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## ServiceNow Customer Service Management (CSM) Fundamentals

**Duration: 365 Days**    **Course Code: SNCSMF**    **Delivery Method: Elearning (Self-paced)**

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### Overview:

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 Administrators 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

### e-Learning

Interactive self-paced content that provides flexibility in terms of pace, place and time to suit individuals and organisations. These resources also consist of online books, educational podcasts and vodcasts, and video-based learning.

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### Target Audience:

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

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### Objectives:

- 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.
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### Prerequisites:

- SNSAF - ServiceNow Administration Fundamentals
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## Content:

### 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

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- 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
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- 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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- Case and account escalation
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- CSM with ITSM
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## Module 2: CSM Basics

### Objectives

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### Labs

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- Account teams and responsibility definitions
- Configure case process
- CSM agent workspace
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- CSM with ITSM
- Customer service portal: Case creation and asset contact
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- 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

## Further Information:

For More information, or to book your course, please call us on Head Office 01189 123456 / Northern Office 0113 242 5931

[info@globalknowledge.co.uk](mailto:info@globalknowledge.co.uk)

[www.globalknowledge.com/en-gb/](http://www.globalknowledge.com/en-gb/)

Global Knowledge, Mulberry Business Park, Fishponds Road, Wokingham Berkshire RG41 2GY UK