

Every Customer Service Organization in the world essentially has two objectives at the core of all its operations – Increase Customer Satisfaction; while simultaneously decreasing the cost of doing so.

ServiceNow Customer Service Management (CSM) tool offers a solution for this challenge through the following robust features:

1. End to end workflow management and intelligent routing for the intake, triaging and resolution of customer cases
2. Omni channel support – allowing customers to choose the communication channel with which they engage with the organization
3. Customer Self Service driven by Knowledge Management for the most frequently addressed requests
4. Comprehensive case resolution through Integration with other ServiceNow applications like Event Management, Facilities, Problem and Change Management, Asset Management and Portfolio Project Management
5. Empower customer service agents by alerting them when events occur and configuring rules-based special handling instructions

“Sounds great,” you say. “But where do I start?”

PASS 1: Build foundation capabilities for your CSM Agents

PASS 2: Enable Customer Self Service

PASS 3: Integrate with other systems and enable real-time collaboration

PASS 4: Enhance Customer Interaction

Approach:

INRY has a proprietary delivery methodology called Process Area Specific Sprints (PASS). This methodology relies on a combination of AGILE® and PRINCE2® methodologies. PASS is designed to rapidly deploy and introduce ServiceNow functionality into the organization's departments with a targeted focus. Clients are engaged throughout the delivery cycle; and rapidly start using the functionality developed. Each PASS lasts between 6 to 8 weeks.

The main benefit of this approach is that you avoid long systems implementation cycles and the “black box” approach – where you only see the benefits of the



system after a long SDLC cycle and users interact with the application only during UAT or after go-live

Through the PASS approach – organizations can quickly and incrementally build their capabilities and iteratively provide smarter requirements for future PASSes. Our team has demonstrated success in managing and implementing the methodology across various ServiceNow applications for both IT Service Management (ITSM, IT Operations Management) as well as Business Service Management (Human Resources, Finance Service Management, Facilities Service Management etc.)

To achieve the entire portfolio of functionality offered by ServiceNow®, and to leverage the art of the possible, we recommend a four-PASS process.

Regardless of whether you're building your Customer Service Management capability afresh with ServiceNow CSM or migrating from a legacy application, there are some core set up activities that need to be performed.

This includes activating ServiceNow instances; setting up core elements like users, roles and groups; setting up customer information; and configuring a Service Catalog – which defines the types of services your customers are likely to request. At first glance, this might look like a lot of effort. However, ServiceNow's robust and highly configurable platform capabilities make the foundational step relatively easy.

Four Easy Steps To Implement Customer Service Management With ServiceNow

In this preliminary step, you can set up basic administrative functionality like using rules to route and assign cases and start to track and analyze customer service trends and metrics. ServiceNow's intelligent routing capabilities allow you to assign cases to agents based on skills, availability, workload, priority, geography and other similar criteria.

At this stage, we also recommend you initiate a Knowledge Base and start developing content which can be used by agents. Once your back-end CSM operations have been enabled, it's time to enable omni channel engagement and develop a self-service portal.

Some organizations attempt to do both step 1 and 2 at the same time. This is feasible if you're migrating from a legacy application and you already have intelligence around Customer Service patterns and how you can automate frequently requested services. At this stage you can provide common request automation as well as other self-service options for your customers through a knowledge base as well as social collaboration.

When that's set up, turn on customer feedback surveys. Customers can receive notifications to complete surveys when requests are closed. These are a valuable tool to collect information and insights into the efficiency of your CSM implementation

ServiceNow also provides capabilities to support mobile devices.

There are two prongs to this PASS.

The first is to provide your agents with visibility into defects and orders without involving the "swivel chair" effect; where they are forced to log into multiple applications or systems and search for information.

The second is to "push" event based knowledge and notifications to the agents and your customers. For example, integration with ServiceNow Event Management can alert agents to be aware of service outages. These alerts can also be "pushed" to the Customer Self Service Portals as "Announcements" which can result in a significant reduction of customer service requests pertaining to the outage.

Integrating with Change and Problem Management can enable Customer Service Agents to automate creation of change requests; and enable your organization to identify and track root causes of problems.

This integration can also assist with cross-department collaboration within your organization. Customer Service usually requires several departments to work in tandem and this capability helps with the acceleration of issue identification and resolution.

There are two types of reports in the world – the first provide data and the second type provide insight – and they're both very valuable.

For Customer Service Management capability – data driven reports that capture metrics like SLA adherence, time to resolution, first contact resolution percentages, aging etc., are valuable to manage operations, and these are enabled in the Foundation PASS.

The second type of reporting – dashboards that help visualize trends and drive insights – only become meaningful after the system has been in use for a while. Which is why we recommend returning to them in the fourth and final PASS. At this time you should revisit the dashboards to refine them based on the learnings from using the system through the previous PASSes and identify metrics and visualization is meaningful and assists in one of the two core objectives we started with. The metrics should either assist with improving Customer Satisfaction; or decreasing cost of services.

By analyzing the dashboards and the trends they provide, you embark upon a process of enhancements and refinements that can help make customer self-service more robust.

Conclusion:

Implementing Customer Service Management can appear to be a daunting and uphill task but with ServiceNow CSM and the INRY PASS methodology, you have opportunities to accelerate the process and build the capability in four easy PASSes.

For further information regarding our approach, or to know more about ServiceNow's CSM capabilities, please contact us at info@inry.com. We're here to help.

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