

ServiceNow: Field Service Management Implementation

Course Description

The ServiceNow: Field Service Management Implementation course is designed to provide a comprehensive understanding of how to implement and optimize field service management processes. Field service management is a critical component for businesses offering on-site services, and this course equips participants with the knowledge and skills necessary to effectively plan and deploy field service solutions.

Audience

This course is intended for individuals involved in field service management, including:

- Field Service Managers and Supervisors
- Implementation Specialists
- System Administrators
- Consultants
- Anyone responsible for implementing and configuring field service solutions.

Pre-requisite Knowledge/Skills

Participants should have a basic understanding of field service management concepts and familiarity with ServiceNow, the platform on which the course is based.

Mus have completed ServiceNow: Field Service Management (FSM) Fundamentals.

Course Objectives

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

- Plan and prepare for a successful field service management implementation.
- Configure and manage key components of field service management.
- Understand the importance of foundational data and relationships in field service.
- Implement advanced features such as work order templates, questionnaires, planned maintenance, and advanced time recording.
- Optimize scheduling and dispatch operations, including dynamic scheduling and part sourcing automation.
- Configure related processes, including appointment booking, targeted communications, contextual knowledge, and mobile options.
- Access useful course appendices and information about certification.

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