

Customer experience

This Success Insight provides high-level guidance on the people and process impacts for ServiceNow® transformational leaders—including platform owners and executive sponsors—to successfully harness the power of the whole company to serve the customer. This guidance is organized by five business capabilities:



Automate and optimize processes and provide end-to-end visibility

Optimize business processes to make status updates available every step of the way.



Provide proactive service

Resolve issues at scale without any necessary intervention from customers.



Enable customers to self-serve requests without contacting a representative

Allow customers to initiate any request at any time across any devices or channels.



Connect the hybrid workforce and ensure a last-mile customer experience

Create high-quality experiences for activity inside and outside your organization.



Improve the efficiency and accuracy of service dispatch and resolution

Improve the efficiency of field service teams to quickly respond to issues.



Automate and optimize processes with end-to-end visibility

Optimize business processes to make status updates available every step of the way. Take these actions to make sure your teams are ready to provide end to end visibility:

Maximize agent efficiency.

- **Start by undertaking user research.** Conduct workshops with agents across teams to learn about what they need, including their design preferences, what information they use and how they'd prefer that information to be presented when they complete tasks. Likewise, customize Workspace views depending on their responsibilities, seniority, and geographies.
- **Set expectations for teams to proactively search for inefficiencies.** While initial solution designs will add value, continuous improvement is essential to maximizing productivity—and ultimately customer satisfaction—over time.
- **Anticipate team training needs.** Teams may need training on how to best use the new Workspace; productivity, and even operations performance, may dip slightly for a short time during adjustment.

Drive operational resilience.

- **Develop shared goals across teams.** If visibility requires new internal processes and operational groups to work together, consider what shared data and dashboards teams will need to inform how they interact and work together toward common goals.

Establish and communicate incentives.

- **End-to-end visibility of process means end-to-end performance visibility.** Support step-by-step transparency with the step-by-step standards of excellence. For example, share and communicate SLAs with customers as they progress through their service journey.
- **Adjust how you track and measure performance.** Adopt new dashboards to track how successful new processes are at providing end-to-end visibility. Prioritize proactive metrics that track satisfaction with an empowered customer journey instead of those that simply track throughput.



Practitioner insight

Use existing work patterns to identify where you can continuously automate and optimize; observe where teams are currently using spreadsheets and emails instead of a workflow to get work done, and use these as clues on which processes you can digitized first.

Provide proactive service

Resolve issues at scale without any necessary intervention from customers. Take these actions to help prepare your teams for the resulting transformation in proactive service:

Prepare for the changes of proactive service.

- **Focus proactive service on the "moments that matter."** By organizing around the "moments that matter," your proactive service program will target the most critical customer pain points. Task your customer experience function with undertaking customer journey mapping to identify these moments and prioritize those to target.
- **Proactive service is only the beginning of larger end-to-end experience considerations.** Proactive service should be viewed as part of a continuum that coexists alongside self-service and live agent support, with each reinforcing the others.
- **Anticipate the impact of proactive service on internal teams.** Your teams will need to learn about new automation and how it impacts their existing operations, the information that they will have at their disposal (e.g., equipment or services being monitored, location of equipment or service staff), and their operational metrics (e.g., CSAT, time to resolution).
- **Anticipate the impact of proactive service on customers.** You may need to establish new practices and processes to make sure customers are aware of proactive services so they, too, can prepare for the advent of automation in the touchpoints they have with your organization. This could require defining new SLAs and processes to get user feedback.

Support your teams to adopt new capabilities.

- **Break down data siloes.** Machine-based reporting can only be transformative if your company is able to use it. Onboard all device assets onto the Now Platform® to connect critical infrastructure via digital workflows.
- **Socialize the rules for internet of things (IoT) and operational technology (OT) assets.** Ensure frontline employees understand how IoT and OT rules (i.e., configurations for when preventative maintenance is triggered) are evaluated so that they can effectively communicate with customers who have questions about proactive service in practice.

Anticipate cultural impacts.

- **Manage the cultural transition away from break-fix models.** Proactive service requires moving away from break-fix issues to other types of operational incidents that require strategic, tactical, and situational collaboration across teams.



Internet of things

Physical assets that are embedded with sensors, processing ability, and software—among other technologies—that are connected to and exchange data with other devices and systems *primarily over the internet*.



Operational technology

Hardware and software that detects or causes a change, through the direct monitoring and/or control of industrial equipment, assets, processes and events.



Practitioner insight

Many underestimate ensuring alignment on the vision for proactive service. Make sure to embed information on the *what* and the *why* of proactive service in all OCM planning

Enable customers to self-serve requests without contacting a representative

Allow customers to initiate any request, at any time, across any device or channel. Take these actions to prepare your organization to deliver and support these new capabilities:

Prepare for the experience impacts of self-service.

- **Start by understanding your customers' current self-service journey.** Begin by mapping out how customers currently use self-service to understand the current state of how customers accomplish various self-service tasks.
- **Approach customer engagement holistically to support adoption.** Plan to invest in UX design to create a set of interfaces—fit for channel—that will increase the likelihood of customers adopting self-service capabilities.
- **Define the boundaries of self-service.** Self-service is ideal for actions that are well circumscribed and where complexity is low (e.g., updating a profile, subscribing to a new service) and is less appropriate for complex tasks that require heavy subject matter expertise. In these cases, plan on directing customers to the channels best suited for high-touch support.
- **Enhance the cost effectiveness and quality of self-service through analytics.** Reporting on inbound service requests can both provide insight into which kinds of transactions can benefit from deflection as well as which self-service options are performing best.

Invest in customer education and assistance.

- **Self-service is a behavioral change and will take time.** Use incumbent, popular channels (e.g., phone) to remind end users of other ways they can seek support. For example, you can train agents to remind end users about making profile updates from a mobile app, or you can program automated messages to deliver similar instructions when customers are in a virtual queue.

Ready existing support departments.

- **Consider the effects on existing KPIs.** Changing the support model will almost certainly alter how support teams' performance is measured and what's acceptable from a customer touchpoint.
- **Consider the effects on your talent strategy.** Both automation and the deflection of routine customer transactions will leave frontline workers with more complex tasks and the need for staff that can execute these effectively.
- **Prepare support teams for the trade-offs between different support channels.** Support teams will want to know about some of the limitations of the self-service capabilities that end users can use so they can better predict the challenges that might arise.



Support channel mix

Omni-channel capabilities for customer service management often include a combination of:

- Messaging
- Web
- Chat
- Email
- Phone
- Social media
- Walk-up experiences



Practitioner insight

Demonstrating the advantages of self-service (e.g., wait time forecasts between chat and phone) will increase the likelihood that customers enjoy their self-service interactions and use them again in the future.

Connect the hybrid workforce and ensure a last-mile customer experience

Ensure high-quality experiences for activity inside and outside your organization. Take these actions to make sure your teams are ready to create a unified experience:

Prepare third parties for operational excellence.

- **Create systems of accountability across third parties.** Build a common charter and set of values between your organization and third parties to ensure consistency across the customer journey. These charters are an important way to socialize norms on what you expect and what your partners should expect from you.
- **Prioritize bilateral reporting to ensure process rigor.** Remember that agreements on items such as SLAs and customer satisfaction can vary between what you set internally and what a third party has set with you. It's critical to be certain that you use a common standard to meet the internal standards you set with your customers.
- **Invest in data maintenance when dealing with third parties.** Put policies in place to refresh data about third parties and their respective employees to protect your organization from downstream attrition with contractors and subcontractors that these partners may have.
- **Identify opportunities to delegate activities to third parties to streamline operations and management.** Partner responsibilities tend to revolve around viewing task details, assigning work, and tracking progress, all of which third parties can own themselves. This can not only improve effectiveness because the partner will have better, local knowledge, but it will also encourage a sense of ownership over those segments of the service journey they're responsible for.
- **Develop an understudy system to accommodate absences in third-party management.** It may be most efficient to have a single internal manager assigned per partner organization. But when someone is absent, it's important to have other internal staff ready to step in when a partner needs urgent assistance.

Normalize continuous improvement.

- **Create maps that show where and how third parties are involved in the service journey.** By connecting the dots on the touchpoints that partners have within a customer's journey, your organization can identify—ahead of time—where certain vulnerabilities might exist and circumvent them.
- **Use dashboards to monitor performance.** Regularly review third parties' performance using dashboards. This gives you a holistic view of how partner agents are doing with respect to work and establishes an evidence-based approach to delivering feedback.



Improve the efficiency and accuracy of service dispatch and resolution

Improve the efficiency of field service teams to quickly respond to issues. Take these actions to make sure your teams are ready to delivery world-class field service delivery:

Emphasize practicality over orthodoxy.

- **Don't fear role fluidity.** Think critically about how your organizational talent aligns to specific responsibilities. A single individual won't always represent a single role. In fact, in many organizations, it's most efficient to have a single person own the duties typically ascribed to initiators, qualifiers, and dispatchers.
- **One size won't fit all.** Not all field service teams run identically. There are nuances between territories and the skill sets that reside in each, which impacts the assumptions that underpin the ranking and routing logic of work orders to field agents.

Support change management efforts.

- **Prioritize the mobile experience for field service agents.** It's entirely possible that an agent may never interact with a browser version of ServiceNow. As a result, invest heavily in training both those agents as well as their support teams in using mobile technologies to do what they previously did through analog means.
- **Pay attention to branding's role in adoption.** Increase adoption by making the mobile technologies that field service teams use look and feel like your organization's existing infrastructure. This can have a true impact in building comfort and familiarity for those using what may be new, mobile technology.

Collaborate with impacted product teams.

- **Where inventory management resides is a shared choice.** Collaborate with the product owners of other ERP solutions about any decision on how and where asset inventories are managed. Do this early, well before you begin implementation.

