

Key Considerations When Implementing ServiceNow CSM For Mature & Evolving Organizations

Organizations that are considering implementing ServiceNow Customer Service Management (CSM) solution tend to fall into one of two buckets:

A. Mature Organizations

These are organizations that already have a network of systems and processes that have been refined over time to support their CSM initiatives. These organizations are typically considering ServiceNow CSM to assist them in either replacing end of life systems, or to develop customer self-service capabilities and assist with getting to the next step in their maturity model.

B. Evolving organizations

These are organizations that have a relatively newer CSM department and are considering ServiceNow to help them migrate from using manual processes managed through antiquated systems like Excel or homegrown applications.

This paper explores challenges and considerations that are unique to either category. While some of the considerations discussed here may apply to both types of organizations, you must evaluate which of these two types of organization you are.

For the purposes of this article, we are defining Mature Organizations as entities that have mature processes, have been collecting customer feedback and are aware of the capability gaps in their organization and ServiceNow forms a part of their strategy to overcome them. It is entirely possible for large enterprise level companies to have evolving CSM organizations; just as it is possible for Startups to be Mature.

A. Mature Organizations

If you have determined that you are an organization that is looking to move from mature systems, it is highly likely that your CSM systems started out as ticketing tools and their core strength is in opening, routing, managing and closing service tickets. It is highly likely that you have evolved from having call centers built around taking phone calls, and progressed over time to integrate emails and web chat sessions.

Typically in organizations like these, there is a huge "system" culture and inertia built around tracking customer responses. These systems are usually pretty good at customer communication and the next step, and probably the reason for considering ServiceNow, is for them to evolve into an integrated world. For example, enabling Customer Self-Service; or integrating their Customer Service ticketing to their Field Service Management or Problem Management systems. It is likely that their incident categorization and everything in their CSM organization is tailored towards staffing and managing a call center, but there is a realization that it is more valuable to evolve towards resolving root cause.

Top considerations for these organizations are as follows:

- 1. Change management:**

Due to the deep rooted "system" culture, and potentially decades of doing things a certain way, following certain processes, and plugging capability gaps through manpower rather than application enhancements, they have built silos of knowledge and are reliant on a few key people to "keep things going". End user and customer adoption are key success criteria for CSM implementations, and these organizations will need to be prepared to expend effort on change management.

2. Key Drivers:

Another consideration is that you need a compelling event or driver that will energize the organization to make a change to a new platform like ServiceNow. It is highly possible that your leadership is considering ServiceNow CSM because its already being used for other parts of the organization like IT Service Management or HR Service Management. This might lead to a common end-user theme, “why fix something that isn’t broken.”

It is key to understand and communicate that if these organizations don’t evolve from ticketing to a more integrated world, your customer service will continue to be a “complain management” organization. This has the potential to lead to strategic challenges such as –

- a) becoming outpaced by competition, particularly with all the current emphasis in the marketplace on self-service and “consumerized” service organizations
- b) losing the opportunity to use insights from customer service management to address root causes of problems
- c) perhaps the biggest consideration for a mature organization: the inability to generate efficiencies by automating workflows and coordinating activities between various departments

3. Selecting the right implementation partner:

Mature organizations usually require an implementation partner who has skills in a broad spectrum of things from ServiceNow to Integrations to Data management etc. The partner needs to be able to understand the challenges and considerations that are unique to your organizations; and have the capability to balance these considerations with best practices. Your implementation partner will need to understand that you know a lot about your internal systems and already have deep-rooted processes – and that the focus is not just on platform enablement, but on configuring the platform in such a way that your existing processes can be supported.

4. Customer Portal:

Mature organizations have a wealth of knowledge amassed over time and this can result in a tendency to overengineer the self-service portal. Biggest requirement here – your organization has lots of people who know lots of things but you need a partner who can “pull” knowledge from different people in different silos and assist with developing a portal that is comprehensive but not complicated.

Requirements gathered in silos and platforms configured without taking the time to consolidate these use cases will result in a portal that detracts from User experience: Redundancies, Repetitions, Complexity and Confusion.

5. Stakeholder Commitment:

This might almost appear to be a cliché – isn’t this important for any initiative? Also, isn’t this a combination of 1 and 2 in this list? True. But that doesn’t mean it’s not relevant here.

It is key for Mature organizations to appropriately plan for people’s time for various phases of the implementation, including design, Integrations development, system testing and user acceptance testing. From the first consideration in this list – we know that there may already be a resistance to the platform. On top of that your key SMEs have day jobs. If their time is not planned effectively and their input incorporated in a timely fashion, you may end up with a system that won’t adequately support their needs and further their resistance to the platform.

Executive sponsorship and commitment from your leadership team, particularly with a compelling driver as discussed in (2) above; and a well-considered benefits case will help remove obstacles and result in a successful implementation.

B. Evolving Organizations

Typically these organizations are planning on using ServiceNow to drive overall improvements and to “elevate their game”. They recognize ServiceNow is built on ITIL and are recognizing that applying the same platform capabilities to Customer Service Management can help them accelerate their programs. These organizations have a focus and drive towards Customer Service Management, and already recognize the need for change.

Top considerations for Evolving Organizations looking to implement ServiceNow CSM are:

1. **Selecting the right implementation partner:**

Evolving organizations need to be aware of a tendency to over engineer. Building too many assignment rules, workflows, processes etc. can complicate the system. They should begin by recognizing that they are trying to solve a Customer Service problem. To begin with, it is important for these organizations to use the application as much out of the box as possible and start off with building foundational capabilities.

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.

Over time, these organizations can “turn on” other capabilities. Follow the four steps laid out in our article, [“Four easy steps to implement ServiceNow CSM”](#)

2. **Integrations:**

The reason ServiceNow platform is exciting is its robust capabilities for comprehensive case resolution through Integration with other ServiceNow applications like Event Management, Facilities, Problem and Change Management, Asset Management and Portfolio Project Management. For organizations that are migrating off manual processes and systems, the urge to integrate and increase efficiency can be overwhelming, particularly if they have the funding to support the end state and the “art of the possible”. However, our recommendation is: don’t overdo integrations. Build the base product, use insights derived from leveraging the platform to identify integrations that are most likely to provide the best benefit and/or result in the most efficiency.

3. **Leveraging Customer Feedback:**

For evolving organizations, there can be an emphatic focus on organizational efficiencies and automation. The tendency is to use operational parameters and adherence to SLAs as KPIs. However, customer trends and traffic patterns on the self-service portal can lead to valuable information, such as understanding how to drive more activities to the self-service portal; how to make knowledge articles more effective; how to enable “one-click” service automation; how to make your catalog more comprehensive; and many other such insights, can result in both customer delight as well as reducing the burden on the Customer Service Agents.

4. **Develop a roadmap. Realize CSM Implementation is a journey, not an event:**

Working to develop a capability roadmap, and revisiting the roadmap periodically to refine it based on ongoing learnings; will ensure that you build a platform that will scale effectively. This is a platform that will evolve and grow with you over several years. It won’t be a “one and done” implementation – as your maturity evolves, so will your platform. It should, if it is done right. Select an implementation partner who focuses on platform enablement and can guide you through developing the roadmap as well as performing the configuration – the right partner should provide best practices, and caution you against adding technical debt to your platform.

As a leading ServiceNow partner, we have seen that the primary success factor for CSM implementations is a thoughtful, people-centric approach. It is important to understand the nuances that are unique to your organization; understand your key benefit drivers and objectives; be receptive to the specialized knowledge your SMEs carry, and balance all that with technical platform skills and experience.

For more information about our ServiceNow capabilities in general, and CSM capabilities in particular, please contact us at info@integrhythm.com