Customer Project Management in
ServiceNow Customer Service Management

The challenge

It's common for customers to have long-running projects with the companies they do business with. Examples include new product setup or new customer onboarding. These projects typically have many steps, some executed by the vendor, some by the customer, some by field workers.

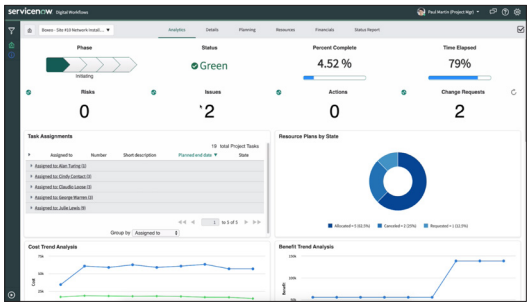
One of the biggest challenges customers face is lack of visibility into project status and details. This is because project management systems used by project managers are typically siloed from the portals customers use. To compound the issue, when customers call customer service for help, customer service agents lack visibility into project data as well. Manual workarounds ensue—phone calls, emails, texts—to help customers, project managers, and agents communicate.

The ServiceNow solution

The Customer Project Management application solves these challenges by integrating ServiceNow® Customer Service Management and ServiceNow® Project Portfolio Management on a single platform. Now visibility is easy for everyone!

Customers can track and manage complex projects from start to finish. The Customer Service Portal allows authorized customers to view project information and update project tasks. They can create cases for specific projects or tasks, and can also view project change requests, work orders, status reports and sub-projects.

Project managers who create and manage customer projects can associate projects with specific accounts and identify customer contacts who have access to projects and specific projects tasks. These steps are what provide visibility to customers on the portal. Project managers can also assign tasks directly to customers.



Project managers associate projects with accounts, manage progress, and control task assignments.

Customer service agents are no longer in the dark when customers call for service. They can create cases and link them to projects or project tasks and can view project details from the agent workspace to quickly communicate case status to customers.

Customer service leaders and project leaders gain visibility into the cost of serving customers on complex onboarding or other projects through the financial capabilities within Project Portfolio Management.

Learn more

Visit **servicenow.com/products/customer-service-management.html** and **servicenow.com/products/project-portfolio-management.html**.

Note: Customer Project Management is included in the Customer Service Management Professional and Enterprise packages and requires Project Portfolio Management.

Empower customers

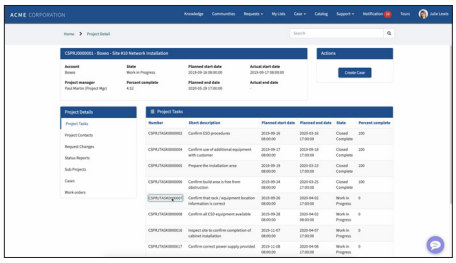
Give customers visibility into project status on the customer service portal. Enable them to track complex projects and complete assigned tasks.

Reduce inbound contacts

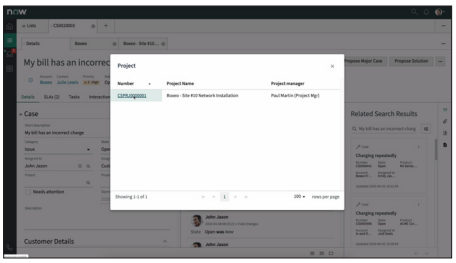
Enable customers to create cases for projects and track their resolution. Route cases directly to project managers so they can take action.

Reduce costs

Provide customer service and project leaders with visibility into the cost of serving customers on complex projects.



Customers have visibility into project status and tasks.



Customer service agents can link projects to cases and view project details.

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