knowledge17

http://clabs.link/lab132016

WORK at LIGHTSPEED

Deliver Superior Customer Service

Jeff Hoffman
Advisory Solution Architect
ServiceNow

Rich Runfola
Advisory Solution Architect
ServiceNow

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servicenow

Speaker Introduction



Name: Jeff Hoffman

Title: Advisory Solution Architect

Company: ServiceNow

Experience: 16 yrs in CRM and Service Management (ServiceNow, Oracle, RightNow Technologies, CHR Solutions)

Achievements: Worked with multiple Fortune 500 companies to transform Customer Experience and Customer Service operations.

Based in the Pacific Northwest with my wife (Kelli) and 3 kids, ages 6, 4, and 2.

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Speaker Introduction



Name: Rich Runfola

Title: Advisory Solution Architect

Company: ServiceNow

Experience: Over 15 years in Customer Service and Business Process Management (ServiceNow, Pegasystems, Appian)

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Objectives and What You Will Learn

Objectives

- This lab will walk you through the process of configuring Customer Service Management for managing customer requests and creating automated skills based assignment for both B2B and B2C Customers

What you will learn

- Concepts behind Agents, Groups, Skills, and how work gets assigned
- How to manage Customer Accounts, Contracts, and Entitlements
- Extending Customer Service to your Service Portal for automating product registrations and case creation.

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ServiceNow Customer Service Management

Effortless

Automate and
personalize self-service

Connected



Assign and
resolve issues

Proactive



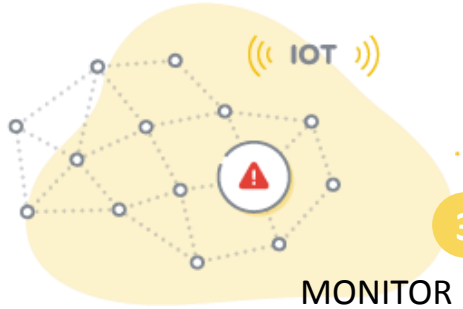
Monitor and
prevent issues

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How to Resolve Customer Issues at Lightspeed

3

- Internet of Things for issue monitoring and management
- Auto-creation of cases



3

MONITOR FOR ISSUES AND CREATE CASES AUTOMATICALLY

4

- Visual task board, workflow/automation for task assignment to drive accountability to field service, engineering, finance and other departments

REDUCE CASE VOLUME WITH SELF-SERVICE

2

- Self-service
- Personalized portal
- Service catalog
- Knowledgebase
- Social Q&A
- Workflow/automation



1

MAKE IT EASY FOR CUSTOMERS TO ENGAGE



5

PREVENT FUTURE CALLS



4

ASSIGN TASKS ACROSS THE ENTERPRISE

1

- Omni-channel: Email, phone, chat, social media, mobile
- Intelligent case routing
- Contact center management

5

- Problem and change management for underlying issue resolution
- Targeted communications for preemptive notifications
- Performance Analytics to act on trends

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Today's Lab Scenario for Delivering Great Customer Experiences

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CSM Releases: From Geneva Through Istanbul

Geneva Features

Case Management	SLA (for Cases)
Customer Account (B2B)	Email
Partner Account	Phone (OpenFrame)
Customer / Partner Contact	Customer Portal
Product	Customer Chat
Customer Assets	Routing & Assignment
Service Contract	CSAT Surveys
Entitlement	Service Analytics

Helsinki Features

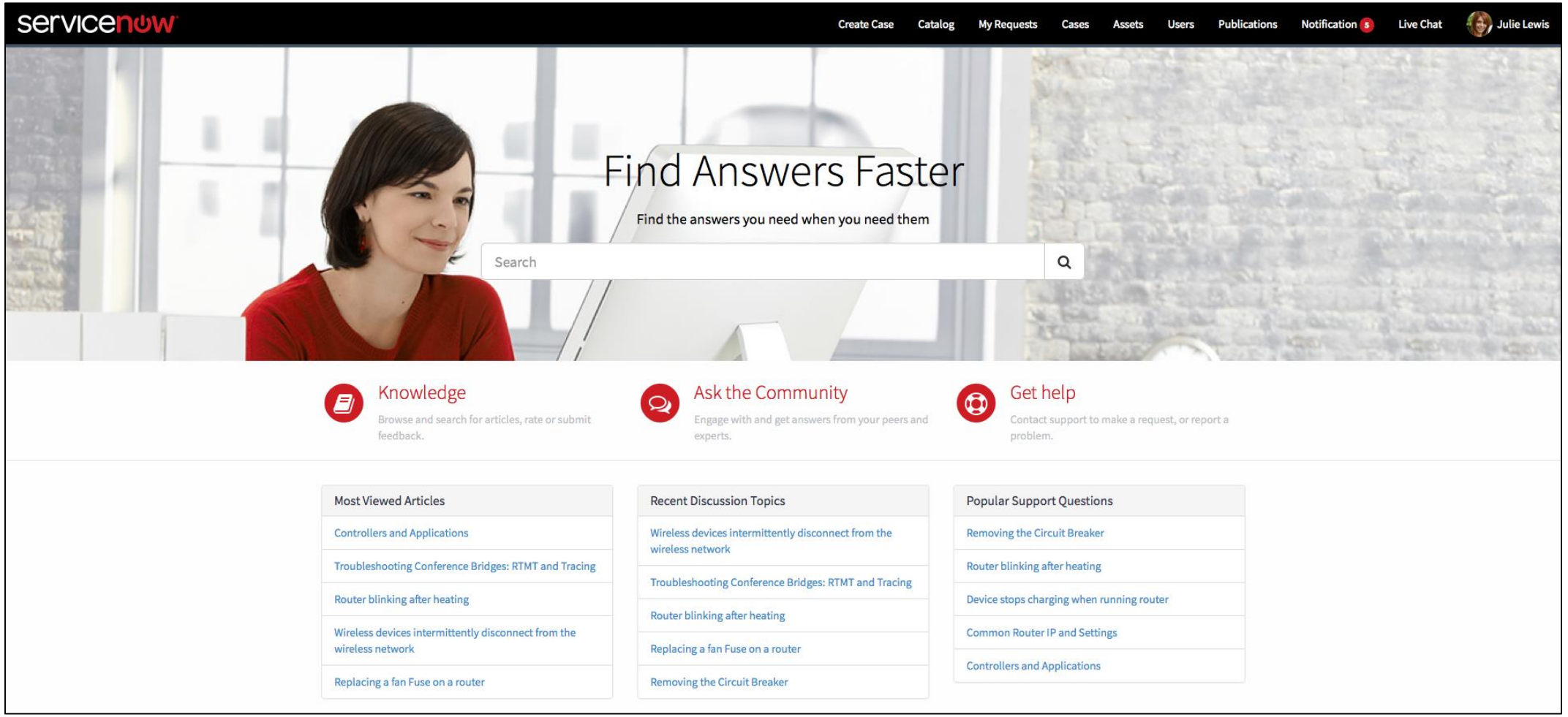
Enhanced Account Management (hierarchy, relationships)	Portal Customer Self-Administrator (approve, disable, assign)
Account Teams	Portal Self-Registration
Agent Special Handling Notes	Field Service Central Dispatch
Asset Contact Relationship & Access Control	Targeted Communications

Istanbul Features

Consumer Account (B2C)	Enhanced Case Assignment
Consumer Service Portal	Field Service Integration to PPM
Anonymous Chat	Field Service Signature Capture
Chat Routing	Field Service Work Order PDF Summary
Social Media Integration Support	Order support Scenarios

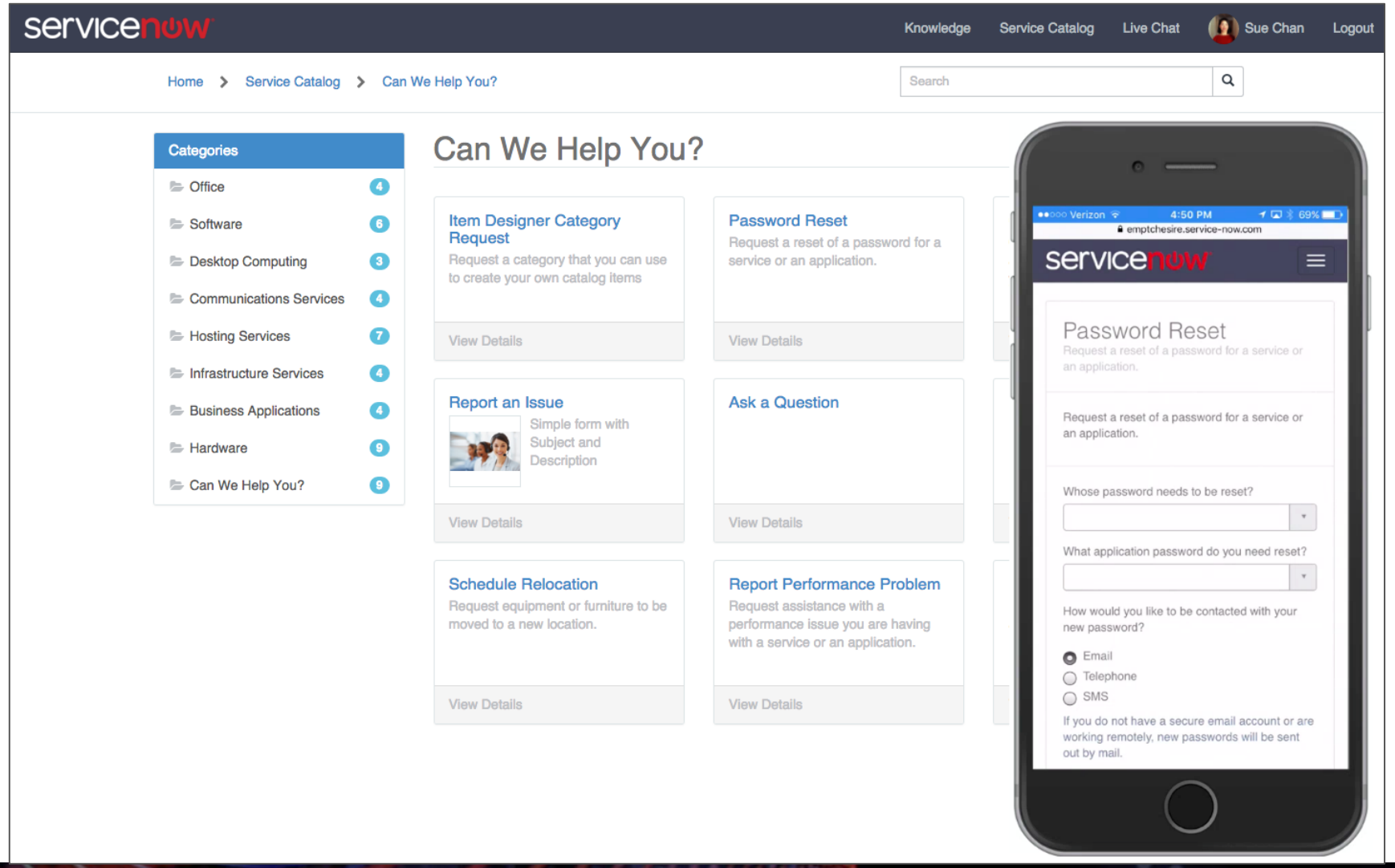
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Power Self-Service Through Customer Portal



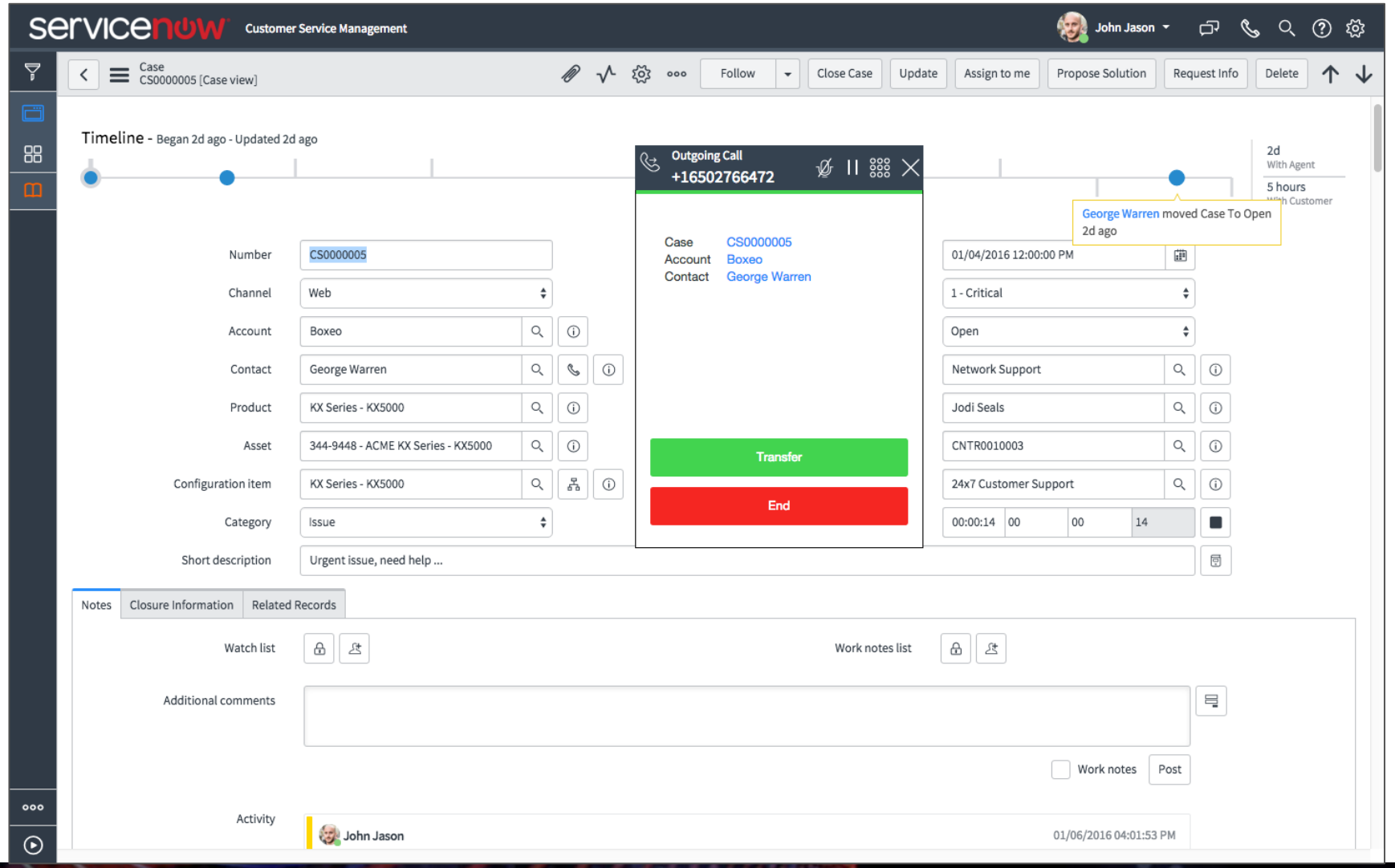
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Automate Repetitive Requests as Self-Service Catalogs



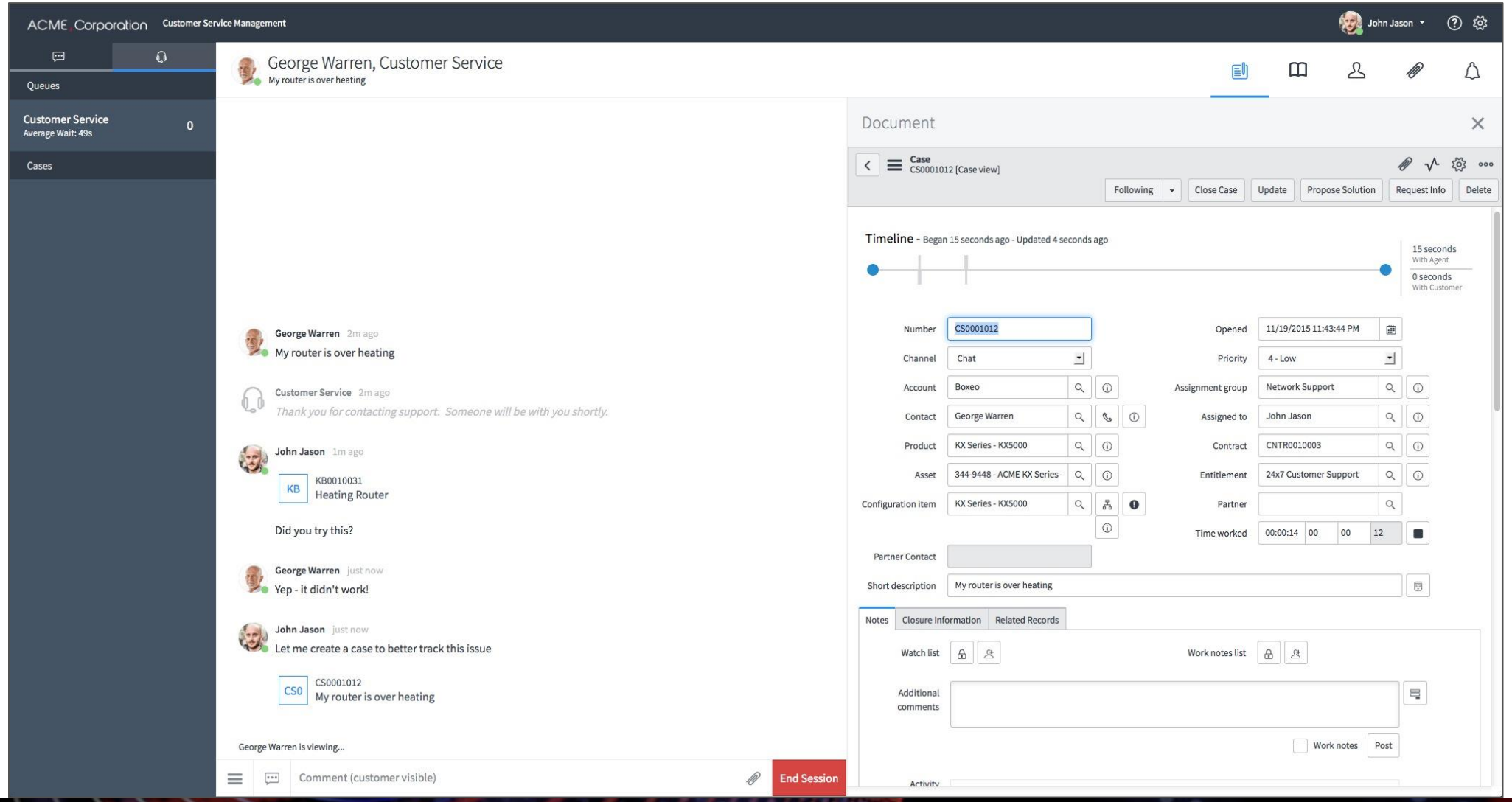
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Deliver Omni-Channel Customer Engagement



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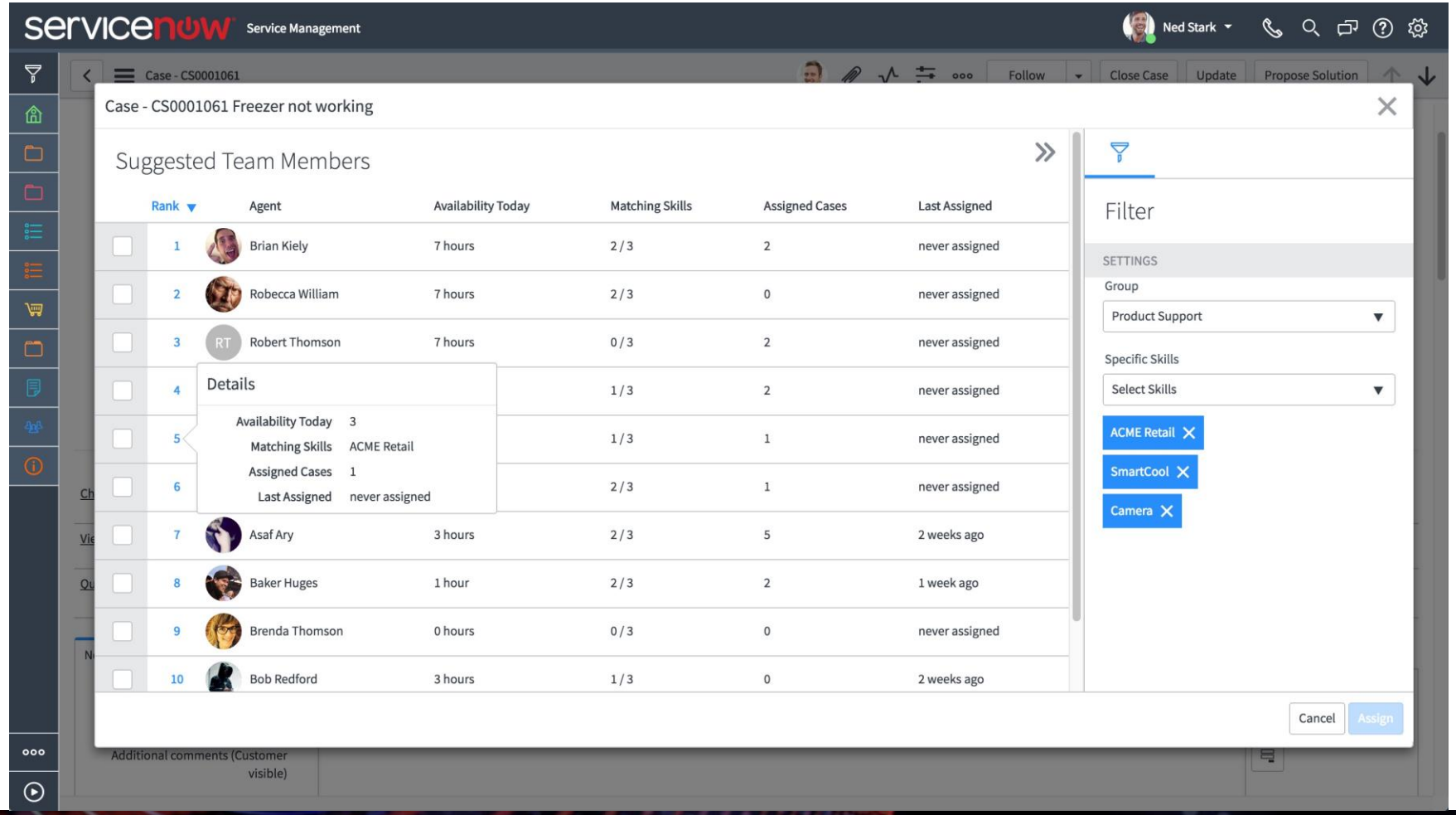
Collaborate in Real-Time with Customers and Teams



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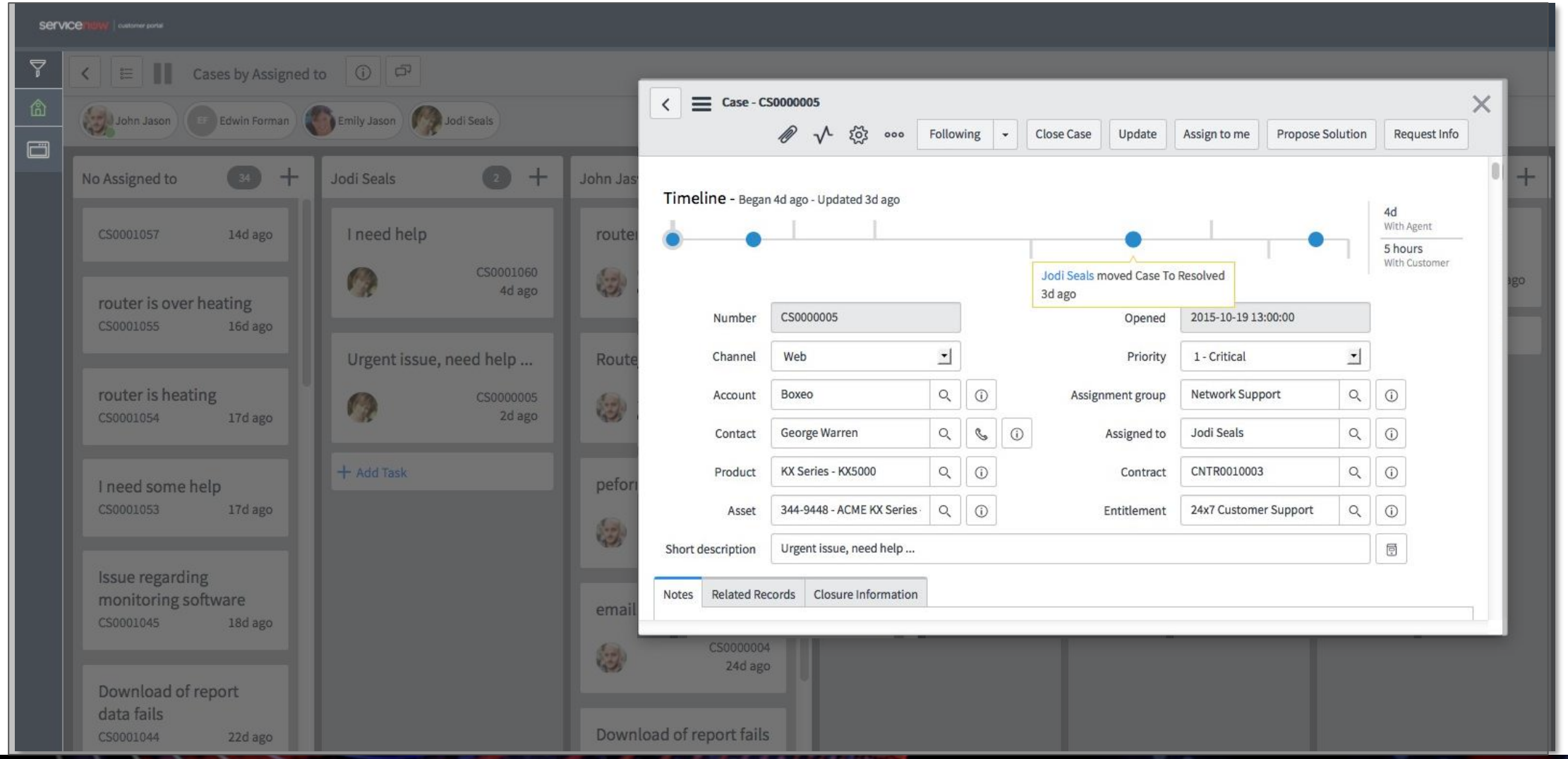
Automate with Intelligent Case Assignment

Expedite the request process by automating case assignment based on pre-defined criteria.



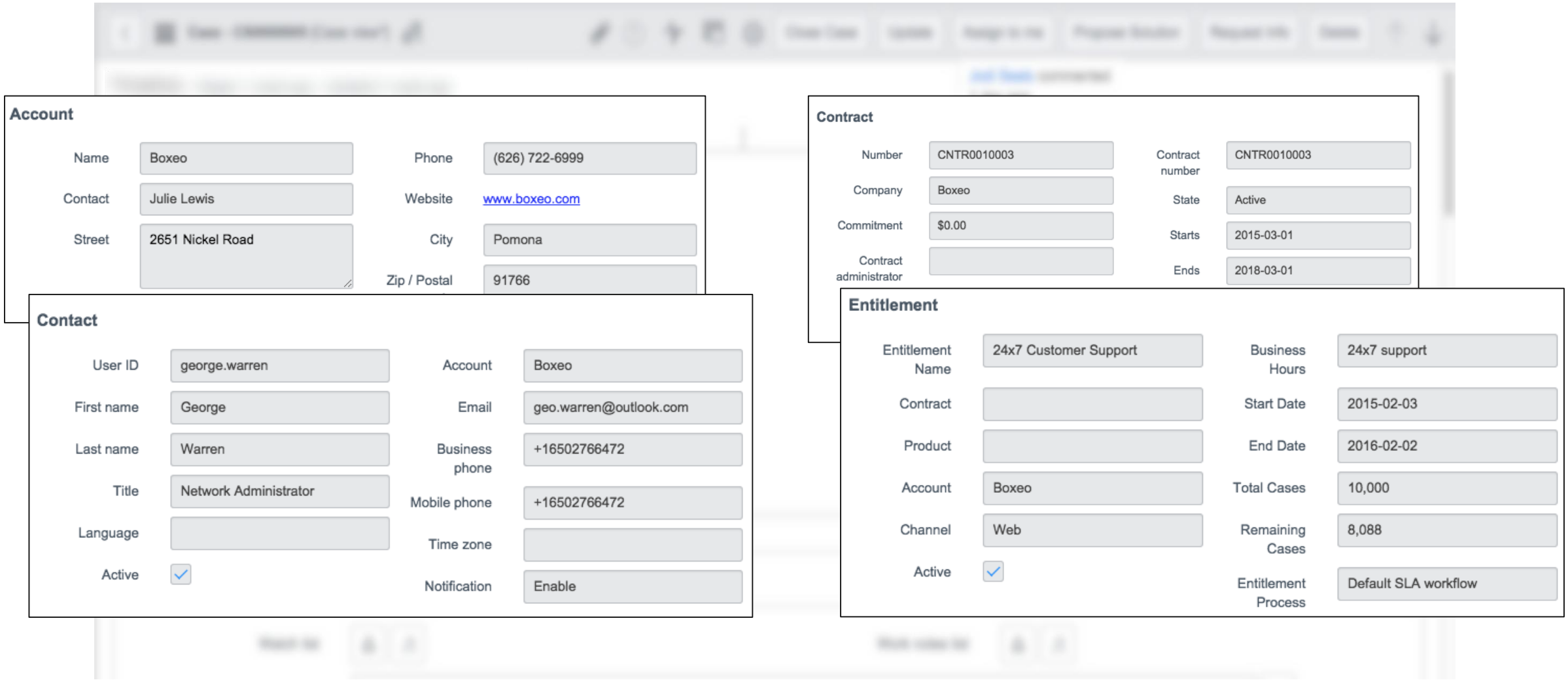
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Analyze Case History and Take Resolution Steps



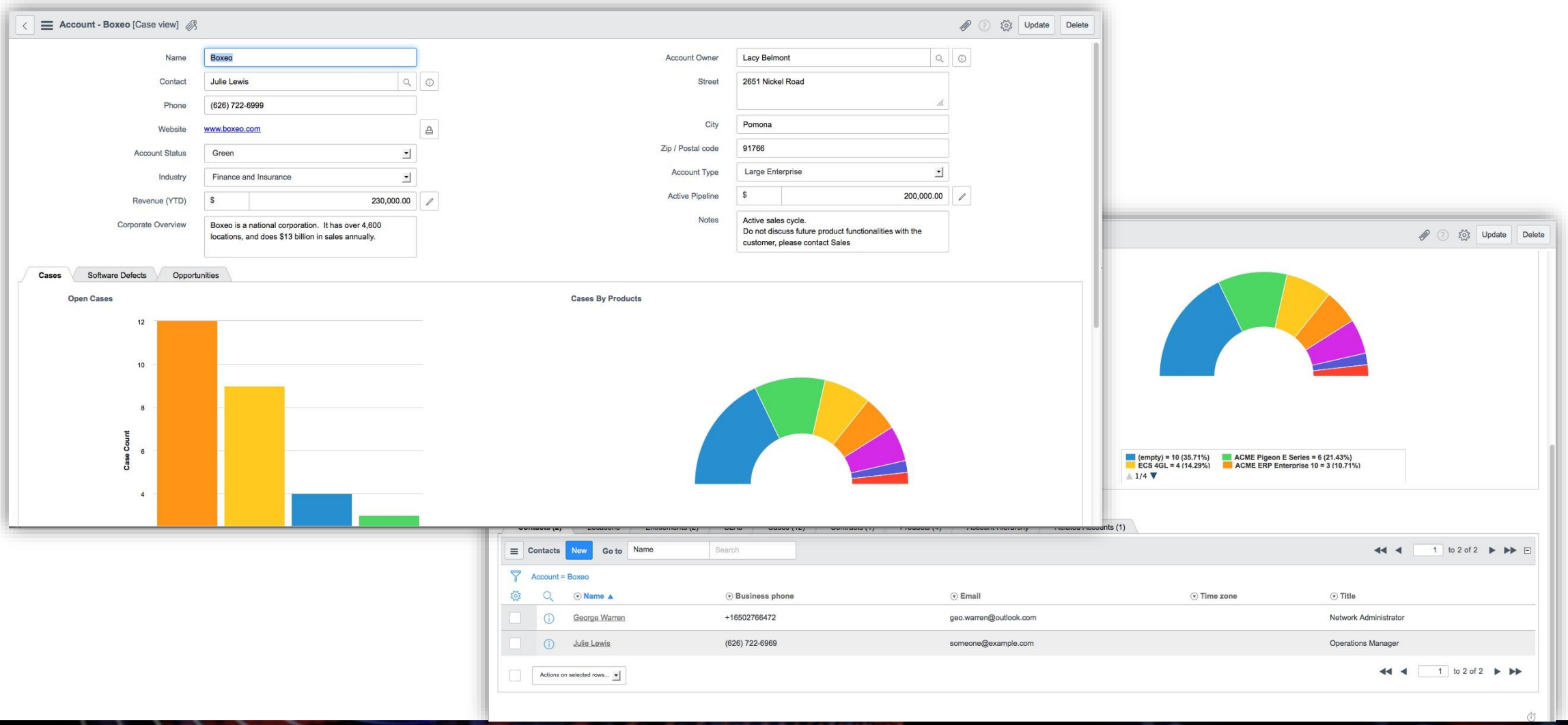
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Meet Commitments through Integrated Contracts and Entitlements



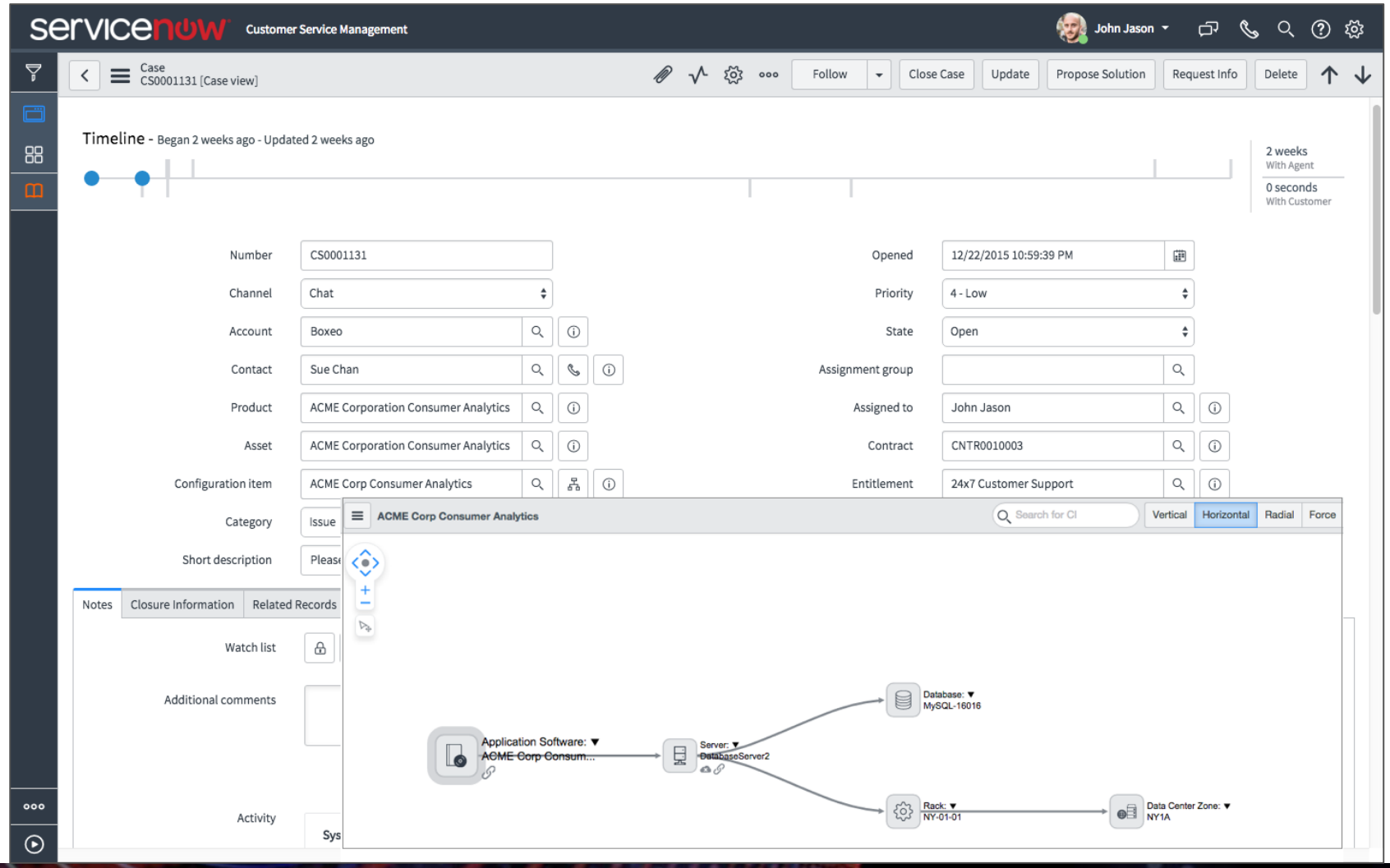
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Get Account 360 View



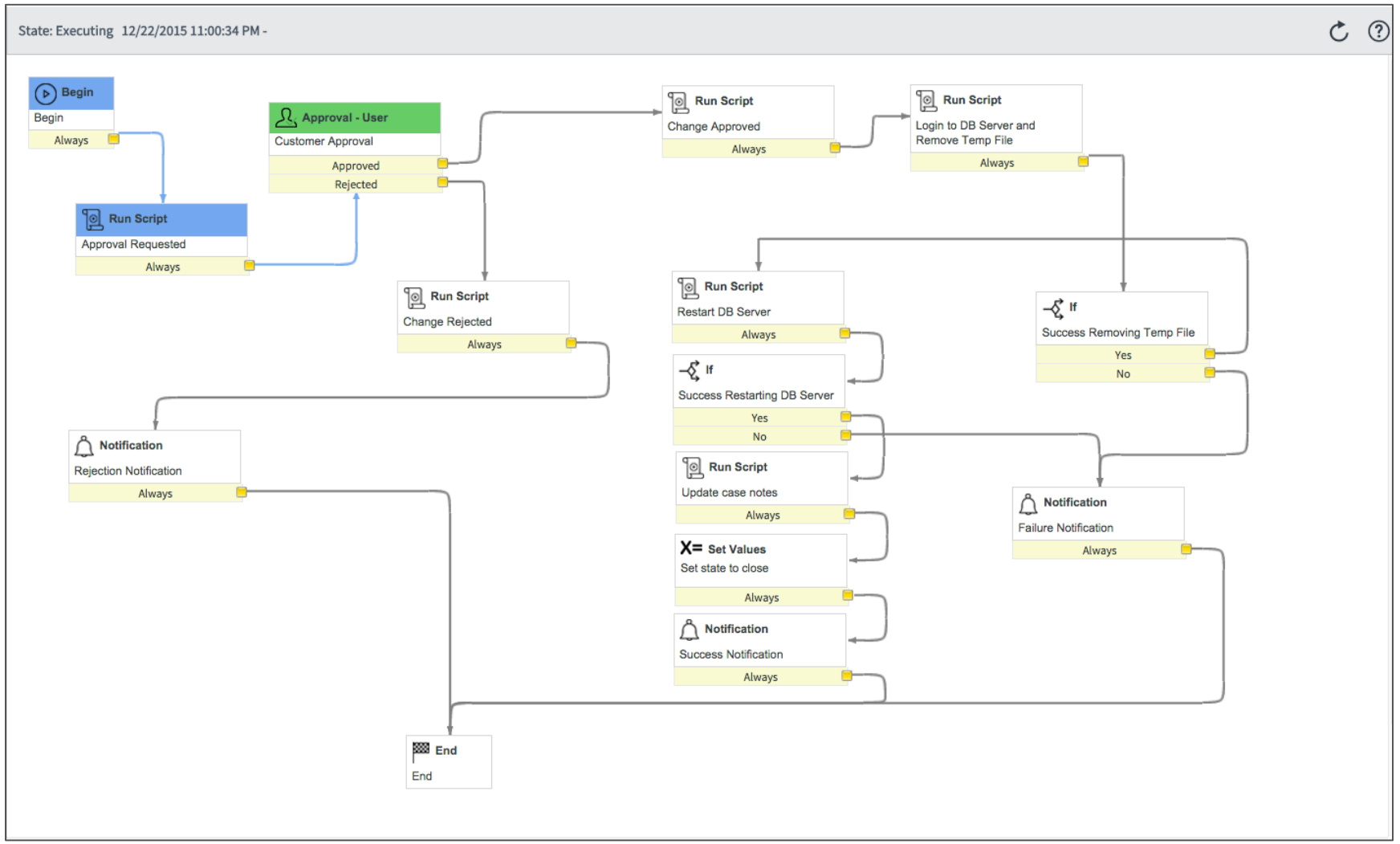
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Visualize Real-Time Health of Customer's Install Base



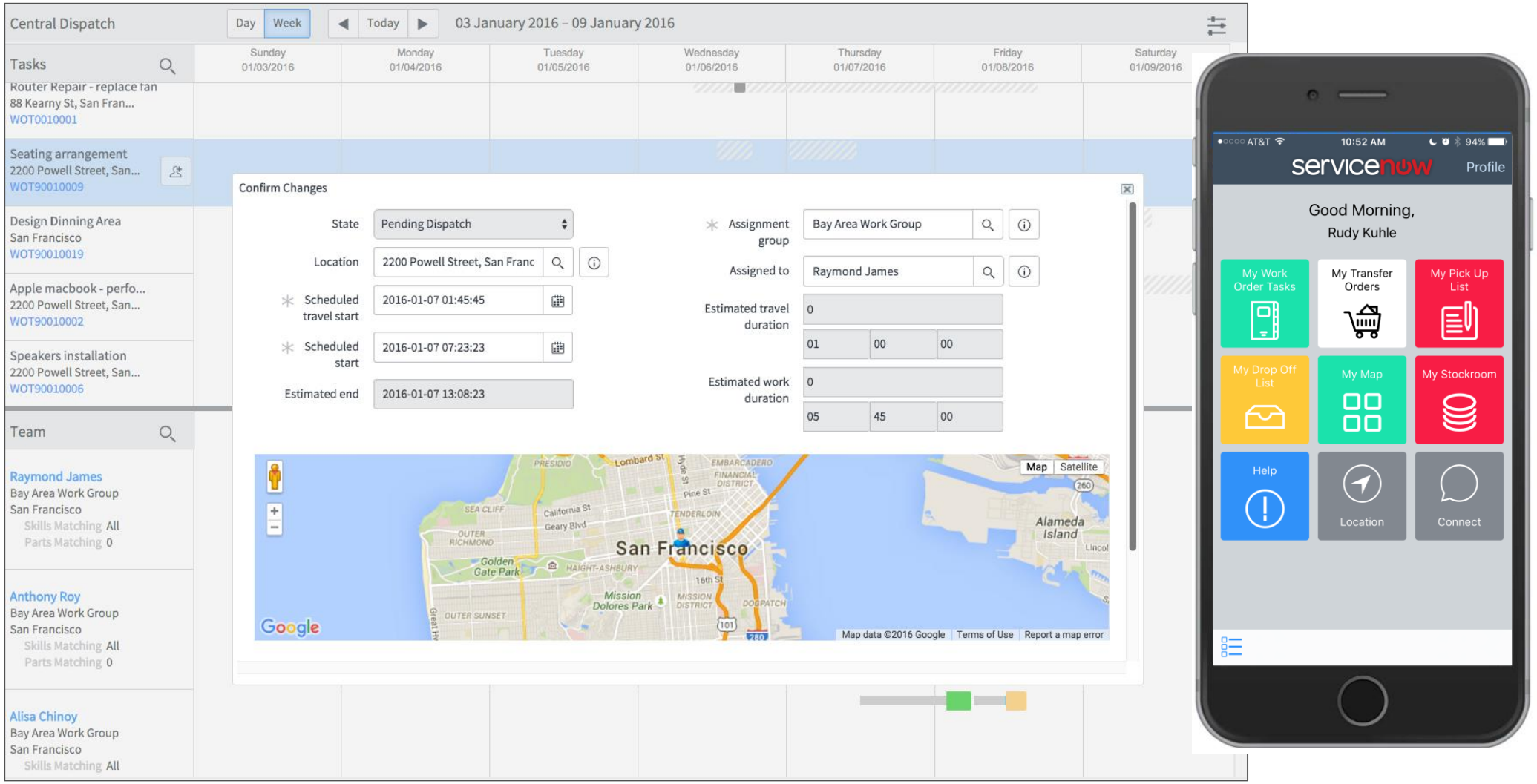
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Automate Work Through Powerful Workflows



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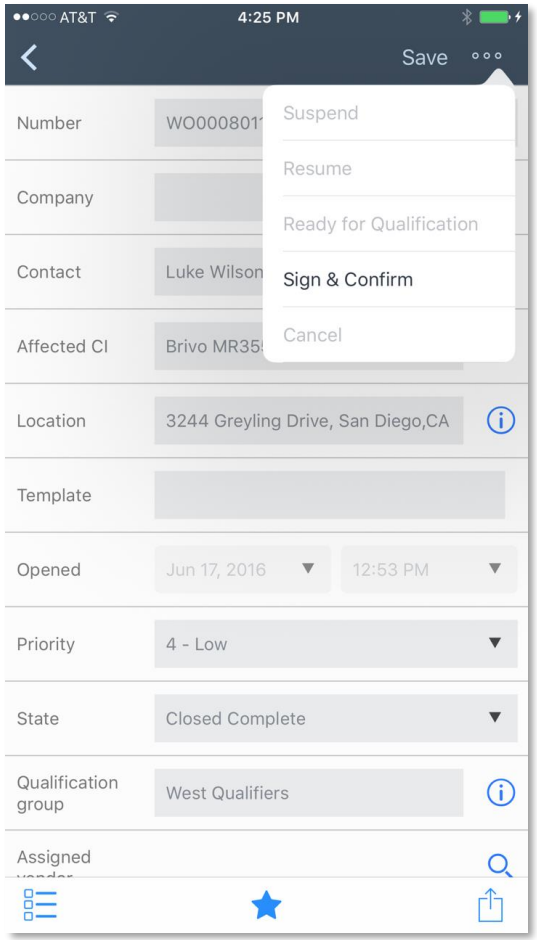
Drive Integrated Field Service Operations

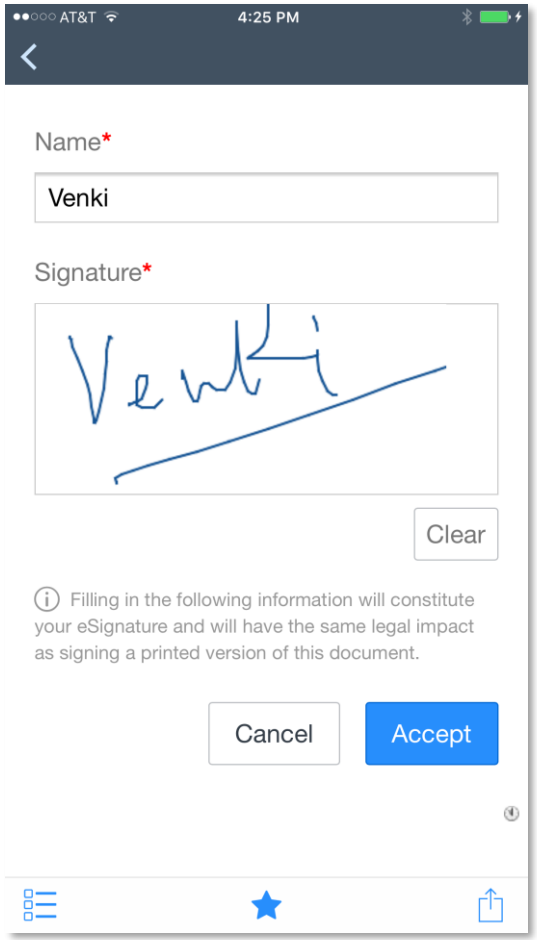


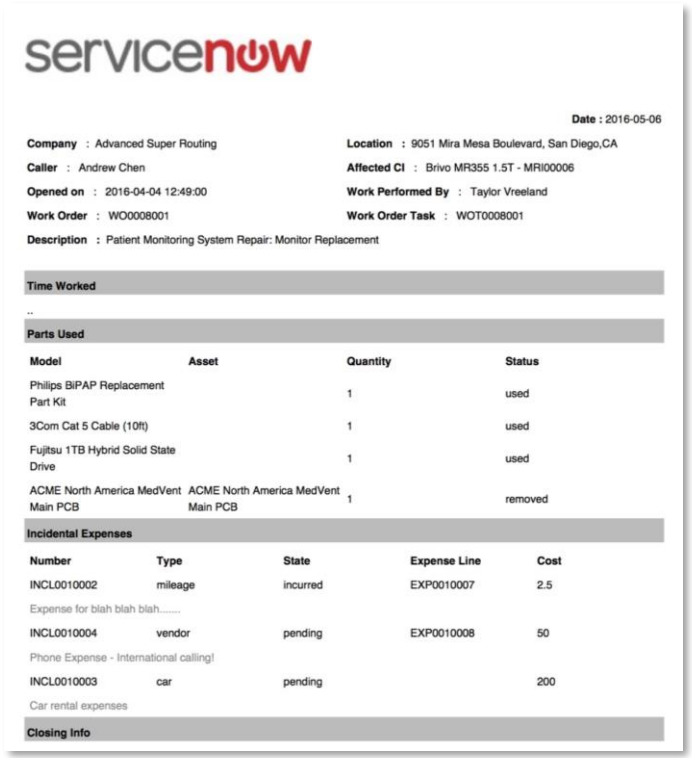
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Field Service: Capture Signatures and Present Work Orders

Streamline customer acknowledgements and work order summary creation.







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Anticipate and Respond to KPI Trends



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Lab Agenda

- Lab 1.0: The Basics of Roles, Groups and Skills
- Lab 2.0: Skills Based Routing
- Lab 3.0: Account Set Up
- Lab 4.0: Configure Product Registration
- Lab 5.0: Creating a Record Producer

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Lab 1.0 (page 3) – 10 minutes

This lab explains how to set up the Users, Roles, and Skills for your CSM ServiceNow application.

Roles are defined for CSM team members, and define their responsibilities in the Customer Service department

Groups are used to further divide your Customer Service department (e.g., product, region, tier, etc.)

Skills define specialized Customer Service employee knowledge

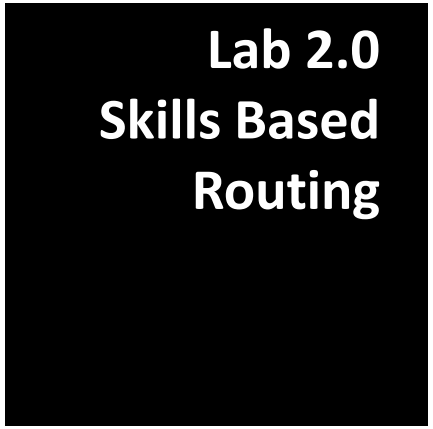
Lab 1.0
The Basics: Roles, Groups and Skills

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Lab 2.0 (page 12) – 10 minutes

This lab explains how to set up and configure Cases requiring a specific skill or assignment rule to route to the proper Agent.

- Map the assignment group and agent to the newly created skill.

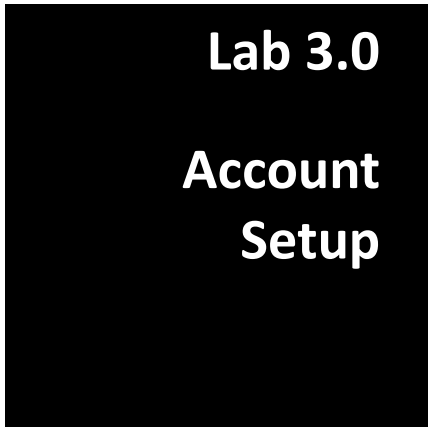


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Lab 3.0 (page 17) – 20 minutes

This lab explains how to set up and configure an Account:

- Create Contacts, Contract, Entitlement and Support Team



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Lab 4.0 (page 24) – 20 minutes

This lab explains how to configure the Product Registration process for the Consumer Service Portal

- Add a new Product Model available for registration
- Register a Product to a Consumer



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Lab 5.0 (page 33) – 10 minutes

This lab explains how to set up and configure the CSM Properties in the property administration page. We will also address any outstanding questions or topics that come up along the way.

- Special Handling Notes
- Account Relationship Types



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Key Takeaways

1

Customer Service must provide an easy means for customers to voice their issues and concerns – and the business must make sure that issue is routed to the right team or agent.

Effortless

2

In a connected world where IoT is everywhere, Support teams must have real time visibility across systems to effectively service their customers. What can you automate using Service Catalog?

Connected

3

By presenting information proactively to customers, agents, and other team members, you can make customer service a Team Sport and bring the organization together.

Proactive

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Thank You

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Jeff Hoffman
Advisory Solution Architect
ServiceNow

Rich Runfola
Advisory Solution Architect
ServiceNow

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Q & A

Jeff Hoffman
Advisory Solution Architect
ServiceNow

Rich Runfola
Advisory Solution Architect
ServiceNow

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