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, fulfil their requests, and resolve their issues

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.
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

What digital workflows are key to Customer Service Management? (Cont.)