

ServiceNow: Customer Service Management (CSM) Implementation

24 Hours

Course Description

The Customer Service Management (CSM) Implementation course is designed to equip individuals with the knowledge and skills needed to implement and manage effective customer service operations using the CSM platform. This comprehensive training program is divided into four key modules, each focusing on different aspects of CSM implementation, with practical labs to reinforce learning.

Audience

This course is intended for professionals, IT administrators, and business leaders responsible for enhancing customer service operations within their organizations. It is suitable for individuals seeking to leverage the capabilities of the CSM platform to improve customer experiences and streamline service processes.

Pre-requisite Knowledge/Skills

To ensure a solid foundation for this course, participants are required to have completed the following mandatory prerequisites:

- **ServiceNow Administration Fundamentals**: This foundational course provides essential knowledge of ServiceNow's administration, ensuring that participants have a strong understanding of the platform's core features.
- **Customer Service Management (CSM) Fundamentals**: Understanding the basics of CSM is crucial for this course, as it builds upon the fundamental concepts of customer service management within the ServiceNow ecosystem.
- **ServiceNow Platform Implementation**: Knowledge of how to implement solutions on the ServiceNow platform is essential to fully grasp the CSM implementation process.

Course Objectives

- Gain a comprehensive understanding of Customer Service Management (CSM) principles and concepts.
- Learn how to configure communication channels and agent workspaces effectively within the CSM platform.
- Understand the significance of various case types and when to use them for managing customer service operations.
- Explore the functionalities of assignment workbench and advanced work assignment to optimize task allocation.
- Introduce guided decisions and outsourcing strategies for improved customer service delivery.
- Familiarize yourself with predictive intelligence and how it can be applied to enhance customer service outcomes.

Course Outline

The course comprises 24-hours of theory and labs. It's divided into 4 different modules.

Module 1: Implementing Customer Service Operations

- Understanding CSM Basics
- Configuring Communication Channels and Agent Workspace
- Case Types in CSM
- Assignment Workbench and Advanced Work Assignment
- Guided Decisions and Outsourced Customer Service
- Predictive Intelligence in CSM
- Labs: Class preparation, Inbound email flows, Case types, CSM agent workspace, Case skill determination, Advanced work assignment for CSM, Outsourced customer service

Module 2: Implementing Customer Experience

- Configuring Customer Portals
- Knowledge Management for Service Efficiency
- Walk-up Experience for Customer Service
- Integration with Field Service Management
- Labs: Class preparation, Inbound email flows, Case types, CSM agent workspace, Case skill determination, Advanced work assignment for CSM, Outsourced customer service

Module 3: Implementation Preparation Best Practices

- Introduction to "Now Create"
- Basics of CSM Implementation
- Organizational Change Management (OCM)
- Workshop Strategy and Requirements Gathering
- Best Practices for Integrations and Data Migration
- Labs: Auto-Close Resolved Cases

Module 4: Implementing Performance Management

- Performance Management Best Practices
- Using Performance Analytics in CSM
- CSM Reporting
- Enhancing Knowledge Performance through Search Analysis

- Labs: In-Form Analytics Dashboard