ServiceNow Customer Service Management (CSM) Implementation

Duration: 3 Days   Course Code: SNCSMI

Overview:

This advanced course is designed for administrators, implementers and architects who want to apply their Customer Service Management and platform knowledge to problem solve and implement Customer Service Management.

In this 3-day advanced level hands-on implementation course, attendees will configure a base instance for Customer Service Management based upon a fictitious company scenario and user stories. This course is organized into sprints and retrospectives. Participants are divided into smaller groups where they will research how to complete these stories, be assigned a specific user stories to complete, and configure the system while collaborating with their teammates. After each sprint, learners return to the full class for a sprint retrospective exercise. During the retrospective, each group presents their completed stories, explains how they completed the configuration, and answers questions about the choices they made.

Throughout the class, learners will utilize their existing knowledge of Customer Service Management and other important training to apply what they have learned.

Target Audience:

This course is suitable for individuals implementing ServiceNow Customer Service Management. This includes:
- Customer Service Management Administrators/ ServiceNow System Administrators - who will be administering the applications related to the ServiceNow Customer Service Management (CSM) product.
- Technical /Solutions Consultants and Architects - who will be configuring, developing or supporting Customer Service Management (CSM) product.
- Project/Program/Engagement Managers - who will be learning implementations of Customer Service Management in ServiceNow.
- Process Managers or Administrators - who have oversight of work which will be facilitated using Customer Service Management in ServiceNow.
Learners must have a working knowledge of the Now Platform, including navigation, form configurations, tables, plugins, security, service catalog, service level agreements, dashboards, users, groups, and roles.

Objectives:

- The Customer Service Management Implementation Workshop will prepare participants to run a successful customer implementation of the Customer Service Management application. Participants will review user stories, research solutions, complete configurations, and present their configurations in class as part of retrospective reviews. Student will:

- Identify key resources for CSM Implementation

- Enable required CSM plugins

- Create groups, Internal Business locations, and Product Models

- Extend Case table

- Clone and configure the /csp and /blsp portals

- Create knowledge base for authenticated and unauthenticated users

- Configure workspace

- Create service channels, presence states, work item queues, Advanced Work

- Assignment Eligibility and reject reasons

- Configure and route unauthenticated chat

- Enable lookup and verify

- Create Service Level Agreements and Dashboards for reporting

- Configure playbooks

Prerequisites:

This course assumes learners have taken all prerequisite courses in its associated learning path. Knowledge from the learning path will be applied during this course. Learners best prepared to

Testing and Certification

- It is highly recommended to complete this course (Customer Service Managment Implementation Workshop) first then take the CIS-CSM (Certified Implementation Specialist - Customer Service

succeed in this course are required to have completed:

- ServiceNow Administration Fundamentals
- ServiceNow Certified System Administrator (CSA)
- Customer Service Management Essentials

It is highly recommended to complete these courses before attending Customer Service Management Implementation Workshop. Many concepts from these courses will be utilized throughout the 3-day training and it is expected learners will understand and be able to apply this information.

- Case Types, Service Definition and Service Catalog
- Customer Service Management Implementation Best Practices
- Contact Center as a Service (CCaaS) Integrations
- Customer Relationship Management Foundation: Customer Data Foundation
- Customer Portal and Configurable Portal Widget
- Customer Relationship Management Foundation: Customer Product Foundation
- Knowledge Management for Customer Service Management
- SNF - ServiceNow Fundamentals
- SNPI - ServiceNow Platform Implementation
- SNCSMF - ServiceNow Customer Service Management (CSM) Fundamentals

Management) Exam

Content:

During this three-day interactive training course, participants will access the ServiceNow platform in their own student instance. This instance will have minimal configurations and test data.

Module 1: Implementation considerations

Objectives M1

- Business Models to Customer Data Models
- Industry Data Models
- Security
- Governance
- Organizational Change Management

Module 2: Customer Scenario

Objectives M2

- Customer Scenario
- Customer Service Management Processes
- Statement of Work
- Plans and Packages
- Capability Matrix

Activity M2

- Review the customer's Statement of Work and confirm what package was purchased.

Module 3: Customer Service Management Implementation

Objectives M3

- Review the resources needed for the instance
- Review the sprint plan for the implementation and assign tasks to team members
- Complete sprints
- Conduct retrospective meetings

Activity M3

- Enable required plugins
- Create groups, product models, record producers, cases, knowledge base articles
- Extend and update tables
- Stock management
- Clone, associate record producers, and configure portals
- Configure Advanced work Assignment
- Configure unauthenticated chat and routing
- Configure lookup and verify, end to end turnaround measurement, and playbooks
- Configure dashboards

Module 4: Wrap-up

Objectives M4

- Identify Enhancements and Defects

Further Information:

For More information, or to book your course, please call us on Head Office Tel.: +974 40316639

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