

Modernize Customer Service Success Map

An overview of implementing, maintaining, and getting maximum value from CSM applications



Now Value: Envision Success Foundations: Critical inputs for successful implementation and maintenance

Vision and value

CSM outcome – Begin to modernize customer service management

Sample KPIs

- CSAT
- NPS: promoters, detractors
- % of cases resolved on first contact
- Average # of agent reassignments
- First response time
- Case average response time

Governance

Special roles added to governance team

- **Customer Service Manager** – Makes customer service process decisions
- **Technical Platform owner** – Makes technical decisions

Foundational ServiceNow apps*

Application scope

- Case
- Customer Service Portal
- Knowledge
- Agent Workspace

OCM and enablement

Owners, process users, and end users of the Customer Service Management application are informed and provided an enablement plan.

Skills and expertise

- CSM applications in scope
- Sources: Now Expert Services, Now-certified CSM partner, Now-certified internal employees (We recommend a combination of internal and other sources.)

Implementation roles

General

- Executive sponsor
- Platform owners (business and technical)
- Process owners
- Project manager
- Business process analyst
- Technical resources (sys admin, developer, tester, architect, security)

Trained in CSM applications

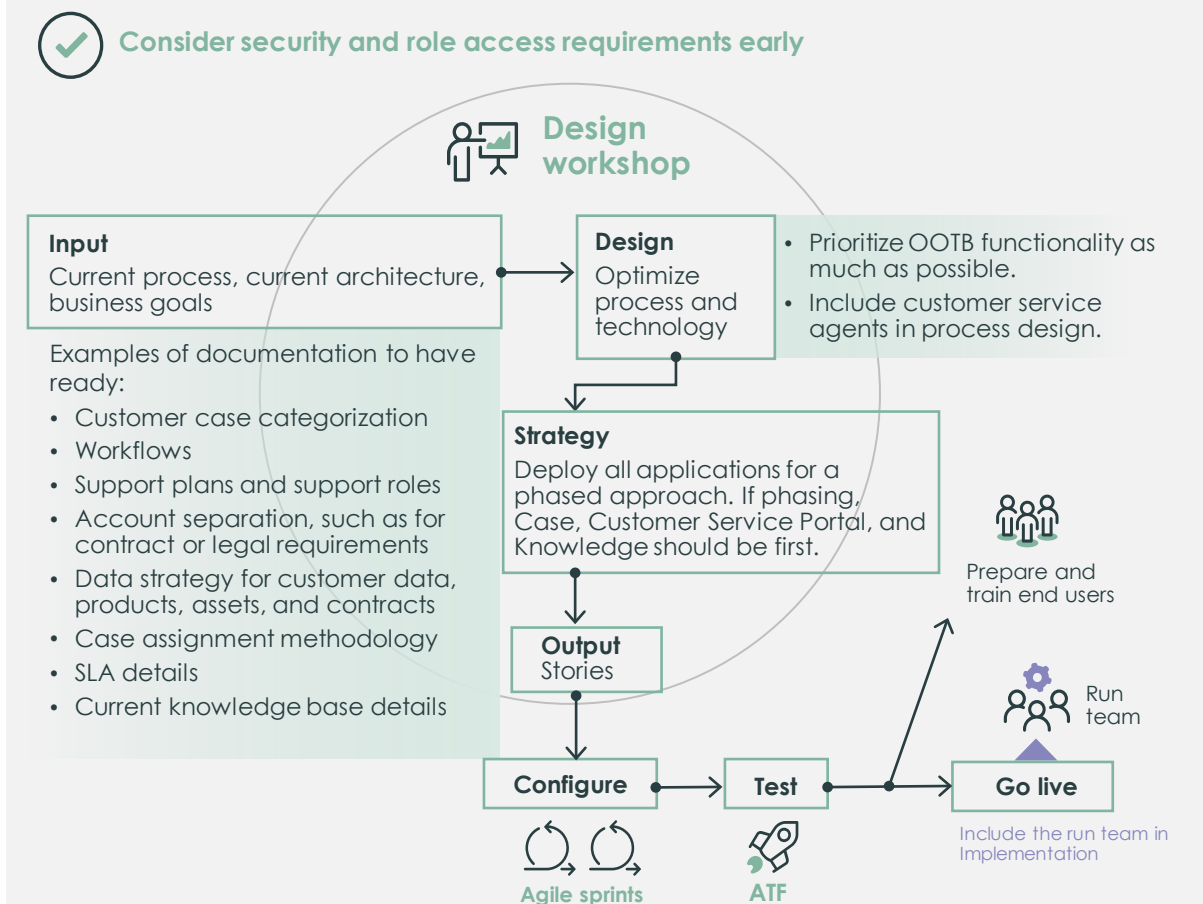
- Customer service manager
- Knowledge owner
- CSM sys admin

Project planning

- Prepare for agile approach
- Use [CSM implementation readiness checklist](#)
- Plan for target value from Customer Service Management applications

Now Value: Create Implement: Implementation activities and best practices

Use **Now Create** to execute implementation.



Now Value: Validate Run: Plan and execute Now Platform® maintenance

Run roles

- CSM sys admin
- Knowledge owner
- Platform owner

Platform health

- **Daily** – Review error logs
- **Weekly** – Review dashboards: Customer Service Executive, Customer Service Manager and Customer Service Agent
- **Monthly** – Review customer service effectiveness and potential future impacts through the CAB

Demand management

Have a process to intake and prioritize services to offer.

Enhancements

Check new CSM apps released in Now Store.

Upgrades

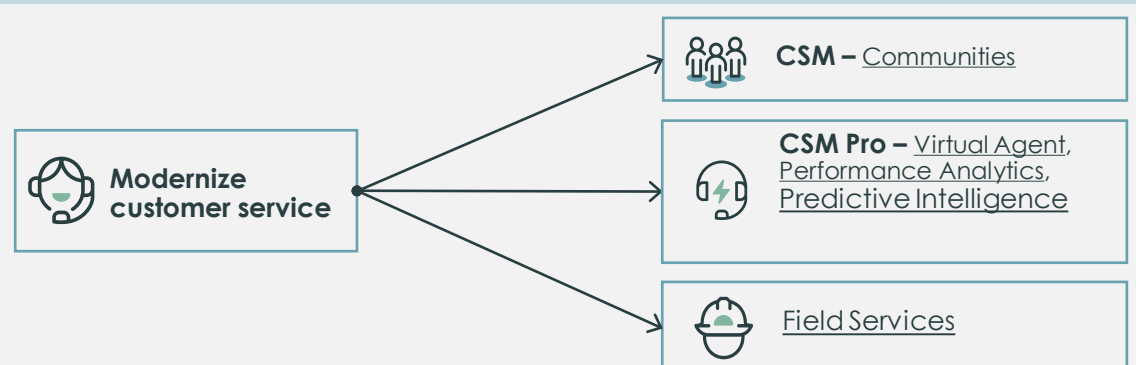
Prioritize OOTB options for existing and new services to ease upgrades.

Assess value

- Are services providing a better customer experience?
- Are services more efficient?
➢ Improved CSAT is a good indicator.

Now Value: Champion Optimize and Expand: Maximize value from your CSM licenses—increase value from the Now Platform®

Consider which CSM applications to implement next.



Consider which Now Platform product suites to implement next.

CSM → IT Service Management (ITSM)

Create or view an incident, problem, change, or request from a case.

CSM → ITOM: Service Mapping

View infrastructure details to quickly identify impacted customers.

CSM → ITOM: Event Management

Create cases proactively from alerts.

CSM → IT Business Management (ITBM)

Provide end users with visibility into their projects and tasks from the Customer Service Portal.

* Foundational applications are for the listed outcome only, other outcomes enabled by CSM may require different foundational applications.