

ServiceNow: Field Service Management (FSM) Fundamentals

Course Description

The "Field Service Management (FSM) Fundamentals" course provides a comprehensive introduction to the key principles and processes involved in effective field service management. Field service management is essential for organizations that provide on-site services, such as repairs, installations, maintenance, and more. This course will help you understand the fundamental concepts, tools, and best practices used in the field service industry.

Audience

This course is designed for professionals and individuals who are interested in or already working in the field service management industry. It is suitable for:

- Field Service Managers and Supervisors
- Field Technicians and Service Agents
- Operations Managers
- Service Coordinators and Dispatchers
- Anyone interested in improving their knowledge of field service management

Pre-requisite Knowledge/Skills

No prior knowledge or experience is required to take this course. It is suitable for beginners, as well as those with some background in field service management.

Course Objectives

By the end of this course, participants will:

- Understand the core concepts of Field Service Management.
- Learn about the key roles and personas in FSM.
- Gain insights into the FSM process and workflow.
- Explore the tools and technologies used in FSM.
- Learn about work order initiation, qualification, scheduling, dispatch, delivery, and confirmation processes.
- Analyze and improve field service operations.
- Explore reporting and performance analytics in FSM.
- Experience a hands-on Field Service Management Process Simulator.
- Learn how to request and use a lab instance for practical learning.
- Gain the skills and knowledge necessary to excel in the field service management field.

Course Outline

Module 1: Introduction and Overview

- Welcome to Field Titans!
- Field Service Management Overview
- ServiceNow Field Service Management Infographic

Module 2: Field Service Management Fundamentals

- Field Service Management Personas and Roles
- ServiceNow Field Service Management Process

Module 3: Work Order Initiation

- Work Order Initiation
- Work Order Initiation at Field Titans
- Workflow States
- Work Order Initiation Process

Module 4: Work Order Qualification

- Work Order Qualification
- Work Order Qualification at Field Titans
- Work Order Qualification Process

Module 5: Scheduling and Dispatch

- Scheduling and Dispatch
- Work Order Scheduling and Dispatch at Field Titans
- Scheduling and Dispatch Personas and Key Features
- Scheduling and Team Management
- Scheduling and Dispatch Management

Module 6: Delivery and Confirmation

- Delivery and Confirmation
- Work Order Delivery and Confirmation at Field Titans

- Delivery and Confirmation Personas and Key Features

Module 7: Field Service Agents

- Field Service Agents Infographic

Module 8: Practical Application

- Review and Perform Tasks - Desktop
- Review and Perform Tasks - Mobile
- Time Reporting for Field Service

Module 9: Analysis and Improvement

- Analyze and Improve
- Analysis and Improvement at Field Titans
- Field Service Reporting and Performance Analytics Overview

Module 10: Practical Simulation

- Field Service Management Process Simulator
- Request a Lab Instance
- Instance Help
- Field Service Management (FSM) Fundamentals Simulator - Introduction
- Initiation: Create a Work Order using a Work Order Template
- Initiation: Create a Work Order without using a Work Order Template
- Qualification: Qualify Work Order Tasks
- Scheduling and Dispatch: Dispatch Work Order Tasks
- Delivery and Confirmation: Accept, Start Work, Record Time, and Close Tasks