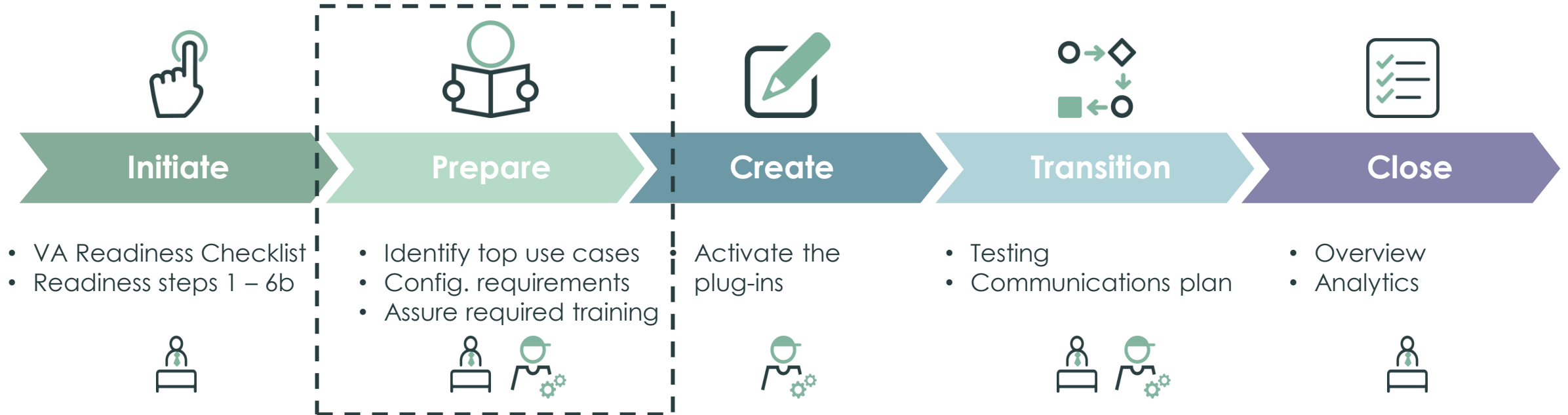




servicenow®

Virtual Agent Use Cases, Requirements & Training

Timeline of implementation



Roles

 Business Lead
  Technical Implementer



Prepare

Train and design for configuration



Prepare phase of implementation



Prepare

Important steps during the prepare phase include:

1. Holding **workshops** to understand your process and platform needs, and **identify your top use cases**
2. Finalizing the **engagement timeline**
3. Refining your **configuration requirements** – depending on which portal platform you are on:
 - a) ServiceNow Service Portal
 - b) Slack
 - c) Microsoft Teams
 - d) Workplace by Facebook
4. Getting all **roles** set up as required
5. Assuring that all **necessary training** gets completed

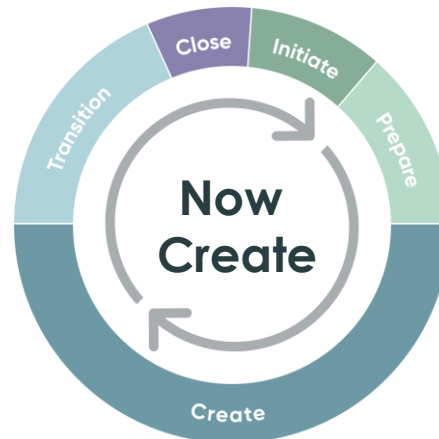
1. Initiate

Define your goals/objectives; collect prerequisite information; and define the key processes for implementation success.



2. Prepare

Hold workshops to understand your process and platform needs; finalize the engagement timeline; and refine your configuration requirements and training.



3. Create

Perform configuration and unit testing.



4. Transition

Perform unit testing and UAT; create and rollout a Communications and Training Plan; go-live; and provide post go-live support.



5. Close

Handoff from implementation team to the platform maintenance team.





VA Customer Top Use Cases



Below are the top use cases seen across all customers currently using VA. Keep this in mind as you analyze your own instance, however, remember that your top use cases will be unique to your own organization.

Category	Use Case
Access and Identity Management	<ul style="list-style-type: none">• Reset Password• Email Issues<ul style="list-style-type: none">○ Outlook Issues○ Email DL Updates/Management○ Email Alias setup• Account Request• User Local Admin Access• Add Users to LDAP Groups
Software Access / Provision Request	<ul style="list-style-type: none">• Software Access/Request or Install (e.g., Adobe Acrobat)• Hardware request
Cloud Management	<ul style="list-style-type: none">• Azure – IHUB Pro Azure AD spoke• AWS – AWS IAM spoke (IHUB Enterprise)
Session Resets / Virtual Desktop Infrastructure (VDI) Problems	<ul style="list-style-type: none">• Collaboration (Webex/Teams) Issues• Citrix Virtual Desktop
Proactive Issue Detection	<ul style="list-style-type: none">• VPN Connectivity• Symantec NetBackup failures



Identify top use cases to automate with VA



By using platform reports it is possible to identify potential topics that could be deployed using Virtual Agent

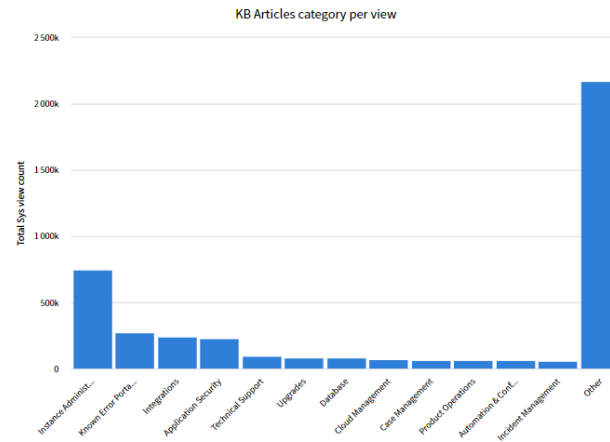
Practitioner insight: Conversational design is an important stage of topic design. Virtual Agent is not there to replace the user interface as an example updating a profile, having to ask 20 questions until the correct field is found.

Topic Identification

- Using your existing data provides great insights into where Virtual Agent could potentially identify one of the three topic types.
- Existing incidents, requests, and KBs can be reported on with example reports detailed over the next few slides.

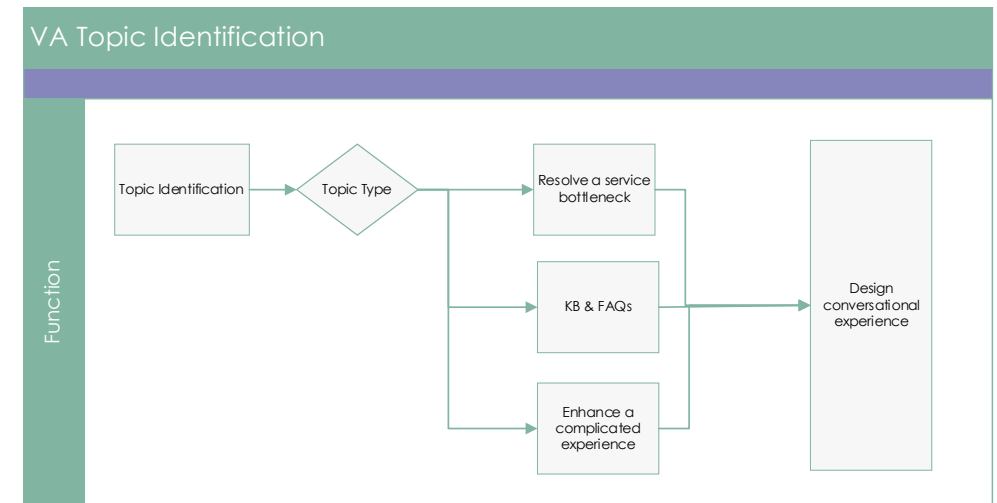
Incident by contact type

0	44	1	65	521,826	8	755,752	152,595	117
1	29	4	130	180,256	9	92,530	26,667	181
2	4		20	25,504		10,245	3,225	19
3	1		4	3,929	1	1,937	1,102	1
4			2	726		583	321	
5				151		825	78	
6				49		134	22	
7				9		33	9	
8				2		9	3	
9				3		8	1	
10						2		
11				1				
12						1		
13						1		
24						1		



Topic types

- Resolve a service bottleneck
- Enhance a complicated experience
- Frequently accessed KBs & FAQs





Identify top use cases – Incident Overview

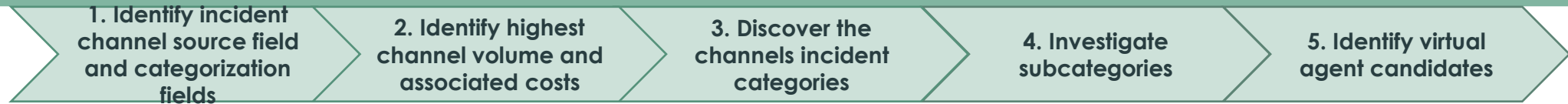


Value and outcomes

The following series of reports can help identify the channel that most incidents are sourced from.

Then, by estimating the costs associated with that channel and calculating the ratio of number of incidents passed to the next support tiers, it will lead your topic identification towards understanding where your service bottlenecks are.

Discovery process



Discovery Process

- Report 1 – Identify highest channel volume and associated costs.
- Report 2 – Discover the channels incident categories that have a high percentage of first-time fix compared to re-assigning to tiers 2 and further.
- Report 3 – Look at subcategories of the categories chosen from report 2.



Identify top use cases – Channel heatmap

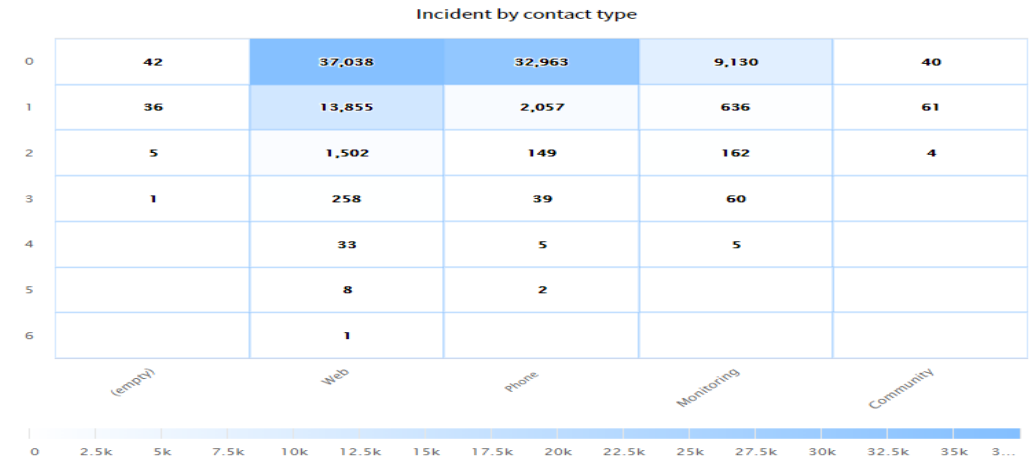


Report 1 – Incident by contact type

- Identify the heat spots and identify the channel that most incidents come from.
- Estimate cost of that channel against costs, for example
 - Web is cheap and phone is expensive, even if low compared to web
 - Estimate cost per channel
 - \$10 for web, \$50 per phone

Report Configuration

- Data
 - Report Name : Channel heatmap
 - Source type: table
 - Table : Incident
- Type
 - Multidimensional reports : Heatmap
- Configure
 - Row: Reassignment Count
 - Column : Contact Type – **This is the channel field**
 - Aggregation: Count
 - Max number of groups: Default
- Filters
 - Active = false
 - Created on ... last 3 months



Report usage example

- This example shows that there have been more web incidents than phone incidents, but by associating a cost against each channel, as an example \$10 per web and \$50 cost per phone. The totals are quite different.
- By estimating the costs associated with that channel and calculating the ratio of number of incidents passed to the next support tiers, it will lead your topic identification towards understanding where your service bottlenecks are.

Next step

- Use the channel(s) identified from this report to feed into report 2. This example we'll be using phone.



Identify top use cases – Channel Category

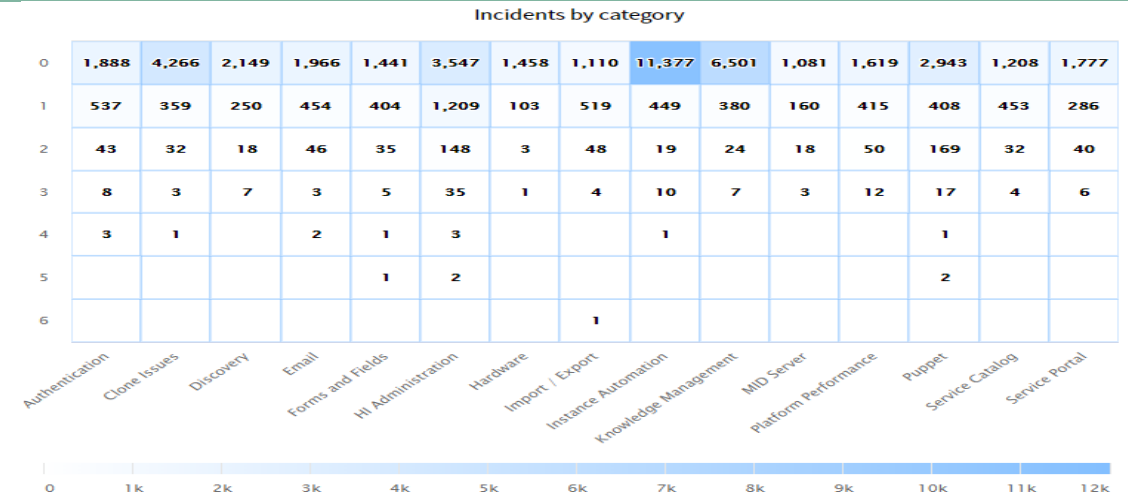


Report 2 – Channel Category

- Using the channels identified in report one, use this report to investigate the categories in which the incidents are in.
- Again look at the ration of the number of incidents passed from the first tier to the tiers below, as this this will indicate that it is a virtual agent candidate.

Report Configuration

- Data
 - Report Name : Channel Category
 - Source type: table
 - Table : Incident
- Type
 - Multidimensional reports : Heatmap
- Configure
 - Row: Reassignment Count
 - Column : Incident Category
 - Aggregation: Count
 - Max number of groups: 15
 - Show Other : Unchecked
- Filters
 - Active = false
 - Created on ... last 3 months
 - Contact type = (input from previous report)



Report usage example

- For the phone channel, we can see that roughly 11,500 calls have come in for instance automation, with a small percentage being assigned to lower tiers, roughly only 4% being reassigned.

Next step

- Use the channel(s) identified from this report to feed into report 3.



Identify top use cases – Channel Sub-Category

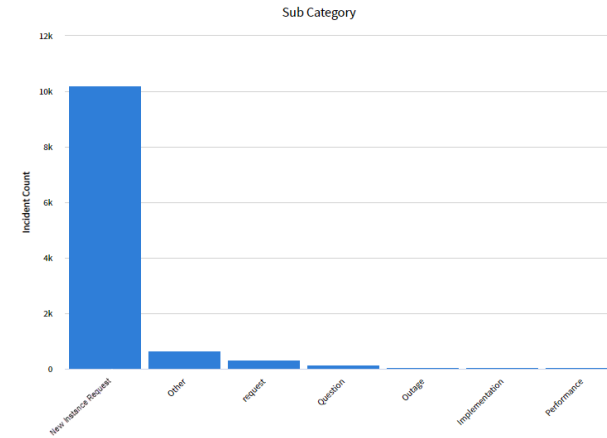


Report 3 – Sub - Channel Category

- Using the channels identified in report one, use this report to investigate the categories in which the incidents are in.
- Again look at the ration of the number of incidents passed from the first tier to the tiers below, as this this will indicate that it is a virtual agent candidate.

Report Configuration

- Data
 - Report Name : Channel Sub Category
 - Source type: table
 - Table : Incident
- Type
 - Bar Chart
- Configure
 - Group by: subcategory
 - Max number of groups: 15
 - Show Other : Unchecked
- Filters
 - Active = false
 - Created on ... last 3 months
 - Reassignment count = 0
 - Contact type = (input from report 1)
 - Incident category = (input from report 2)



Report usage example

- Results show that there is a high level of automation requests coming in via phone call to the service desk. These would be a great candidate to discuss having as a virtual agent topic.
- Using the three reports as an example, it has shown that phoning the service desk for an automation request at a cost of \$50 per call, over three months, equates to $\$50 * 10,000 = \$500,000$ over 3 months.
- This automated via virtual agent could save **\$2,000,000** a year and if averaging 30 minutes a call = **20,000 minutes a year** that could be used on more productive and higher priority incidents.



Requirements for activating plug-ins



Prerequisite: ServiceNow Service Portal live, or Microsoft Teams, or Workplace by Facebook or Slack portals

- For more information on setting up the Service Portal, go to the ServiceNow [documentation](#)

Service Portal (or other portal) chat requirement:

- In order to provide the user with an interactive experience:
 - Install the Chat Interface
 - Configured in the Service Portal

Required Roles:

- Follow the installation steps
 - Check for the appropriate rights to the ServiceNow instance
 - In the Admin role or Virtual Agent Admin role:
 - Turn on the plugins that install the Virtual Agent and NLU* components
 - Then configure the Virtual Agent and NLU components once activated

* These instructions are for setting up VA, NLU not recommended for self-implementation




Assure required training



Follow the path outlined below:

servicenow

Home Get Certified Help Search Now Learning  Login Register

Certification

Virtual Agent Implementer

This path teaches how to use Virtual Agent to design communications that help your users quickly obtain information, make decisions, and perform everyday work tasks like HR request, or customer service questions.



10 Courses Remaining
1 Certification Remaining







Enroll →

 3 Days 8 Hours 53 Minutes  Beginner Level  Certification  Badge

Home > Path

* Mandatory for Path completion

Start Path

-  1.0 ServiceNow Fundamentals
-  2.0 Get Started with Now Create
-  3.0 ServiceNow Platform Implementation
-  4.0 Get Started with Artificial Intelligence *
-  5.0 Virtual Agent Fundamentals, Implementation, and Natural Language Understanding *
-  6.0 Virtual Agent Integrations (Orlando) *

< About this Path

Virtual Agent (VA) makes it easy for employees and customers to get what they need when they need it, with a conversational enterprise experience powered by Natural Language Understanding (NLU). Virtual Agent delivers great experiences, provides better self-service, and empowers service owners.



What you will learn in this Path

-  Identify the features of Virtual Agent and related applications and how they allow you to build an end-to-end self-service solution
-  Identify the steps for implementing Virtual Agent and NLU
-  Build Virtual Agent conversations
-  Build NLU models



Assure required training (cont'd)



-  Start Path
- + 1.0 ServiceNow Fundamentals
- + 2.0 Get Started with Now Create
- + 3.0 ServiceNow Platform Implementation
- + 4.0 Get Started with Artificial Intelligence *
- + 5.0 Virtual Agent Fundamentals, Implementation, and Natural Language Understanding *
- + 6.0 Virtual Agent Integrations (Orlando) *
-  7.0 Certification *
Micro-Certification - Virtual Agent
- + 8.0 Virtual Agent Simulator (Orlando) *
- + 9.0 Virtual Agent Advanced Topics: Surveys
- + 10.0 Virtual Agent Advanced Topics: Keyword to NLU
- + 11.0 ServiceNow Subscription Model
-  Virtual Agent Learning Path (Orlando) Complete

✓ Integrate Virtual Agent with other platform applications

1.0 ServiceNow Fundamentals

🕒 5 Minutes
0%

1.1 ServiceNow Fundamentals Offerings

🕒 1.1.1 ServiceNow Fundamentals Offerings

🕒 5 Minutes

Start

2.0 Get Started with Now Create

🕒 19 Minutes
0%

2.1 What is Now Create?

🕒 2.1.1 What is Now Create?

🕒 1 Minute

2.2 Who Benefits from Now Create?

🕒 2.2.1 Who Benefits from Now Create?

🕒 1 Minute

2.3 How Now Create Works

🕒 2.3.1 How Now Create Works

🕒 4 Minutes

2.4 Going Deeper on Now Create





Assure required training (cont'd)



- Start Path
- + 1.0 ServiceNow Fundamentals
- + 2.0 Get Started with Now Create
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- + 11.0 ServiceNow Subscription Model
- Virtual Agent Learning Path (Orlando) Complete

2.4.1 Going Deeper on Now Create 🕒 2 Minutes

2.5 Get Started with Now Create Review

2.5.1 Now Create Quiz 🕒 20 Minutes

Start

3.0 ServiceNow Platform Implementation 🕒 3 Days
0%

Select a class

4.0 Get Started with Artificial Intelligence * 🕒 5 Minutes
0%

4.1 Introduction to Artificial Intelligence and Machine Learning

4.1.1 Introduction to Artificial Intelligence and Machine Learning 🕒 5 Minutes

Start

5.0 Virtual Agent Fundamentals, Implementation, and Natural Language Understanding * 🕒 5 Hours
0%





Assure required training (cont'd)



- Start Path
- + 1.0 ServiceNow Fundamentals
- + 2.0 Get Started with Now Create
- + 3.0 ServiceNow Platform Implementation
- + 4.0 Get Started with Artificial Intelligence *
- + 5.0 Virtual Agent Fundamentals, Implementation, and Natural Language Understanding *
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Micro-Certification - Virtual Agent
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- + 9.0 Virtual Agent Advanced Topics: Surveys
- + 10.0 Virtual Agent Advanced Topics: Keyword to NLU
- + 11.0 ServiceNow Subscription Model
- Virtual Agent Learning Path (Orlando) Complete

5.1 Virtual Agent Fundamentals, Implementation, and NLU

- 5.1.1 Virtual Agent Fundamentals
- 5.1.2 Virtual Agent Implementation
- 5.1.3 Natural Language Understanding

1 Hour
 2 Hours
 2 Hours

Start

6.0 Virtual Agent Integrations (Orlando) *

45 Minutes
 0%

Start

8.0 Virtual Agent Simulator (Orlando) *

2 Hours
 0%

Start

9.0 Virtual Agent Advanced Topics: Surveys

4 Minutes
 0%

9.1 VA: Surveys

- 9.1.1 VA: Surveys





Assure required training (cont'd)



- Start Path
- + 1.0 ServiceNow Fundamentals
- + 2.0 Get Started with Now Create
- + 3.0 ServiceNow Platform Implementation
- + 4.0 Get Started with Artificial Intelligence *
- + 5.0 Virtual Agent Fundamentals, Implementation, and Natural Language Understanding *
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Micro-Certification - Virtual Agent
- + 8.0 Virtual Agent Simulator (Orlando) *
- + 9.0 Virtual Agent Advanced Topics: Surveys
- + 10.0 Virtual Agent Advanced Topics: Keyword to NLU
- + 11.0 ServiceNow Subscription Model
- Virtual Agent Learning Path (Orlando) Complete

10.0 Virtual Agent Advanced Topics: Keyword to NLU 0%

10.1 VA Advanced: Keywords to NLU

10.1.1 Virtual Agent Advanced Topics: Keyword to NLU 4 Minutes

Start

11.0 ServiceNow Subscription Model 30 Minutes
0%

11.1 ServiceNow Subscription Model

- 11.1.1 ServiceNow Subscription Model Overview 16 Minutes
- 11.1.2 ServiceNow Subscription Model Additional Resources 4 Minutes
- 11.1.3 ServiceNow Subscription Model Quiz 10 Minutes

Start