



Smart Account on Quote

Mandatory Smart Account assignment in CCW

Quote/Deals

For Partners and Distributors

Avoid lost and undelivered licenses



This plan has been modified

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When it comes to Licensing Cases, the #1 spot is held by the question “**Where is my license?**” In most scenarios, end customers have no Smart Account assigned, impacting their asset visibility, activation, adoption, and value motions.

Inconsistency and a lack of enforcement in Smart Account Assignment across partners and distributors, causes **up to 20%** of licenses to age in holding accounts, leading to a sub-optimal license delivery.

Cisco initiated a policy on September 13 that requires identification or initiation of Smart Account (SA) assignment for Deals/Quotes, as a means to improve license delivery and velocity for our customers. Before this change, inconsistency and a lack of enforcement in Smart Account Assignment across partners and distributors caused up to 20% of licenses to age in holding accounts, leading to sub-optimal license delivery.

Policy enforcement was originally scheduled for October 25, but additional time was provided to prepare for system adjustments, based on feedback from partners and distributors. The policy is currently being monitored without impact to the Deal/Quote flow.

January 4 will mark the revised implementation date, and the scope of this change has been modified. Beginning January 4, 2021, only RNSD Transactional Deals require a Smart Account to be assigned before you can submit the quote.

*Japan is excluded from this change.

Increase ordering process and license delivery

Smart Account assignment ensures accurate delivery of licenses and reduces the risk of loss and possible customer escalations. It will also help eliminate administrative overhead of Partner Holding Accounts by accelerating order processing and license velocity to make sure licenses can be consumed when needed.

To increase your customer’s asset visibility of license ownership and consumption, this process is key.

Get ready for change

This process change is being implemented based on best practices from those who routinely assign licenses early in the process and which have proven to lessen delivery related issues. By following the new procedure, you will lower administrative overhead, reduce customer escalations, and ensure timely delivery and accurate visibility to end customers.

As we will be implementing changes that affect Smart Accounts and Holding Accounts, keep in mind that you **will not be able** to submit the deal or quote if you skip the mandatory smart account assignment.

Look for updates in coming Readiness Review issues, including content to support your readiness. We will provide a Quick Reference Guide with scenarios of impact from this change, best practice actions for partner users, and responses to [Frequently Asked Questions](#). Also, our training content will be updated to include the new process and our trainers will highlight the changes in upcoming sessions.

New Smart Account Creation can be accessed directly through the CCW User Interface and it can still be delegated through order processing given that it will not block Quote, Deal / Order Smart Account creation. Cisco will still assist with **re-assignment** in case an incorrect Smart Account was selected.

Look for additional resources to support you on our [SalesConnect Hub](#).

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