KOENIG SOLUTIONS · COURSE OUTLINE

# Customer Service Management (CSM) Implementation Workshop

| 3 Days | 4 | 25 |
| --- | --- | --- |
| DURATION | MODULES | TOPICS |

## COURSE OVERVIEW

In this three-day advanced level hands-on implementation course, attendees will configure a base instance for Customer Service Management based upon a fictitious company scenario and user stories. This course is organized into sprints and retrospectives. Participants are divided into smaller groups where they will research how to complete these stories, be assigned specific user stories to complete, and configure the system while collaborating with their teammates. After each sprint, learners return to the full class for a sprint retrospective exercise. During the retrospective, each group presents their completed stories, explains how they completed the configuration, and answers questions about the choices they made. Throughout the class, learners will utilize their existing knowledge of Customer Service Management and other important training to apply what they have learned. The Customer Service Management Implementation Workshop will prepare participants to run a successful customer implementation of the Customer Service Management application. Participants will review stories, research solutions, complete configurations, and present their configurations in class as part of retrospective reviews.

## WHO THIS COURSE IS FOR

- Individuals implementing ServiceNow Customer Service Management.
- Customer Service Management Administrators/ ServiceNow System Administrators - who will be administering the applications related to the ServiceNow Customer Service Management (CSM) product.
- Technical /Solutions Consultants and Architects - who will be configuring, developing or supporting Customer Service Management (CSM) product.
- Project/Program/Engagement Managers - who will be learning implementations of Customer Service Management in ServiceNow.
- Process Managers or Administrators - who have oversight of work which will be facilitated using Customer Service Management in ServiceNow.

PREREQUISITES

- Learners must have a working knowledge of the Now Platform, including navigation, form configurations, tables, plugins, security, service catalog, service level agreements, dashboards, users, groups, and roles.
- Required: ServiceNow Administration Fundamentals
- Required: Certified System Administrator Exam
- Required: Customer Service Management Essentials
- Recommended: Case Types, Service Definition, Service Catalog Fundamentals
- Recommended: Customer Service Management Best Practices for Implementation
- Recommended: Contact Center as a Service (CCaaS) Integration Fundamentals
- Recommended: Customer Relationship Management: Customer Data Fundamentals
- Recommended: Customer Portal and Configurable Portal Widget Fundamentals
- Recommended: Customer Relationship Management: Customer Product Fundamentals
- Recommended: Knowledge Management for Customer Service Management Fundamentals

LEARNING OBJECTIVES

## What You Will Learn

- Identify key resources for CSM Implementation
- Enable required CSM plugins
- Create groups, Internal Business locations, and Product Models
- Extend Case table
- Clone and configure the /csp and /blsp portals
- Create knowledge base for authenticated and unauthenticated users
- Configure workspace
- Create service channels, presence states, work item queues, Advanced Work Assignment Eligibility and reject reasons
- Configure and route unauthenticated chat
- Enable lookup and verify
- Create Service Level Agreements and Dashboards for reporting
- Configure playbooks

COURSE SYLLABUS

# 4 Modules, 25 Topics

MODULE 1

01

## Implementation considerations

TOPICS

### Objectives

- Business Models to Customer Data Models
- Industry Data Models
- Security
- Governance
- Organizational Change Management

MODULE 2

02

## Customer Scenario

TOPICS

### Objectives

- Customer Scenario
- Customer Service Management Processes
- Statement of Work
- Plans and Packages
- Capability Matrix

### Activity

- Review the customer's Statement of Work and confirm what package was purchased.

MODULE 3

03

## Customer Service Management Implementation

TOPICS

### Objectives

- Review the resources needed for the instance
- Review the sprint plan for the implementation and assign tasks to team members
- Complete sprints
- Conduct retrospective meetings

### Activity

- Enable required plugins
- Create groups, product models, record producers, cases, knowledge base articles
- Extend and update tables
- Stock management
- Clone, associate record producers, and configure portals
- Configure Advanced work Assignment
- Configure unauthenticated chat and routing
- Configure lookup and verify, end to end turnaround measurement, and playbooks
- Configure dashboards

MODULE 4

04

## Wrap-up

TOPICS

### Objectives

- Identify Enhancements and Defects

COURSE CONTENT SUMMARY

## What the Course Covers

- Customer Service Management Foundational Data
- Consumer Service Portal
- Business Location Service Portal
- Portal Record Producers
- Knowledge Management
- Customer Service Management Configurable Workspace
- Advanced Work Assignment
- Virtual Agent
- Service Level Management
- Reporting
- Playbooks

DELIVERY NOTE

## How It Is Delivered

- The Customer Service Management Implementation Workshop is an advanced 3-day course taught as Instructor-led training (ILT) and Virtual Instructor-led training (VILT).
- The trainer's role in this course is to encourage learners to think critically, provide guidance, and to encourage learners to make informed decisions on how to implement Customer Service Management based upon recognized best practices. If necessary during the retrospectives trainers may demo some of the stories to provide clarity on the correct configurations or to reinforce learning.
- Step-by-step instructions are not provided in this course. Learners will be conducting research on how to implement Customer Service Management by utilizing Now Create, Product Documentation, and other ServiceNow resources. Participants will also receive a ServiceNow student instance to be used in class and a Participant Guide eBook.
- During this three-day interactive training course, participants will access the ServiceNow platform in their own student instance. This instance will have minimal configurations and test data.
- Class schedule: Three Days, 09:00am - 5:00pm, includes a daily 1-hour lunch break and two 15-minute breaks.

WHAT IS INCLUDED

## Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

## Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

FLEXIBLE DELIVERY

## Learn the Way That Suits You

- Classroom Training
- Live Online Classes (ILO)
- Fly-Me-A-Trainer (FMAT)
- Flexi (Self-Paced)
- 1-on-1 Training

### Ready to Get Started?

Talk to a learning advisor about schedules, group training and customised delivery.

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