

## ServiceNow Customer Service Management (CSM) Fundamentals

Durée: 3 Jours    Réf de cours: SNCSMF

### Résumé:

Learn the basics of Customer Service Management (CSM) on the ServiceNow platform.

In this 2-day interactive course attendees master the usage of the ServiceNow Customer Service Management (CSM) application. This course is designed for Administrator's responsible for managing the Customer Service Management application. A combination of lecture, group discussions, and lab work helps attendees achieve the following:

- Explore the Customer Service Management application, related applications in the ServiceNow platform, use cases and architecture
- Manage core Customer Service data such as: Case, and case types, Consumers, accounts, account relationships and account hierarchies, Contacts, contact relationships, account teams and responsibility definitions, Contracts, entitlements, and service level agreements (SLAs), Assets, service-aware install base, Configure case forms and state flows, CSM agent workspace and advanced work assignment, Case and account escalation, and major issue management
- Explore Reporting and Performance Analytics , -Create Targeted Communications and Special Handling Notes, -Investigate other key process applications including the Customer and Consumer Service Portals, and Communities, -Explore Customer Service Management with Service Management

### Public visé:

The ServiceNow® Customer Service Management Fundamentals course is for Customers, Partners, and Employees who administer features, functions, and data associated with Customer Service Management. An attendee is a good fit for this course if they perform or advise on any of the following roles or job responsibilities: Customer Service Manager, Customer Service Application Administrator, ServiceNow System Administrator, Technical Consultants and Administrators – who will be configuring, developing or supporting the CSM applications

### Objectifs pédagogiques:

- Through a combination of lecture, group discussions, lab work, and simulated environment, participants explore the core concepts and features of ServiceNow Customer Service Management (CSM) application and perform Administrative functions in their own instance.
- **Course Flow**
- During this two-day, interactive training course, students access the ServiceNow platform in their own student instance, which is a <safe sandbox loaded with demo and test data.
- The class uses a fictitious company and different personas throughout course to present real world scenarios with relevant demonstrations and lab exercises. The class features lecture and group discussions, as well as extensive hands-on practice and reinforcement delivered in a variety of labs and simulated environment.

### Pré-requis:

No prerequisite

- SNF - ServiceNow Fundamentals

## Contenu:

### Module 1: Customer Service Management Principles

#### Objectives

- Introduction to ServiceNow's Customer Service Management Solution
- Learn how to position Customer Service Management across workflows on the Now Platform
- Explore the similarities and differences between CSM and IT Service Management (ITSM)
- Discuss why customization of ITSM to meet CSM needs is not a recommended best practice approach
- Get familiar with customer service terminology
- Learn the difference between B2B and B2C, and how each is managed via CSM
- Be able to describe the various aspects of a customer portfolio and a product portfolio
- Gain hands-on experience configuring core data and supporting reference data
- Learn about the various communication channels and case management
- Introduce matching rules and assignment rules
- Explore and configure the CSM agent workspace
- Introduce and explore major case management
- Explore CSM with service management integration
- Introduce the mobile experience for CSM
- Learn why tracking and analyzing data is important for CSM
- Learn about the portals for B2B and B2C
- Learn how the portals interact with Service Catalog
- Introduction to Community
- Learn how CSM interacts with the Knowledge Portal
- Gain hands-on experience with the customer service portal and the consumer service portal

#### Labs

- Class preparation
- Working with consumers
- Accounts, contracts and hierarchies
- Partners, contracts, and account relationships
- Service-aware install base and the common service data model (CSDM)
- Service contracts and entitlements
- Customer service groups and skills
- Account teams and responsibility definitions
- Configure case process
- CSM agent workspace
- Advanced work assignment

#### Labs

- Class preparation
- Working with consumers
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- Customer service groups and skills
- Account teams and responsibility definitions
- Configure case process
- CSM agent workspace
- Advanced work assignment
- Case and account escalation
- Major issue management
- CSM with ITSM
- Customer service portal: Case creation and asset contact
- Customer service portal: Contract administration
- Customer service portal: Self-registration

### Module 3: Case Management

#### Objectives

- Introduction to ServiceNow's Customer Service Management Solution
- Learn how to position Customer Service Management across workflows on the Now Platform
- Explore the similarities and differences between CSM and IT Service Management (ITSM)
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- Get familiar with customer service terminology
- Learn the difference between B2B and B2C, and how each is managed via CSM
- Be able to describe the various aspects of a customer portfolio and a product portfolio
- Gain hands-on experience configuring core data and supporting reference data
- Learn about the various communication channels and case management
- Introduce matching rules and assignment rules
- Explore and configure the CSM agent workspace
- Introduce and explore major case management
- Explore CSM with service management integration
- Introduce the mobile experience for CSM
- Learn why tracking and analyzing data is important for CSM

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- Introduce and explore major case management
- Explore CSM with service management integration
- Introduce the mobile experience for CSM
- Learn why tracking and analyzing data is important for CSM
- Learn about the portals for B2B and B2C
- Learn how the portals interact with Service Catalog
- Introduction to Community
- Learn how CSM interacts with the Knowledge Portal
- Gain hands-on experience with the customer service portal and the consumer service portal

#### Labs

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- Case and account escalation
- Major issue management
- CSM with ITSM
- Customer service portal: Case creation and asset contact
- Customer service portal: Contract administration
- Customer service portal: Self-registration

## Module 2: CSM Basics

### Objectives

- Introduction to ServiceNow's Customer Service Management Solution
- Learn how to position Customer Service Management across workflows on the Now Platform
- Explore the similarities and differences between CSM and IT Service Management (ITSM)
- Discuss why customization of ITSM to meet CSM needs is not a recommended best practice approach
- Get familiar with customer service terminology
- Learn the difference between B2B and B2C, and how each is managed via CSM
- Be able to describe the various aspects of a customer portfolio and a product portfolio
- Gain hands-on experience configuring core data and supporting reference data
- Learn about the various communication channels and case management
- Introduce matching rules and assignment rules
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### Labs

- Class preparation
- Working with consumers
- Accounts, contracts and hierarchies
- Partners, contracts, and account relationships
- Service-aware install base and the common service data model (CSDM)
- Service contracts and entitlements
- Customer service groups and skills
- Account teams and responsibility definitions
- Configure case process
- CSM agent workspace
- Advanced work assignment
- Case and account escalation
- Major issue management
- CSM with ITSM
- Customer service portal: Case creation and asset contact
- Customer service portal: Contract administration
- Customer service portal: Self-registration

## Module 4: Customer Experience

- Customer service portal: Case creation and asset contact
- Customer service portal: Contract administration
- Customer service portal: Self-registration
- Targeted communications

## Autres moyens pédagogiques et de suivi:

- Compétence du formateur : Les experts qui animent la formation sont des spécialistes des matières abordées et ont au minimum cinq ans d'expérience d'animation. Nos équipes ont validé à la fois leurs connaissances techniques (certifications le cas échéant) ainsi que leur compétence pédagogique.
- Suivi d'exécution : Une feuille d'émargement par demi-journée de présence est signée par tous les participants et le formateur.
- En fin de formation, le participant est invité à s'auto-évaluer sur l'atteinte des objectifs énoncés, et à répondre à un questionnaire de satisfaction qui sera ensuite étudié par nos équipes pédagogiques en vue de maintenir et d'améliorer la qualité de nos prestations.

### Délais d'inscription :

- Vous pouvez vous inscrire sur l'une de nos sessions planifiées en inter-entreprises jusqu'à 5 jours ouvrés avant le début de la formation sous réserve de disponibilité de places et de labs le cas échéant.
- Votre place sera confirmée à la réception d'un devis ou ""booking form"" signé. Vous recevrez ensuite la convocation et les modalités d'accès en présentiel ou distanciel.
- Attention, si cette formation est éligible au Compte Personnel de Formation, vous devrez respecter un délai minimum et non négociable fixé à 11 jours ouvrés avant le début de la session pour vous inscrire via [moncompteformation.gouv.fr](http://moncompteformation.gouv.fr).

### Accueil des bénéficiaires :

- En cas de handicap : plus d'info sur [globalknowledge.fr/handicap](http://globalknowledge.fr/handicap)
- Le Règlement intérieur est disponible sur [globalknowledge.fr/reglement](http://globalknowledge.fr/reglement)