What digital workflows are key to Customer Service Management?

What systems are key to digitizing customer workflows when serving external customers?

Digitizing and automating customer service workflows to deliver a seamless user experience requires three key systems:

- **Sales Management** – Used to engage prospects and guide them through the sales process (either direct sales and/or e-commerce) to arrive at an agreed quote and signed contract
- **ERP** – Provides the system of record for sales contracts, orders, fulfillment, billing, and invoices
- **Customer Service Management** – Used to onboard customers, fulfill their requests, and resolve their issues

Questions addressed:

Page 1:
- What systems are key to digitizing customer service workflows when serving external customers?

Page 2:
- How does work flow across Sales Management, ERP, and Customer Service Management Systems?

If you have any questions on this topic or you would like to be a contributor to future ServiceNow best practice content, please contact us.
What digital workflows are key to Customer Service Management? (Cont.)

How does work flow across Sales Management, ERP, and Customer Service Management?

Sales Management:
- **Direct sales** – Displays the sales catalog for product selection, then provides a quote in response to the customer request
- **E-commerce** – Speeds up the sales process by enabling online payment but typically provides less flexibility into product configuration and pricing

ERP:
- Creates and manages products, sales contracts, orders, and invoices

Customer Service Management:
- Onboards customers and contacts, displays a catalog of contracted services, manages the install base of products and services, and enables proactive servicing of issues