

ServiceNow: Customer Service Management (CSM) Fundamentals

16 Hours

Course Description

The "Customer Service Management Principles and Capabilities" course is designed to equip participants with the essential knowledge and skills needed to excel in the field of customer service management. This comprehensive course covers a wide range of topics, from understanding customer service foundations to advanced capabilities in customer service management. It is tailored for professionals looking to enhance their expertise in managing customer relationships, service processes, and customer service portals effectively.

Audience

This course is ideal for professionals, managers, and individuals seeking to enhance their understanding of customer service management principles and capabilities. It is suitable for:

- Customer service managers and supervisors
- Customer support agents and representatives
- Service desk professionals
- IT service management professionals
- Business analysts involved in customer service processes.
- Anyone looking to develop a strong foundation in customer service management.

Pre-requisite Knowledge/Skills

Mandatory Prerequisites:

- **Welcome to ServiceNow:** Participants should have a basic understanding of the ServiceNow platform.
- **ServiceNow Administration Fundamentals:** A foundational understanding of ServiceNow administration is required.
- **ServiceNow Platform Implementation:** Knowledge of how to implement solutions on the ServiceNow platform is essential to fully grasp the CSM implementation process.

Recommended Prerequisites:

ITIL v3 or ITIL 4 Foundation Certification: A background in ITIL concepts and frameworks is recommended to enhance the understanding of service management principles.

Course Objectives

Gain a deep understanding of customer service management principles and their significance in today's business landscape.

- Learn how to integrate customer service processes effectively within an organization, ensuring seamless customer interactions.
- Develop expertise in managing customer portfolios, including B2C and B2B customers.
- Master asset management, CMDB, and service-aware install base principles.
- Comprehend the key aspects of service contracts and entitlements.
- Understand organizational structures and case management basics.
- Become proficient in configuring customer service portals for optimal customer experience.
- Explore the functionalities that assist customer service agents in providing superior support.
- Familiarize themselves with major issue management and tracking and analysis in customer service.
- Gain insights into advanced customer service management capabilities.

Course Outline

The course comprises 16 hours of theory and labs. It's divided into 11 different modules.

Module 1: Course Introduction

- Instance Help
- Customer Service Management Principles

Module 2: Customer Service Management Foundation

- Lab 01 - Class Preparation

Module 3: Customer Portfolio Management

- Customer Portfolio: Business to Consumer (B2C)
- Lab 02 - Consumers
- Customer Portfolio: Business to Business (B2B)
- Lab 03 - Accounts, Contacts, and Hierarchies
- Lab 04 - Partners, Contacts, and Account Relationships

Module 4: Product Portfolio and Asset Management

- Lab 05 - Asset Management - Products and Assets
- Asset Management and CMDB
- Lab 06 - Asset Management and CMDB

- Lab 07 - Asset Management - Services and Bundles
- Lab 08 - Service-aware Install Base

Module 5: Business Models and Portfolios

- Wrap Up for Business Models and Portfolios

Module 6: Service Contract and Entitlements

- Organizational Structure and Case - Basic Principles

Module 7: Organizational Structure

- Lab 10 - Customer Service Groups and Skills
- Lab 11 - Account Teams and Responsibility Definitions

Module 8: Case Management

- Case — Basic Principles
- Lab 12 - Configure Case Process

Module 9: Customer Experience

- Customer Service Portals
- Lab 13 - Customer Service Portal - Contact Administration
- Lab 14 - Customer Service Portal - Self-Registration
- Lab 15 - Consumer Service Portal - Self-Registration
- Lab 16 - Consumer Service Portal - Product Registration
- Customer Service Portals Commonalities and Capabilities
- Lab 17 - Customer Service Portal - Partners
- Lab 18 - Customer Service Portals Commonalities
- Lab 19 - Targeted Communications

Module 10: Agent Experience

- Beneficial and Practical Functions to Assist Agents
- Introduction to Virtual Agent
- CSM Workspace Experience
- Lab 20 - CSM Configurable Workspace
- Lab 21 - Customer Service Management with ITSM

- Case Routing and Assignment
- Lab 22 - Advanced Work Assignment
- Case and Account Escalation
- Lab 23 - Case and Account Escalation
- Major Issue Management
- Lab 24 - Major Issue Management
- Tracking and Analysis

Module 11: Additional Customer Service Management Capabilities

- Appendix A: Customer Service Teams – Knowledge and Skills