

# ServiceNow® Customer Service Management (CSM) Essentials

---

## Course Description:

This course is designed to equip participants with a comprehensive understanding of the ServiceNow® Customer Service Management (CSM) product. Through a blend of instructional content and hands-on labs, attendees will learn to configure, administer, and manage CSM features and functions, mastering best practices for implementing the product. This course is ideal for those looking to support or advise on CSM implementations, ensuring smooth resolution of customer issues through effective case management and optimized workflows.

---

## Audience Profile:

This course is intended for:

- **Customer Service Management Administrators / ServiceNow System Administrators** – responsible for administering CSM applications.
  - **Technical / Solution Consultants and Architects** – focused on configuring, developing, or supporting the CSM product.
  - **Project / Program / Engagement Managers** – leading the implementation of the CSM product.
- 

## Prerequisite:

- Fundamental understanding of ServiceNow platform features and functions.
  - Basic experience with service management or customer support processes.
- 

## Course Objective:

By the end of this course, attendees will be able to:

- Understand the features, benefits, and architecture of the ServiceNow® Customer Service Management product.
- Define key customer service concepts, including Interaction and Case Management lifecycles.
- Administer and manage customer data like Accounts, Contacts, Contracts, and Install Base items.
- Resolve customer issues using Cases, Escalations, Major Issue Management, and more.

- Configure case types and manage cases through CSM Configurable Workspace.
  - Enhance agent productivity with Advanced Work Assignment (AWA).
  - Use analytics to track the health of customer service processes.
- 

## **Table of Contents:**

---

### **Module 1: Introduction**

- **Section 1.1:** ServiceNow Customer Service Management (CSM)
  - **Section 1.2:** Technical Implementation Considerations
  - **Labs and Activities**
- 

### **Module 2: Customers**

- **Section 2.1:** Business Models
  - **Section 2.2:** B2C
    - Labs and Activities
    - Lab Demo: Consumers
    - Lab Demo: Households
  - **Section 2.3:** B2B
    - Labs and Activities
    - Lab Demo: Customer Accounts and Contacts
  - **Section 2.4:** B2B2C and B2B2E
    - Labs and Activities
    - Lab Demo: Account Consumers
  - **Section 2.5:** Portal Good Practices
- 

### **Module 3: Interaction**

- **Section 3.1:** Live Agent and Virtual Agent
- **Section 3.2:** Interaction Management
  - Labs and Activities

- Lab Demo: Lookup and Verify
  - **Section 3.3:** Routing and Assignment
  - **Section 3.4:** Agent Chat
    - Labs and Activities
    - Lab Demo: Agent Chat
- 

## **Module 4: Products and Services**

- **Section 4.1:** Product Model Management
    - Labs and Activities
    - Lab Demo: Product Models
  - **Section 4.2:** Install Base Management
    - Labs and Activities
    - Lab Demo: Sold Products and Install Base Items
  - **Section 4.3:** Contracts and Entitlements
    - Labs and Activities
    - Lab Demo: Contracts and Entitlements
- 

## **Module 5: Case**

- **Section 5.1:** Case Overview
    - Labs and Activities
    - Lab Demo: State Flows
    - Lab Demo: Service Level Agreements
    - Lab Demo: Special Handling Notes
  - **Section 5.2:** CSM Workspace Navigation
  - **Section 5.3:** Case Types
    - Labs and Activities
    - Lab Demo: Case Types
- 

## **Module 6: Case Initiation**

- **Section 6.1:** Case Routing and Assignment
    - Labs and Activities
    - Lab Demo: Advanced Work Assignment (AWA) for CSM with Skills
  - **Section 6.2:** Case Initiation as an Agent
    - Labs and Activities
    - Lab Demo: Service Definitions
  - **Section 6.3:** Case through Service Catalog
    - Labs and Activities
    - Lab Demo: Case Record Producers
  - **Section 6.4:** Email-to-Case
    - Labs and Activities
    - Lab Demo: Email-to-Case
- 

## **Module 7: Case in Progress**

- **Section 7.1:** Case Tasks
  - **Section 7.2:** Escalations
    - Labs and Activities
    - Lab Demo: Case Escalation
  - **Section 7.3:** Case Summaries
- 

## **Module 8: Case Resolution and Closure**

- **Section 8.1:** Case Resolution and Closure
    - Labs and Activities
    - Lab Demo: Auto-Close Resolved Cases
- 

## **Module 9: Major Case Management**

- **Section 9.1:** Major Case Management
  - Labs and Activities
  - Lab Demo: Major Issue Management

- **Section 9.2:** Targeted Communications
    - Labs and Activities
    - Lab Demo: Targeted Communications
- 

## **Module 10: Metric Strategy**

- **Section 10.1:** Persona-Based Dashboards
  - **Section 10.2:** CSM Dashboard Configuration
    - Labs and Activities
    - Lab Demo: Customer Service Metrics
- 

## **Course Completion:**

- Certified Implementation Specialist – Customer Service Management Voucher Info