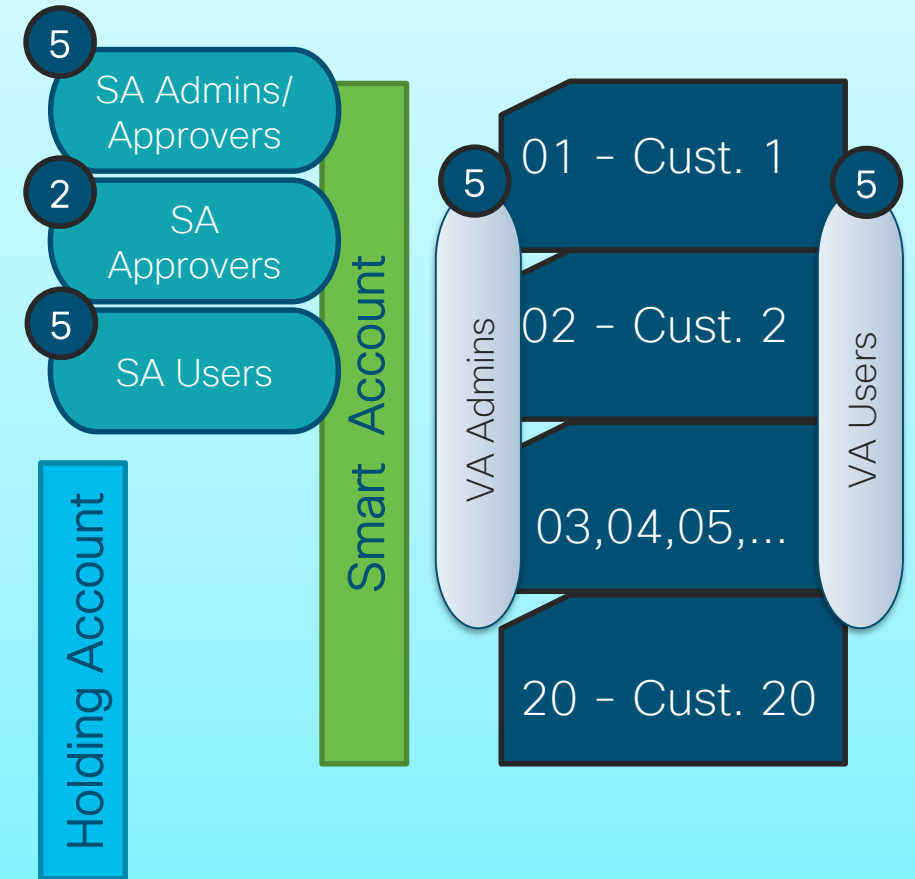
Number of Virtual Accounts: 20-25 VAs

Structure of Virtual Accounts:

by End Customer Company, or by location (City, Metropolitan Area).

Number of Users/ Admins:

- 2-5 Account Admins and Approvers
- 1-2 SA Approvers
- 2-5 Account Users,
- 2-5 Virtual Account Admins
- 2-5 Virtual Account Users



Cloud Services Company

Global or Regional Presence

Company Type: Cloud Services Company

Company Information/ Structure: 5+ global (or regional) locations (ex. in the Americas and/or in Europe).

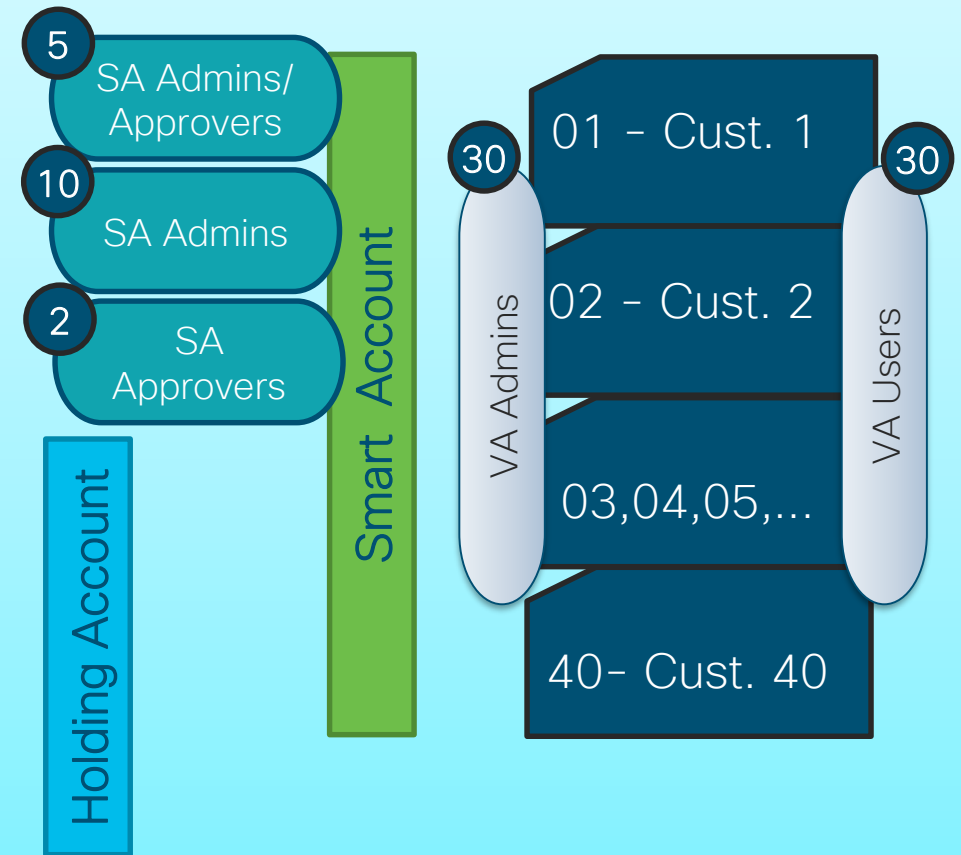
Number of Smart Accounts: 1 Customer Smart Account, 1 Partner Holding Account (only if operating as Reseller)

Number of Virtual Accounts: 40-80 VAs

Structure of Virtual Accounts: by End Customer Company

Number of Users/ Admins:

- 2-5 Account Admins and Approvers
- 2 Account Approvers
- 2-10 Account Admins
- 20-30 Virtual Account Admins
- 20-30 Virtual Account Users



Public Sector: Regional / National Department of IT

Region, State, Country

Company Type: Public Sector – Regional Department of IT

Company Information/ Structure: Regional or National Department of Information Technology

Number of Smart Accounts: 1 Customer Smart Account

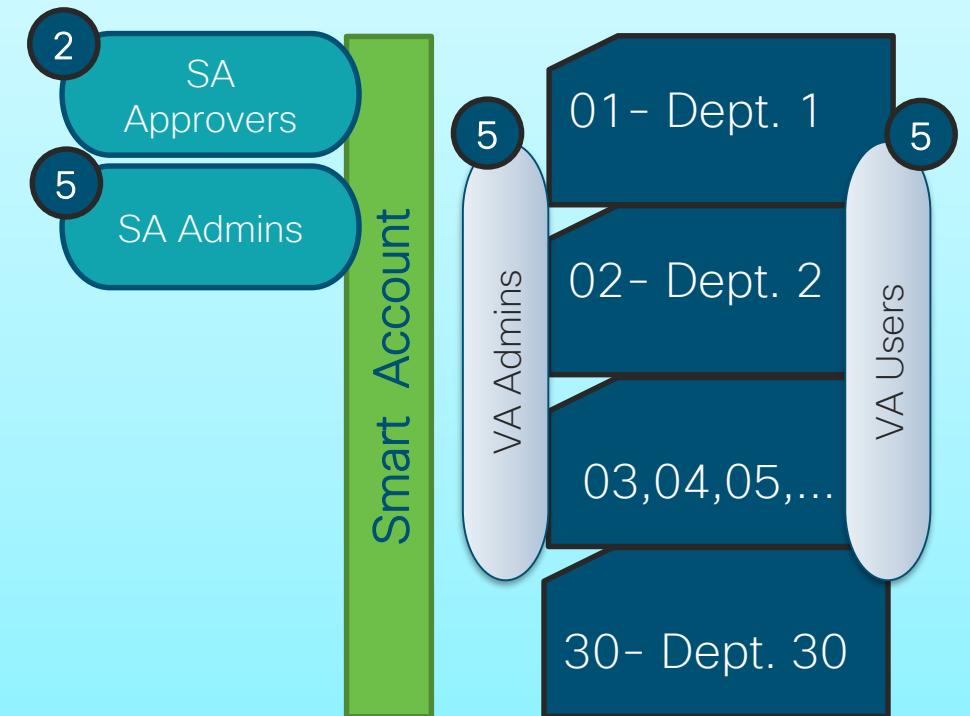
Number of Virtual Accounts: 20-30 VAs

Structure of Virtual Accounts:

by Department (of Commerce, of Environment, of Education, of Transportation, etc.)

Number of Users/ Admins:

- 2 Account Approvers
- 5 Account Admins
- 2-5 Virtual Account Admins
- 2-5 Virtual Account Users



Public Sector – Military

Region, State, Country

Company Type: Public Sector – Military

Company Information/ Structure: Military

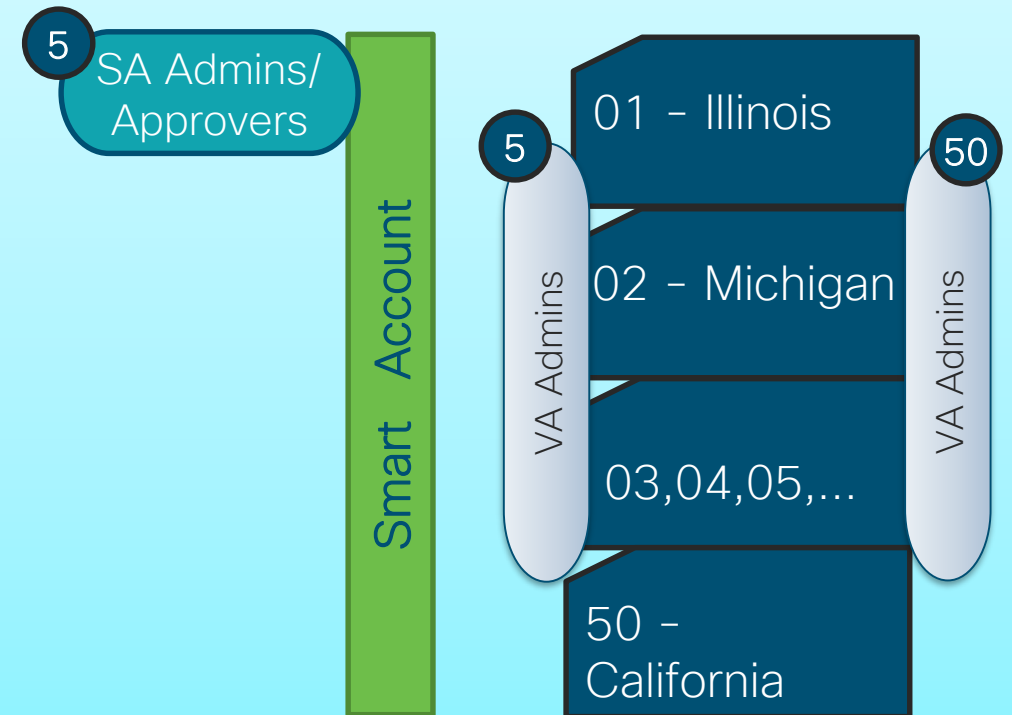
Number of Smart Accounts: 1 Customer Smart Account

Number of Virtual Accounts: 50-100 VAs

Structure of Virtual Accounts: by State, Region or City

Number of Users/ Admins:

- 2-5 Account Admins and Approvers
- 2-5 Virtual Account Admins
- 20-50 Virtual Account Users



Global Business Process Services

Global Presence

Company Type: Global Leader in Business Process Services

Company Information/ Structure: Global leader for business process outsourcing services.
10+ locations (10+ countries) and delivery centers.

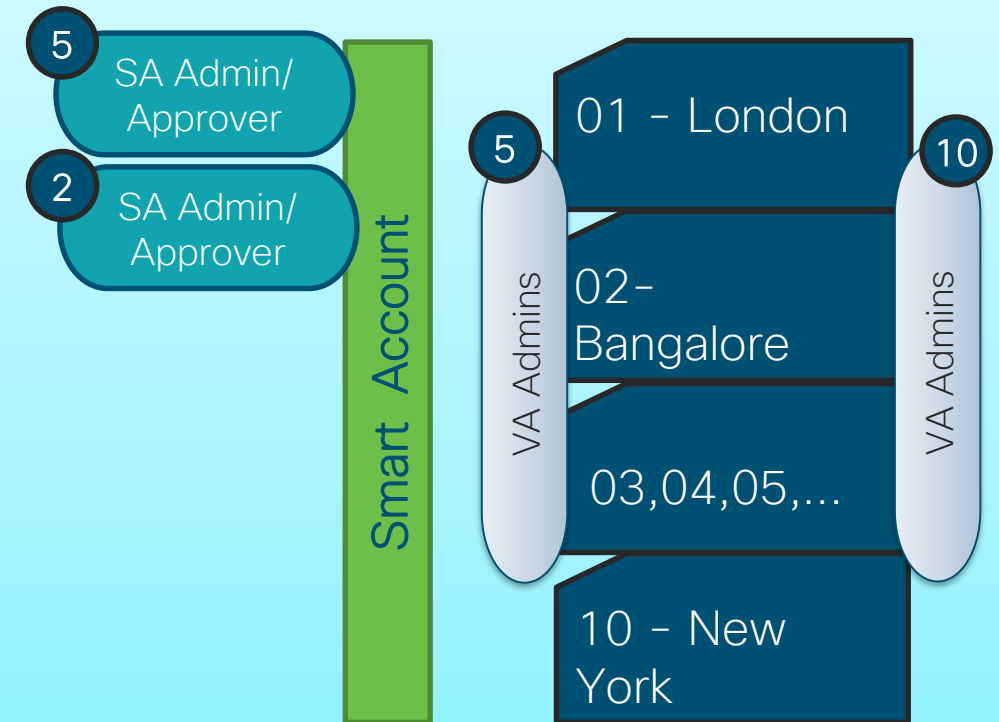
Number of Smart Accounts: 1 Customer Smart Account

Number of Virtual Accounts: 10-50

Structure of Virtual Accounts: by City, globally (cities in the US, Mexico, LATAM, India, Europe).

Number of Users/ Admins:

- 2-5 Account Admins and Approvers
- 2 Account Approvers
- 5-10 Virtual Account Admins
- 5-10 Virtual Account Users



Smart Account Decision Tree - Survey



Check the Smart Account Decision Tree [online survey](#)

This short survey provides Leading Practices and Recommendations for Partners and Customers on how to organize their Smart Account.

Smart Account Roles

Smart Account Roles

CCW Order View management incorporated automatically for applicable Holding Accounts.

Smart Account Approver	Smart Account Administrator	Virtual Account Administrator
Can only approve Smart Account legal agreements on behalf of the Account Owner. Includes no User or Administrator privileges.	Manages all aspects of the Smart Account and its Virtual Accounts. The Smart Account Administrator can view and manage license inventory for the entire Smart Account, and also perform Account management activities.	Similar to the Smart Account Administrator, but limited to selected Virtual Accounts. Can perform license management activities and also User management for selected Virtual Accounts.

Smart Account User	Virtual Account User
Similar to a Smart Account Admin, this role allows access to all Virtual Accounts. A Smart Account User can perform licensing activities, but cannot create new Virtual Accounts or perform User management activities.	Similar to a Smart Account User, but is limited to the Virtual Account the User is assigned to – they can perform license management activities, but cannot add new users to their assigned Virtual Account.

How Partner and Customer Internal Roles
can be mapped to Smart Account Roles

Partner Holding Account – Roles

Access to Holding Account and Partner Roles Involved

- 1 The access to the Partner Holding Account provides the following options:
 - Visibility to the orders assigned to a Partner Holding Account in Cisco Commerce.
 - Ability to re-assign the license on the order from the Partner Holding Account to the Customer Smart Account.
 - Option to set up email notification settings: receive an email when orders are provisioned to the Holding Account.
- 2 Examples of Partner Roles that should have access to the Partner Holding Account:

Partner Role	Partner Function	Smart Account Role* (Global Role)	Virtual Account Role* (Local/ Dept. Role**)
Post-Sales Specialist	Anyone who is reassigning an order from a Partner Holding Account to an End Customer's Smart Account.	Smart Account User	Virtual Account User
Purchasing Team Manager	Person managing the Purchasing Team.	Smart Account Admin	Virtual Account Admin
IT Admin Specialist	Person managing the IT Administration	Smart Account Admin	Virtual Account Admin

*A Smart Account Admin or User has access to the entire Smart Account, while a Virtual Account Admin or User has access only to selected Virtual Account(s).

**Local/Department Role: the Partner may want separate Virtual Accounts by Organizational Unit * (ex. business line, product family, department, region, country, etc.) to allow separate access/ visibility to different purchasing departments and post-sales departments.

Customer Smart Account – Roles

Access to Customer Smart Account and Customer Roles Involved

- 1 The access to the Customer Smart Account provides the following options:
 - License Management in SSM, LRP, EA Workspace (for Users and Admins)
 - Smart Account Administration: Users, Virtual Accounts, Agreements (for Admins)
- 2 Examples of Customer Roles that should have access to the Customer Smart Account:

Customer Role	Customer Function	Smart Account Role* (Global Role)	Virtual Account Role* (Local/Dept. Role)**
License Management Specialist	Person managing licenses in SSM, LRP and EA Workspace.	Smart Account User	Virtual Account User
License Management Supervisor	a) Person managing the Smart Account: accepting the Smart Licensing Agreement, adding/deleting Users, adding/deleting Virtual Accounts. b) Person supervising the team of License Management Specialists and/or managing licenses in SSM, LRP and EA Workspace.	Smart Account Admin	Virtual Account Admin
Systems Engineer	Person who configures (registers) products in SSM.	Smart Account User	Virtual Account User
Purchasing Specialist or Manager	Person purchasing licenses from Cisco or the Partner. May need to verify that the licenses purchased are available in the Smart Account. May need to check if there are license shortages and purchase more licenses if needed.	Smart Account User	Virtual Account User
Legal Department Specialist or Manager	Person from the legal department in charge of accepting the Smart Licensing Agreement. This role can also edit account properties. No access to SSM, EA Workspace, LRP.	Smart Account Approver	N/A
IT Admin Specialist	Person managing the IT Administration	Smart Account Admin	Virtual Account Admin

*A Smart Account Admin or User has access to the entire Smart Account, while a Virtual Account Admin or User has access only to selected Virtual Account(s).

**Local/Department Role: the Customer may want separate Virtual Accounts to segment licenses by Organizational Unit * (ex. business line, product family, department, region, country, etc.) and/or to allow separate access control to different sets of licenses.

