

# Customer Service Management (CSM) Implementation

## 1: Implementing Customer Service Operations

- **Objectives**
- Check knowledge of CSM Basics
- Learn how to configure communication channels and agent workspace
- Learn when and why to use case types
- Investigate assignment workbench and advanced work assignment
- Introduce guided decisions and outsourced customer service
- Introduce predictive intelligence
- **Labs**
- Class preparation
- Inbound email flows
- Case types
- CSM agent workspace
- Case skill determination
- Advanced work assignment for CSM
- Outsourced customer service

## 2: Implementing Customer Experience

- **Objectives**
- Configure the customer portals
- Investigate knowledge management
- Introduce walk-up experience for customer service
- Learn how field service management interactions with CSM
- **Labs**
- CSM Portal Page
- Portal Case Creation
- CSM Knowledge Base Management
- Knowledge-centered service for CSM

### **3: Implementation Preparation Best Practices**

- **Objectives**
- Introduce Now Create
- Explore implementation basics and recognize the importance of Organizational Change Management (OCM)
- Discuss workshop strategy, requirements gathering, and implementation best practices including integrations and data migration
- **Labs**
- Auto-Close Resolved Cases

### **4: Implementing Performance Management**

- **Objectives**
- Performance best practices and reporting
- Learn how to use performance analytics to manage CSM
- CSM reporting
- Improving knowledge performance through search analysis
- **Labs**
- In-Form Analytics Dashboard