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Featured Application

Excellence in Customer Success Technology Deployment

Overview

CDW's Cisco Customer Success (CS) team was established in 2018 to focus on the lifecycle of Cisco Enterprise Agreements (EAs). By 2022, it was evident that the administrative requirements placed on Customer Success Managers (CSMs) was impeding their ability to serve an expanding customer base. CDW began an exploration of Customer Success Platforms (CSP) that could be tailored to CDW's specific requirements. CDW selected Gainsight.



Implementation and Scaling

There were two primary challenges facing the CS team that CDW was looking to solve with a platform. First was the vast scale of CDW's customer base. CDW has over 250,000 customers and 45,000 Cisco Customers. Second, and perhaps the issue that loomed largest, was the disparate nature of the data the CS team uses. Relevant data for CDW's customers resides in multiple locations, including partner APIs, ServiceNow, and an in-house tool designed for sales order processing. There was nothing for CS and certainly nowhere for CDW coworkers to view the information in one centralized location. These issues led to manual, inefficient processes hindering the desired proactive engagement of CSMs with customers, as well as poor communication between team members. CDW required a unified platform to standardize on best practices and maximize efficiencies.

In December 2022, CDW implemented Gainsight. Originally launched with Cisco CS US, additional internal teams have also come online - Cisco CS Canada, Aggregation Services, Managed Services, and in 2025, VMware CS and IBM CS. Multiple CDW entities can now seamlessly access consolidated account information within a unified framework.

96% Increase in Gainsight Power Users



In 2025, CDW user count has risen to almost 200 and CSMs are servicing over 1500 "Calls to Action" (CTAs) with customers. In addition, CSAT Surveys focused on onboarding and adoption have been launched, renewal rate tracking has been enabled, CTAs have expanded to cover additional "moments that matter", and third-party APIs are being leveraged to facilitate data flow in and out of the platform.

Business & Customer Impact

Gainsight is the platform that drives operational efficiency and serves as a core business enabler. By embedding Gainsight into workflows, measurable business impacts are evident, including an increase in gross margin and a higher propensity for CS-managed customers to invest in CDW-delivered services. This has led to growth in the volume of Cisco Enterprise Agreements (EAs), increased revenue retention, and a rise in total contract value (TCV) through both renewals and upsell opportunities.

29% Increase in Productivity Since Launching Gainsight



While there are several key features that have been instrumental in driving CDW's success with Gainsight, three stand out.

1. Automated Calls to Action (CTAs)

Seven automated CTAs have been implemented, each playing a crucial role in streamlining CS operations. A notable example involves the data validation process required 90 days before contract anniversaries. Previously, this task placed a significant administrative burden on CSMs, detracting from core responsibilities. Leveraging Gainsight, this bottleneck was strategically

203 Average CTAs per CSM per quarter



reassigned to Customer Success Administrators (CSAs), who focus on administrative tasks to serve customers. This change, enabled through automated CTAs, enables CDW to initiate renewal and True-Forward processes earlier in the lifecycle. True-Forwards are essential to evaluate a customer's growth against entitlements to then react and adjust contracts on a go-forward basis without

retroactive charges. As a result, milestone tracking has improved, earlier visibility into customer progress is available, and the link between customer success activities and financial outcomes is clear.

2. AI Cheatsheet

The AI Cheatsheet widget has significantly enhanced internal collaboration and efficiency. By generating narrative summaries based on the past six months of timeline entries – including key customer metrics, strategic priorities, risks, renewals, and executive changes – this function provides a CSM with a concise, yet comprehensive overview. These summaries can easily be shared with relevant stakeholders, such as account managers (inside sales), via email. Using AI Cheatsheet to prepare for customer meetings can save CSMs 5 hours per week. This functionality not only saves time but also ensures that all team members are aligned with the latest customer developments, empowering CSMs to engage in more informed and strategic conversations.

36% YOY EA Growth



3. Renewal Center

The Renewal Center has significantly improved the ability to manage, forecast, and act on renewal opportunities across the business. It serves as a centralized hub for all renewal-related activities, offering easy-to-update views of upcoming renewals by stage – including if pre-renewal collaboration with sales is in progress, if a quote/proposal is being created, or if the proposal is pending customer approval. Prior to implementing Renewal Center, CSMs were manually forecasting each renewal, increasing

the risk of missing early warning signs of churn and limiting the time available to apply effective retention strategies. Renewal Center empowers CSMs to analyze key retention metrics by segmentation as well as identify and act on risks and upsell opportunities earlier in the renewal cycle. The Renewal Center is a CSMs one-stop shop for forecasting and has elevated CDW's renewal motions from manual to proactive, data-driven, and scalable.

115% Net Renewal Rate



Optimized workflows and enhanced reportability have further empowered the business with actionable insights, reinforcing CS as a strategic driver of growth. The features enabled through Gainsight have ensured timely, personalized engagements that resonate with customers, ultimately driving increased satisfaction and loyalty. This impact is clearly reflected in Net Promoter Scores (NPS) and Customer Satisfaction (CSAT) Surveys. NPS is a measure of customer loyalty by looking at the likelihood of them recommending CDW and is calculated by subtracting the percentage of detractors from the percentage of promoters. A score above 20 is favorable, while above 50 is excellent. CSAT surveys indicate how satisfied customers are with CDW CSMs and the service they provide. Customer feedback consistently highlights the CS team's deep knowledge, responsiveness, and clear communication as key contributors to this positive sentiment. CDW's results underscore the effectiveness of the CS strategy – not only in operational execution, but in building trusted, value-driven relationships with customers. These innovations demonstrate how technology, when paired with a customer-first mindset, can elevate CS from a support function to a core growth enabler within the business.

Looking Forward

With Gainsight, CDW is focused on optimizing customer value realization and driving consistent success. By transforming customer data into actionable insights, CDW has improved customer satisfaction, secured renewals, and empowered teams to deliver exceptional experiences.

Gainsight's unified platform accelerates onboarding and adoption, strengthening relationships across the customer journey. CDW's success is rooted in a strong partnership with Gainsight, and CDW is pushing to contribute through design reviews, product testing, and shared data insights. Recently, CDW launched a digital success campaign for low-touch customers with net new subscriptions, enabling proactive, scalable support without requiring a dedicated CSM. Insights from this initiative will inform future digital strategies. Looking ahead, CDW is focused on AI, machine learning, and industry-specific solutions to boost predictive analytics and proactively address customer needs. With the upcoming rollouts of new features, CDW aims to streamline workflows, automate customer communications and manual tasks, and ultimately free up CSMs to focus on strategic activities.



NPS Scores YTD

Configuration Services: 84.6

Managed Services: 55.6

Professional Services: 63.8



CSAT Results

Onboarding – 95.3%

Adoption – 88.2%



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