

ServiceNow Customer Service Management (CSM) Fundamentals

Module 1: Customer Service Management Principles

Objectives

- Introduction to ServiceNow's Customer Service Management Solution
- Learn how to position Customer Service Management across workflows on the Now Platform
- Explore the similarities and differences between CSM and IT Service Management (ITSM)
- Discuss why customization of ITSM to meet CSM needs is not a recommended best practice approach

Labs

- Class preparation

Module 2: CSM Basics

Objectives

- Get familiar with customer service terminology
- Learn the difference between B2B and B2C, and how each is managed via CSM
- Be able to describe the various aspects of a customer portfolio and a product portfolio
- Gain hands-on experience configuring core data and supporting reference data

Labs

- Working with consumers
- Accounts, contracts and hierarchies
- Partners, contracts, and account relationships
- Service-aware install base and the common service data model (CSDM)
- Service contracts and entitlements
- Customer service groups and skills
- Account teams and responsibility definitions

Module 3: Case Management

Objectives

- Learn about the various communication channels and case management
- Introduce matching rules and assignment rules
- Explore and configure the CSM agent workspace
- Introduce and explore major case management
- Explore CSM with service management integration
- Introduce the mobile experience for CSM
- Learn why tracking and analyzing data is important for CSM

Labs

- Configure case process
- CSM agent workspace
- Advanced work assignment
- Case and account escalation
- Major issue management
- CSM with ITSM

Module 4: Customer Experience

Objectives

- Learn about the portals for B2B and B2C
- Learn how the portals interact with Service Catalog
- Introduction to Community
- Learn how CSM interacts with the Knowledge Portal
- Gain hands-on experience with the customer service portal and the consumer service portal

Labs

- Customer service portal: Case creation and asset contact
- Customer service portal: Contract administration
- Customer service portal: Self-registration