Create a seamless customer experience

Engage with customers at their point of need
Increase customer satisfaction and revenue with continuous customer journey improvements

One good or bad customer experience can make all the difference in your ability to retain customers and grow your business. That’s why many organizations are looking to improve their customer and field service to create seamless customer experiences that make it as easy as possible for customers to get the help they need, when they need it.

Delivering a seamless customer experience unfortunately is a lot easier said than done, particularly when lacking self-service capabilities, switching between disconnected customer service systems, and coping with broken operational and customer service processes. When done right, however, the benefits can be great: YMCA of the North improved their response-time SLA compliance by 19%; Interstate Batteries was able to make their initial response to queries three times faster; Capita Software saw their NPS score go up from +2 to +52; and 7-Eleven reduced case volume by 93%.

ServiceNow helps your service team provide seamless, high-quality service by managing the end-to-end resolution of their requests. It starts by empowering customers with personalized self-service backed by automation, which allows you to respond to your customers’ demands and cater to their preferences. Of course, when customers require live assistance, you can provide your agents and service technicians with a single location that provides easy access to the tools, knowledge, third-party information, and guidance that can help them more quickly and efficiently address customer requests and resolve issues.

The result is a streamlined customer experience that anticipates the needs of your customers and reduces their efforts. This can help you improve customer satisfaction and retention, as well as generate cost savings and potentially greater revenue opportunities for your business.

The following use cases show you more specifically how ServiceNow can help you:

• Add customer self-service to speed resolution any time of the day
• Stand up a knowledge management program for increased resolution rates
• Connect siloed systems to reduce agent swivel-chairing and fix customer issues faster
• Avoid disruptions to maximize asset uptime
Provide assistance to customers anytime online

Make it easy for customers to find answers and complete requests

When customers have questions or issues, they want answers and solutions fast. They want to be able to quickly find information, add new services, diagnose issues, and when needed, schedule a service visit or repair as soon as possible. Unfortunately, when customers go online to get assistance, they often end up wasting time and getting frustrated. The potential solutions they need are usually scattered across multiple locations and mixed in with a lot of unrelated information. Worse yet, anything transactional, such as scheduling a repair, typically requires the customer to wait until business hours, when they are forced to contact a customer service agent to complete the request.

Organizations need to provide self-service assistance that can help customers do more than just get information. It should help them resolve their issues, and, if needed, kick off automated workflows to complete more complex requests. This means improving disjointed, limited self-service channels to provide customers a seamless, convenient experience that keeps them satisfied. ServiceNow can help.

Deliver relevant, personalized self-service assistance

ServiceNow’s customer service solutions enable customers to access resources and find solutions online on their own and anywhere along their journey, without needing assistance from a service representative. ServiceNow provides a common platform that connects systems, people, and workflows to automate and streamline the completion of requests. Customers can quickly receive contextual, personalized results based on their profile and history, and access relevant knowledge articles to get answers to common questions fast. In addition, they can gain insights from their peers and experts on how to address problems and extract more value through a community that facilitates the sharing of ideas, experiences, and solutions. ServiceNow helps you:

• Provide a launching point for all self-service options, whether it’s through a service portal or by integrating self-service capabilities into existing digital properties through no or low code configuration.
• Give personalized answers to customers through an AI-powered chatbot that understands natural language and customer-specific information.
• Fully automate solutions to common requests, such as password resets, and trigger workflows that automatically route more complex requests to the departments that can assist to speed response times and resolutions.

Results

• Speed resolution by providing a single starting point for personalized customer assistance at any time of day through comprehensive self-service on your website
• Improve the customer experience and reduce agent workloads by automating the routing and completion of common requests
• Increase satisfaction by directing customers to proven solutions, peers, and experts to resolve common issues and crowdsource new solutions
ServiceNow customer self-service

The specific stages and steps for customer self-service and related workflows vary widely, depending upon the industry and use case, but they can be digitized and automated by ServiceNow.

1. **Visit** – Self-service support can be provided through a dedicated customer service portal or embedded in the company’s existing web property. If a customer logs in, their visit will be automatically tied to their account profile, including service contracts and purchased products and services, for a more personalized interaction.

2. **Ask chatbot** – The customer often starts by asking a question or describing their problem (in natural language) to a chatbot. This chatbot can provide several suggestions, based on the question/problem and the profile of the customer.
   - **Visit community** – The customer may be directed to an answer in a user forum.
   - **Read article** – The customer may be provided a knowledge article that describes the problem and recommends a solution or a way to troubleshoot.
   - **Make a request** – Depending on the issue, the customer may be given the option to request additional help, like schedule a maintenance or repair visit. If the customer chooses this option, they will receive several days and times to choose from that coincide with the availability of the technicians best able to complete the work.

3. **Engage** – The customer can explore and decide whether any of the answers or solutions work. If they decide to schedule an appointment, it will automatically create a work order. The work order will be auto-routed and assigned to the right technician with the right skills. The work order also includes the most common parts needed to repair this model, so the technician shows up prepared. If the solution is automated, this engage step can be skipped.

4. **Complete** – The workflow is completed when the customer indicates they have what they need (by closing the chat and/or logging off) or, for instance, when the appointment is done.

5. **Provide audit trail** – All the data, communications, and timelines are tracked by the platform, making information easy to pull for reports, audits, analysis, and ongoing process improvement.
Increase self-service and agent-assisted resolution rates

Provide your customers and employees easy access to information and answers

When it comes to delivering exceptional customer service, knowledge is one of your biggest assets. Unfortunately, useful information can be hard to find and access. It’s often trapped in siloed systems, such as standalone case management tools, or in the heads of your agents and employees. As a result, knowledge is typically presented in a piecemeal and haphazard fashion, with companies offering technical documentation or frequently asked questions (FAQ) that tend to be inadequate for many of the support-related questions customers have.

Context matters, particularly when customers and agents need answers. Responses have to be tailored—for example, based on a product model or subscription level—and unrelated topics filtered out to surface the most pertinent information fast. Responses must also be intuitive, helping customers and agents find information related to their search that they may not have known to look for but that could be important. The quality and availability of all this information must be reliable, which requires a strong governance process to keep content complete and up-to-date. ServiceNow can help you stand up a knowledge management program that puts your knowledge to work for you, providing the personalized, contextual information your customers and employees need, when they need it.

Speed up access to high-quality information and knowledge

ServiceNow’s customer service solutions put the knowledge your customers—and your agents—are looking for at their fingertips, so they can find answers fast and resolve issues on their own. A common platform connects your systems, people, and workflows to create closed-loop knowledge creation and agent-assist processes that promote knowledge sharing, boost agent productivity, and increase customer and employee satisfaction. By providing a structured approach to content curation with many built-in capabilities to support Knowledge-Centered Service (KCS®) v6 and out-of-the-box workflows, ServiceNow makes it easy to identify knowledge gaps and trigger automated workflows to develop new articles to keep the content relevant and up-to-date. ServiceNow helps you:

- Provide a unified knowledge base that can consistently provide customers, agents, and other employees assisting customers, such as field service technicians, with contextual information and proven resolutions.
- Promote knowledge sharing by empowering agents to create articles in the context of their work and by harvesting community solutions for easier discoverability as articles.
- Reduce agent load and follow up cases by identifying knowledge gaps using machine learning, curating new and updated content, and tracking usage, governance, and quality trends to continuously improve the quality of content.

1 KCS® is a service mark of the Consortium for Service Innovation™
**ServiceNow knowledge management workflows**

The specific stages and steps in the creation and use of knowledge articles and their related workflows vary, depending upon the industry and use case, but they can be digitized and automated within ServiceNow.

1. **Access self-service** – Customers can look for solutions or answers by searching or browsing the company’s website.

2. **Contact agent** – To get what they need, customers may navigate from self-service to assisted service and initiate contact with an agent. In their desktop application, agents will receive AI-assisted recommendations, including knowledge articles, for resolving the case. Agents can also conduct their own search through the knowledge base to find relevant information. If the agent didn’t find a helpful article and the solution will be needed again for other customers, the agent can draft or outline a new article from the case—or update an existing article.

3. **Leave article feedback** – Customers or agents can rate articles and leave feedback to indicate whether they were useful in resolving their problems or requests. The feedback triggers a review, which can lead to updates or new articles.

4. **Identify gaps** – Machine learning is used to automatically determine and visualize knowledge gaps based on clusters of cases without article coverage.

5. **Create task** – A case manager reviews the gaps identified by machine learning and creates tasks for the topics that would benefit from new or updated articles. Workflows automatically assign and route the tasks to knowledge authors.

6. **Write or update articles** – Knowledge authors use information provided by feedback or included in tasks by a case manager to create or update articles.

7. **Update knowledge base** – Workflows coordinate reviews and approvals, leading to the publishing of new or updated articles for use by both customers and agents.

8. **Provide audit trail** – All the data, communications, and timelines are tracked by the platform, making information easy to pull for reports, audits, analysis, and ongoing process improvement of the article lifecycle.
Empower agents with insights and guidance

Resolve cases faster to meet customer expectations

Working in a contact center is challenging. When a call or message arrives in the queue, an agent must quickly figure out who the contact is, why they are reaching out, and what they need to do to help them. This takes easy, immediate access to relevant information about the customer and their history, including records of the products and services they own and use, any past interactions they’ve had with the company on any service channel, and any insights into their preferences and inclinations. All this information must be at an agent’s fingertips, if they are to best resolve the issue and keep the customer satisfied.

Unfortunately, quick access to relevant information isn’t always possible. Customer interaction records are often in each channel’s application, while customer purchasing and profile information—including which products and services the customer is actually using—are typically found in different applications. This means agents are constantly switching between their workspace and siloed, third-party systems—known as “swivel-chair integration”—which can create serious gaps in understanding and delays that can impact the agent’s ability to help the customer. In addition, agents may simply not know how to address a complex issue, due to a lack of experience or authority, or what should happen next, resulting in frustrating and inconsistent experiences that can lead to dissatisfaction and even churn. ServiceNow® Customer Service Management can help you give agents the full picture they need, with insights and guidance, to resolve issues quickly and meet customer expectations.

Enhance the customer experience with better prepared agents

ServiceNow’s customer service solutions are designed to help front-line and middle-office agents resolve cases—especially complex ones—faster. A configurable workspace with integrated third-party data gives agents a single, consolidated view of the information they need to more quickly serve customers. Agents also have access to next-best actions from their desktop, which helps guide them down the optimal path, based on the context of the case, to increase first contact resolutions and potential up-sell and cross-sell opportunities. By connecting people, systems, and workflows on a common platform, ServiceNow helps agents efficiently address customer requests and provide a fast, personalized experience that keeps customers satisfied. With ServiceNow, you can:

- Boost agent productivity by making it easy for them to access information, including customer-related data outside ServiceNow, that will help them address the customer’s issue
- Improve first contact resolution by dynamically guiding agents in their desktop along the optimal path to resolve complex cases
- Increase revenue generation via upsell and cross-sell opportunities by providing agents with customer insights and next-best actions they can use to drive personalized, engaging experiences

Use case

Reduce agent swivel-chair

Challenges

- Data silos and separate systems create constant swivel-chairing as agents must repeatedly switch between their desktop and other applications to help customers
- Lack of agent guidance can add delays, leading to incorrect or ineffective actions when trying to resolve complex cases
- An inability to present customers with personalized recommendations, based on need and service history, can result in frustrating experiences

Solution

Customer Service Management and IntegrationHub, plus other products available on the Now Platform

Results

- Boost agent productivity with consolidated, easy access to the information they need, including data from third-party systems, to help customers
- Improve first contact resolution by providing effective guidance directly in the agent desktop
- Increase revenue generation opportunities by helping agents drive personalized, engaging experiences
ServiceNow swivel-chair reduction workflow

The specific stages and steps for the agent associated with resolving customer issues can vary, depending on the industry and situation, but each can be digitized and automated within ServiceNow. The following is a customer issue that needs to be troubleshooting:

1. Submit and assign
   - A customer reports a product or service issue via their channel of choice. A case is created and directly assigned to a customer service agent, based on their skills, experience, and availability.

2. Review customer information
   - The agent brings up a centralized view of the customer's profile and history, including the adoption status of the products and services they have purchased, any knowledge base articles they have viewed, and any records on chatbot or live interactions they have had. The view also includes customer data and insights from third-party systems, such as customer health scores, churn risk, and recent transactions.

3. Follow guidance to resolve issue
   - The agent is dynamically presented with the next-best action to take, based on the context of the case. In this example, the agent is guided through a troubleshooting process, which eliminates the need to follow a static list of steps that may not fully apply to the situation. The agent is presented with questions to ask, based on previous customer answers, and receives guidance on the next step to accelerate resolution. What's presented to the agent is completely configurable—it could be a proposed solution, a workflow for creating a task, such as a work order for a technician, or even an additional set of questions.

4. Present upsell or cross-sell
   - After resolving the issue, the agent can be guided to make an upsell or cross-sell offer. They will be prompted with the questions to ask or steps to take, based on the customer profile, context of the case, and available offers. The agent can then complete the purchase process, if needed, with the customer.

5. Close case
   - The agent updates the case record and closes it.

6. Update customer information
   - Information about the customer is updated. In this scenario, the information includes the new products purchased and any customer insight data stored in third-party systems, such as the customer’s churn risk.

7. Provide audit trail
   - All the data, communications, and timelines are tracked in the case, making information easy to pull for reports, audits, and analysis.
Fix customer issues faster

Use case
TRIMEDX

Challenges
• Data silos and disconnected systems made it hard to access the information needed—often stuck in multiple spreadsheets
• An inability to see customer and case status and histories led to long average handling times and poor employee and customer experiences
• Inflexible processes and systems couldn’t address changing needs of business

Solution
Customer Service Management and Field Service Management

Results
• Increased asset uptime with quicker time to resolution and preventive maintenance
• Minimized service costs by ensuring the right technician is equipped to fix issues fast the first time
• Improved customer (and employee) experience and satisfaction

Driving up customer-submitted cases not only delivers a cost-savings for us, but also a better customer experience.

– Doug Folsom, CIO of TRIMEDX
Field service operations workflow

The specific stages and steps for field service operations can vary by industry and use case, but each can be digitalized and automated within ServiceNow. The following is an example for a healthcare provider:

1. **Open request** – A clinical engineering manager at a healthcare provider has been notified of an issue with an MRI scanner that the most recent firmware upgrade can solve. The manager logs into the self-service portal of the clinical asset management vendor and opens a service request with a preferred time of service using Appointment Booking.

2. **Auto-generate work order** – The appointment automatically generates a work order that contains all the tasks needed to complete the upgrade.

3. **Auto-dispatch technician** – Tasks can be automatically assigned to a technician based on their location, skill set, and availability using Dynamic Scheduling. The technician will receive a push notification on their mobile app, which they can see and accept (or reject for reassignment to another technician). Once accepted, the work order is updated.

4. **Maximize efficiency** – With the ServiceNow Mobile Agent app, the technician can access information, including location, equipment, customer history, knowledge articles, etc., to help them successfully complete the task. When the technician is on their way, a text message is automatically sent to notify the customer and includes a link to view a map with the technician’s current location and estimated time of arrival to set expectations and improve the overall experience.

5. **Complete work order** – Once the technician upgrades the firmware and completes the task, the clinical engineering manager can digitally sign and confirm the work order is complete.

6. **Track and audit** – A PDF summary of the signed work order is automatically created, which includes the completed tasks, parts used and returned, incidental expenses, and the time required to complete the work. The PDF is attached to the work order form for tracking and audit purposes. All the data and timelines are also tracked in the work order, which means it’s easy to pull everything needed for trend analysis, reports, and audits to satisfy compliance requirements. Key performance indicators (KPIs) specific to field service are included out-of-the-box for ServiceNow Performance Analytics dashboards.

6. **Provide audit trail**
   - PDF summary of work order is available for tracking and audit purposes
   - Tracks everything (tasks and data) in work order to support future analysis, reporting, audits, and compliance activity
Maximize asset uptime with preventive maintenance

Keep assets operating as they should to keep your business running

It’s easy to understand why regular preventive maintenance is important. It can keep assets operating as they should to help you avoid costly downtime and repairs and optimize the value of your investments over their useful lifetime. Keeping track of what needs to be maintained and when, however, can be difficult, particularly when the information you need is scattered across multiple spreadsheets and systems.

To ensure effective maintenance, you need a way to track information and get alerts on milestones to ensure critical updates and maintenance aren’t missed. You need to be able to schedule downtime for maintenance when it’s convenient, as opposed to when something breaks, and you need to be able to measure performance to optimize your field service activity. With ServiceNow Field Service Management, you can do all that and more.

Use planned maintenance workflows to prevent issues

ServiceNow Field Service Management leverages integrated Asset Management to track asset history and schedule maintenance based on regular intervals or usage. With a complete history of customer assets, technicians can make the most of each truck roll for comprehensive service visits that reduce repeat trips. In a recent Forrester Consulting study, four ServiceNow customers saw a 17% deflection of truck rolls through first-time resolutions and preventive maintenance over three years. Using Field Service Management, you can automate your field service operations to:

- Maximize asset uptime and help prevent interruptions to critical operations using Predictive Intelligence to identify and resolve issues before they can become problems.
- Improve efficiency through automated workflows.
- Increase visibility to measure and optimize field service performance.
- Ensure compliance through automatic scheduling and reporting.
- Speed time to resolution with a global knowledge base that puts relevant information at the fingertips of agents and technicians.
Preventive maintenance workflow

The specific stages and steps for preventive maintenance workflows vary by industry and use case, but each can be digitalized and automated within ServiceNow. The following is an example for a transportation company:

1. **Define workflow** – An aircraft maintenance manager sets up a maintenance plan to trigger a diagnostic alert after every 25 hours of flight time. The diagnostic verification must be completed before 60 hours and more extensive checks performed every 200 hours, depending on the aircraft type.

2. **Auto-generate work orders** – When a trigger threshold is met, the maintenance plan automatically creates one or more work orders, utilizing templates that contain the appropriate series of repeatable tasks for each aircraft type. These tasks can be automatically assigned to personnel based on their location, availability, and skills.

3. **Notify technician** – An avionics technician is notified they have been assigned a task. They log into ServiceNow to see and accept (or reroute) the task that needs to be executed to finish the maintenance diagnostic.

4. **Provide comprehensive maintenance** – With integrated Asset Management, the technician can see asset details, such as its subcomponents, as well as its entire service history, including information on what parts need to be replaced or serviced. In addition, the technician can get recommendations, directions, tips from knowledge articles and previous work orders to help complete the task.

5. **Complete the task** – Once the technician finishes the maintenance and updates the task, the next planned maintenance appointment is scheduled and assigned automatically.

6. **Provide audit trail** – All the completed tasks and data are tracked in the maintenance plan records for future reference, so it’s easy to pull data needed for trend analysis, reports, and audits to satisfy compliance requirements.
Learn more about creating a seamless customer experience by managing the end-to-end resolution of customer requests at [www.servicenow.com/workflows/customer-workflows.html](http://www.servicenow.com/workflows/customer-workflows.html).