Customer Service Management Use Case Guide

Ramping up and optimizing service fast in the new normal
Your customers expect even more of you, regardless of what's going on in the world

Never before has customer service been asked to pivot and adapt so much while still maintaining high levels of care. Organizations are reacting to a disruptive number of customer requests with fewer employees available to respond. In the new normal, scaling operations for unplanned volumes with digital customer service is essential. ServiceNow Customer Workflows enable organizations to expand capacity via automated self-service, organize resilient operations for unforeseen circumstances, and manage location-based work efficiently and safely. ServiceNow uses connected digital workflows to make customer service better for not just customers, but for the agents and technicians working to address issues. ServiceNow® Customer Service Management and Field Service Management assist with:

1. Optimizing your customer contact center, even when everyone is working from home
2. Maximizing customer self-service
3. Improving customer experience with Proactive Customer Service Operations
4. Ensuring field service management optimization and safety
5. Managing the vendor lifecycle

The following use cases demonstrate how ServiceNow can help your organization expand capacity via automated self-service, organize resilient operations for unforeseen circumstances, and manage location-based work efficiency and safety.
Optimizing your customer contact center, even when everyone is working from home

Even before the pandemic completely changed the notion of a “customer contact center,” they were a complex environment with many competing priorities. Now with agents working from home, there is even more of a need for tighter processes. Companies using Customer Service Management can ensure they are delivering a seamless customer experience powered by modern, efficient technology, no matter where that service agent sits.

When a customer contacts customer service (regardless of channel—telephone, email, chat, or others), Predictive Intelligence uses machine learning to categorize, prioritize, and assign cases to customer service agents like Chris. Other work items like chats are automatically assigned to Chris and other agents based on their availability, capacity, and optionally, skills using work item queues, routing conditions, and assignment criteria.

Chris’ work is streamlined because Agent Workspace offers a single 360-degree view of work-in-progress. This translates into several benefits: a shorter period to get new agents productive, elimination of the "swivel chair" syndrome of accessing multiple tools, and a seamless handoff of customers from Virtual Agent and third-party CTI providers directly to Chris and other agents. In the backend, Customer Service Management helps consolidate multiple, disconnected (and redundant) systems. Agent Assist, powered by machine learning, suggests possible solutions to Chris it finds in the knowledge base, online community, and even other cases.

For many companies, Service Level Agreements (SLAs) are an important part of delivering service—and missing them can have big consequences. From tracking SLAs on a per-customer basis to driving actions across teams with workflow to solve issues rapidly, Customer Service Management ensures Chris doesn’t miss deadlines.
Agent Workspace provides a complete view of each customer case.

Speaking of workflow, it’s pretty typical that problems customer service deals with are the result of an issue in another department: for example, customer billing issues result from problems in Finance. Workflow connects the issues Chris encounters to the departments where the root cause of problems live so they can be permanently addressed. Chris can keep tabs on the resolution with Case Action Status, making it easy to move cases to other resources and to monitor multiple open cases tied to a single problem.

When a big problem crops up—affecting a large number or even all customers—it’s unfortunately too easy to fall prey to chaos: a spike in contact volume, challenges identifying affected customers, and assembling the team necessary to address the underlying issue. Major Issue Management helps corral all the affected customers—both those that have reported the problem and those likely to encounter it—into a single process to address the issue. A single Major Case can be created and updated to reflect progress towards a solution. The problem can be assigned to the responsible team via workflow. Ongoing, proactive communications of status to affected customers and internal team discussion is centrally managed from the Major Issue. This means Chris and other agents aren’t spending time working on the same issue and the issue gets addressed sooner—better for the customer and reducing the stress on Chris.

Good decisions come from good information. With analytics built directly into the platform, insights like understanding issue trends, contact channel performance, opportunities for new knowledge article, agent productivity, and more are available. There are built-in KPIs to get started and more can be created.

With Customer Service Management and the power of the Now Platform, optimizing the customer contact center in any format—driving higher customer satisfaction and keeping Chris productive—is within reach!

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“Great customer service is not just about cutting costs or making operations more efficient. Instead, it’s a systematic reinvention of established technology, data, and operations — leveraging automation, data, and agents together to exploit each of their unique strengths.

— Forrester, The Three Customer Service Megatrends in 2019
Maximizing customer self-service

Customer service is shifting towards customers helping themselves and peers instead of calling a support number. According to Harvard Business Review, 81% of all customers attempt to take care of matters themselves before reaching out to a live representative.

This includes reading knowledge articles, connecting with other customers via forums, or just searching the internet for answers.

ServiceNow Customer Service Management offers resources ranging from a knowledge base to communities to a customer portal and virtual agent to help customers help themselves. It can start with a simple internet search to lead the customer, Kris, to a helpful Community post, a forum of customers and employee experts. The post is about an issue very similar to the one Kris is having, and it also has a knowledge base article attached with the issue and answer that has been marked correct. This post was turned into a knowledge article through knowledge harvesting, which makes it easy to create new knowledge content.

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Communities allow customers and experts to exchange ideas and solve problems. Easily turn solved questions into knowledge base articles.

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Customizable customer portal
Show customers relevant content based on the products and services they own. Provide self-service access from any device at any time.

Connect customers and experts via Communities
Let customers interact with each other and product experts in helpful forums to share ideas or get questions answered. Easily turn posts into knowledge articles or support cases.

Provide a knowledge library
Give customers access to a wealth of answers with Knowledge Management. Contextual search and service portal integration get customers the right info.

Get answers fast with Virtual Agent
Customers can get help from the Virtual Agent at any time to solve common issues quickly.

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Kris is also shown a list of related posts, knowledge base articles, and documentation on the Community post suggested by machine learning. She digs further into her issue via these recommended posts and learns there’s a firmware upgrade she can apply that might also correct her problem, but she’s not quite sure which version is correct.

Kris starts a chat with the Virtual Agent, an enterprise chatbot solution that guides her through a series of questions to determine what she needs. The Virtual Agent is able to provide Kris with a link to the exact download link needed to perform the upgrade.

Through Communities, Knowledge Management, and Virtual Agent, Kris was able to fix her issue herself without having to contact support. Not only is the customer happier because she was able to solve her issue when she wanted to, but the company using ServiceNow for customer service can also save costs by avoiding 15% of customer contacts through self-service tools.²

³ https://www.servicenow.com/lpayr/analyst-reports/forrester-csm-tei.html
Improving customer experience with Proactive Customer Service Operations

In an increasingly connected world, there are more monitoring tools than ever before. That impacts customer expectations – they want businesses to know when there’s an issue or outage, be actively working on the problem, and notify customers about it rather than relying on customers to let them know there’s a problem.

However, it can be challenging for organizations to provide this level of service due to a lack of visibility. That can include difficulties in tracking the solutions and services owned by customers and silos between monitoring and customer service systems. These teams are often disconnected with no clear communication process.

ServiceNow uses Proactive Customer Service Operations, part of Customer Service Management, to provide service monitoring and customer service case management with a service-aware install base to know which services customers own and use. When a service has a problem, it can be detected, and the impacted customers can be identified and kept informed of the latest status and when they can expect a fix.

It starts with service monitoring in ServiceNow® IT Operations Management. A network operations center operator sees an alert about a service at risk of disruption due to running out of disk space.

![The IT Operations Management dashboard shows an alert about an impacted service that affects multiple customers.](image)

The Network Operations Center (NOC) operator creates an incident from the server alert, and as this will impact customers, it also automatically generates a proactive case for customer service. This lets the NOC immediately notify customer service of the issue.

The customer service case is assigned to a customer service agent, who reviews the details and sees the information carried over from the original alert. The service-aware install base lets the agent quickly see which customers are impacted instead of switching between multiple systems. As this impacts several customers, he proposes a major case, which then goes to the major case manager.

Know which customers use which services
The service-aware install base connects customers to services to know who would be affected by a disruption.

Connect monitoring and customer service
Make it easy for operations to keep customer service in the loop when there’s an issue.

Take proactive action
Notify customers that the problem is being addressed before they’re ever aware of it.

Keep customers informed
Give customers up-to-date information on status or workarounds while reducing customer contacts.
The manager accepts the major case and automatically creates child cases for each impacted customer. The parent–child relationship between the major case and individual customer cases simplifies case management, especially when a large number of customers are involved. The manager uses the parent major case to send communication to each impacted customer without drafting individual messages.

The impacted customers receive an email to let them know of the issue. They can also log into the customer portal to see that there is a known issue and view communication and status.

The customer portal alerts customers to a known issue. Updates are published to keep them up-to-date on status.

With ServiceNow Customer Service Management, the service provider was able to identify the issue and start working to correct it before customers were ever aware. Customers know what to expect so there are no unpleasant surprises. Proactive service provides both a better experience for the customer, who is kept informed, and for the service provider, who will avoid additional customer contacts about the issue.
Ensuring field service management optimization and safety

Customer satisfaction has become a key metric by which field service is measured. That rating can be improved by fixing issues quickly and in one visit. While this seems straightforward, about 24% of field service calls require at least one follow up visit to complete. This can happen because the technician didn’t have the right information, skills, or equipment to complete the work.

Ensuring safety in this new world is also of utmost importance. The technician needs to be sure of providing careful service with all health regulations and the customer needs to feel secure in who is coming out to help them.

In addition, customers want the convenience of requesting and tracking service without needing to phone customer service. But in a recent Gartner report, only 39% of field service providers said they offered a customer portal to make service requests. Because Field Service Management integrates with Customer Service Management, customers can leverage the same self-service portal they use to access knowledge base articles or raise new cases to schedule field service visits.

Bank manager George has been informed of some issues with his bank’s ATMs that he believes should be solved by the most recent firmware upgrade. He logs into the customer support portal for the ATM vendor and selects firmware upgrade from the service catalog, which displays a host of self-service options for him to choose from. Field Service Management integrates with ServiceNow Asset Management, meaning the ATM vendor is able to track which ATM models are at George’s branch location and display a list for him to select from. Once he identifies the specific ATMs that require the upgrade, he is shown a list of available appointments for a technician to perform the work.

Customers can self-schedule service appointments in the customer portal.

Self-schedule appointments
Allow customers to choose service appointments at their convenience.

Automatically assign work
Consider skills, parts, and availability to automatically assign work to the best technician for the job.

Get mobile access to work orders
View the appointment location, assets, knowledge articles, and more in a native mobile app to always have access to necessary information. Optimize the day’s schedule to minimize travel, track part usage, and complete checklists easily.

Keep the technician and customer safe
Technicians can be reminded of health requirements and validate that they have the proper safety equipment to complete the task.

Monitor technician progress
Managers and dispatchers can track SLAs and team performance with reporting and dashboards. Improve technician efficiency and customer satisfaction.

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George selects his desired appointment time, which creates a new work order. This work order is automatically assigned to a technician based on location, required skills, and equipment needed to complete the work. Field service technician Teddy receives a push notification on his phone to let him know new work order tasks have been assigned to him.

He accepts the tasks and they are added to his work queue for the day. Route optimization means the tasks have been assigned to minimize travel time as well as meet the appointment window. Back at the office, the dispatcher also has visibility into all of the work orders, their progress, and technician locations so that she can ensure SLAs are being met.

When it’s time to head to this new appointment, Teddy can see on his phone exactly where he needs to go. He also can see what work needs to be done and what equipment is needed in the mobile app. He even has access to knowledge base articles to guide him through the firmware upgrade process.

Teddy also is reminded of distancing and health regulations he needs to observe and has to indicate via the app that he understands and has the proper mask, gloves, etc. to keep himself and the customer safe.

Once the upgrades are complete, Teddy can add notes to the work order and ask George to sign-off that the work is complete. This results in a PDF that shows the time worked, parts used, and the customer signature. Work was completed at the customer’s convenience and in a single trip.

Finally, data from this particular work order is tracked with others in a series of reports and dashboards to help the ATM vendor identify their first-time fix rate, mean time to resolution, technician utilization rates, and more. This helps the vendor further improve their field service performance to increase customer satisfaction.
Managing the vendor lifecycle

Ara is a vendor manager. Although her work can be time-intensive and repetitive, from onboarding new vendors through the point of either contract renewal or termination, she has the added challenge of doing all of her work from home. Customer Service Management and other capabilities of the Now Platform can help simplify Ara’s work, reduce process times, and even empower the vendors to help themselves.

Ara’s first challenge is onboarding. Bringing a new vendor into the fold means exchanging information and forms: contracts to review, revisions to deliberate, agreements to sign, price lists to validate, and more. Rather than work over email (or in person with paper!), Ara uses the service portal to simplify and automate this process. Vendors log in and create a profile for their company that includes all their employees authorized to access the portal—and the vendor can manage that access themselves.

Once onboarding has been completed, the vendor should be assigned a risk tier and complete a formal risk assessment. Strategic vendors typically have access to sensitive systems and data, increasing exposure to risk and compliance issues. The risk assessments that used to take Ara two months can now be done in two weeks, thanks to ServiceNow® Vendor Risk Management. It provides a consistent assessment and remediation process and automates assessment procedures including generating a risk score for each vendor, so Ara can focus on the highest-risk vendors first. The vendor portal consolidates all communication giving Ara an easy way to collaborate with the vendor and address issues quickly, while eliminating email and creating an audit trail for future reference. With Vendor Risk Management, Ara can drive transparency, accountability, and effectively monitor vendor-related risks on an on-going basis.

Vendors can track and complete risk assessments in the Vendor Assessment Portal.
As a vendor works with a company, questions and issues will arise. Ara isn’t the only vendor manager, but she and her team have higher priority work. Instead, they rely on Customer Service Management’s self-service capabilities to provide a first line of assistance. From the portal, vendors can search the knowledge base for company policies. Virtual Agent can provide information like internal contact information. Payment requests can be automated using the Service Catalog.

The Customer Service Portal makes it easy for vendors to find answers or get assistance.

In some cases, the vendor may need to reach out to ask a question or resolve an issue. From the same portal, they can create a case. Workflow assigns the case to Ara or other individuals responsible for that particular vendor or all vendors.

With Customer Service Management, managing vendors has never been easier.

Visit www.servicenow.com/csm to learn more.