



WHITE PAPER

How ServiceNow Enables Seamless Implementation of Customer Service Management in Your Organization

Executive Summary

We live in a data-driven world where offering a personalized experience to customers is more important than ever. A Customer Relationship Management (CRM) tool might be beneficial, but leveraging it the right way is critical. These tools help in recording and tracking interactions of customers across platforms. However, the real deal is that their customer interests go far beyond that.



Businesses today need better connectivity and engagement tools that facilitate real-time understanding of customer behavior. The static and dynamic data can combine to present a much better picture of this pattern. To solve this problem, ServiceNow has introduced its Customer Service Management (CSM) platform.

Studies have shown that customer strategy remains the second most important priority for CEOs as part of their strategic business priorities list

The CSM platform helps in solving various issues like:



Doing away with disparate processes that make issue identification difficult



Removing manual processes that consume time and remain error-prone



Improving customer interaction channels to offer a consistent experience



Servicing requests that come from unaligned channels



Overcoming lack of comprehensive self-service options that lead to agent and customer frustration

This whitepaper looks at the benefits of ServiceNow's Customer Service Management (CSM) platform and how you can seamlessly implement it in your organization.



Why Businesses Need ServiceNow's Customer Service Management Tool

Good customer service is about providing the best support before, during, and after the sale of a product or service. You would not only want to meet but also exceed the expectations of your customers. It is possible to achieve that by providing reliable customer support through a series of services.

Your customers can use the product or service much more efficiently and get the best returns. The Customer Service Management platform of ServiceNow allows the application of service management principles to the process. It leads to improved customer satisfaction and reduced case volume. Your customers will be much satisfied, and agents will be much relieved from mundane workload.

A **McKinsey report** has shown that investments in customer-success initiatives were responsible for the success of cloud computing companies that had top-quartile revenues.

Here are some of the specific benefits of using the CSM platform.



Improves revenue

An efficient customer service management leads to seamless working processes for your customers. Happy customers can improve your brand value by several notches. They further become brand advocates who bring more business for you without having to spend a penny. If you want to retain customers, the best way is to improve their experience.



Leads to satisfied employees

Companies that have motivated and engaged employees always have a good chance of achieving their goals quickly. You can streamline your internal processes and align disparate teams. It will help you increase the process efficiency and decrease workload. There can't be a more favorable situation for a business. Better coordinated and happy employees will ensure your customers get the best service.



Improves visibility

Customer service management allows you to get visibility into your products and services. It will help you in detecting issues proactively and preventing them entirely. When you automate common problems, you can also identify and predict trends. It will lead to an improved saving of time. Whether you are from a large corporation or run a small business, the benefits of CSM are immense.

What Does ServiceNow's Customer Service Management Platform Look Like?

The Customer Service Management (CSM) platform of ServiceNow offers several tools and workflows. These help businesses in viewing and tracking the interactions of their customers. Irrespective of the engagement channel or interaction, the platform gives holistic management of customer experience.

The platform automates routine tasks that make it seamless for organizations to improve customer experiences. It also helps in connecting different workflows, departments, and systems that together can resolve customer issues. Furthermore, it helps pinpoint and proactively address problems even before customers raise a complaint.

The CSM platform of ServiceNow leads to improved customer retention that brings in benefits worth **\$6.6 million**.

Here are some benefits of ServiceNow CSM for both customer service management and business.

Customer Service Management Benefits



Automate front and back-office processes to intelligently assign requests to the best employee



Empower agents and answer queries through AI-powered chatbots



Monitor services to detect problems and alert customers

Business Benefits

- ✓ Proactively addresses business issues
- ✓ Goes far beyond self-service
- ✓ Connects teams for improving operational efficiencies

Supporting Capabilities



Features of ServiceNow's Customer Service Management

Offering rich and consistent customer experiences is one of the essential aspects of running a business. In this hyper-digital world, your customers are everywhere. They will be mostly online, giving you a better chance to target them through various digital mediums. This also makes it challenging for businesses to offer a consistent omnichannel experience.

Even though you might want to personalize the outreach efforts, your manual and disparate processes might not always allow that to happen. To help businesses prevent issues related to customer service delivery, ServiceNow's CSM platform comes in handy. It helps in providing uniform customer service workflows that improve service delivery experiences across channels.

ServiceNow's CSM gives rise to several new up-sell and cross-sell opportunities. In a study, it offered incremental revenue benefits of worth **\$3.5 million**.

CSM-supporting Capabilities of ServiceNow

Businesses can get seamless, end-to-end CSM support across the enterprise to solve customer requests. One of the advantages of the CSM platform is that it proactively resolves customer issues. It leads to reduced service cases and improved customer satisfaction.

The CSM platform also gives a modern touch to customer service management by intelligently detecting issues and assigning them to the concerned authority. Right from the flagging of the issue to the resolution stage, the platform tracks the progress without any human intervention.

The AI capabilities of CSM also help in studying customer behavior. Businesses can predict and identify trends to gain actionable insights for improving current processes and automating resolutions. ServiceNow's CSM function also offers a customizable service portal where customers get personalized self-service options.





Modules of ServiceNow's CSM



Self-service Portal

Eliminates the need for customer service agents to resolve client issues.



Knowledge Management

It is a repository of customer support articles that agents and customers find helpful.



Virtual Agent

Virtual agents and chatbots scan the platform to identify the best information in the shortest time.



Intelligent Routing

Assigns cases and work orders depending on the skills, availability, and locations of customer service agents



Surveys

Help in gathering and analyzing customer feedback.



Automated Workflows

Automate processes through rule-based workflows.



Virtual Task Board

Offers improved transparency about the ticketing process.



Performance Analytics

Offers insights and knowledge of trends to refine service deliveries.



Reports and Dashboards

Allows analysis and tracking of customer service activities through interactive dashboards.

Features of ServiceNow's CSM

Here is a list of some key features that make up the customer service management platform of ServiceNow.



Case Management

CSM enables hassle-free communication between agents and customers through the case management feature. Agents can also add details regarding each case to the Knowledge base. It acts as a reference to resolve similar cases in the future.



New Application

CSM becomes a New Application once you install it in the ServiceNow environment of your organization. It will offer new and enhanced functionalities to support customer management.



Special Handling Notes

Agents can use this feature to create notes and get more information about individual records.



Matching Rules

You can create matching rules through scripting. It becomes possible to assign cases to the agents directly based on their details.



Portals

There are two types of portals available on ServiceNow CSM. You can choose them based on your business needs.



Customer service portal

It is an in-service portal where users can add, view, and manage cases. Customers can find information from repositories through the search console. They can also use community pages, knowledge base, customer support cases, and help pages.



Consumer service portal

It is a web interface that provides information for the internal use of the company. It is much like the service portal application of ServiceNow. Consumers can find information and get their queries resolved through support agents.



Connect Support

Allows chatting with end-users or customers and the creation of cases from a chat.



CTI Softphone

Allows making and receiving of phone calls without the need to leave the customer service application.



Assignment Workbench

Customer service managers can assign tasks to agents based on predefined criteria. It can include skills and availability to segregate agents in a group. Managers alone have access to this information and can use it for task management.



Performance Analytics

Performance analytics dashboards generate analytics that matter. Users can open context-sensitive dashboards in forms related to customer service.

Advantages

Advantages of ServiceNow's Customer Service Management

Here are some advantages offered by the customer service management platform of ServiceNow.



Drives customer loyalty

It is a comprehensive platform that offers much more than a traditional solution that can address issues. The platform allows you to bring together front, middle, and back offices. It will help in addressing issues proactively and handling regular requests. It will lead to a reduction in caseload and improvement in customer satisfaction.



Brings front, middle, and back offices together

CSM helps in fixing and preventing issues by bringing together customer service and other departments. You can also automate processes to improve the resolution time. The members of your customer service team can detect and assign issues to the concerned departments. They can also track those issues till they get resolved. When the problem gets solved for a customer, it won't affect other customers in the future.



Addresses customer issues proactively

The platform gives you real-time visibility to identify issues and prevent them. If there are any issues, you can send proactive alerts to customers. It will help them remain aware of the problem and eliminate the need for them to contact you. You can experience marked improvements. Furthermore, you can also automate resolutions for some of the commonly recurring problems.



Manages common customer requests promptly

Users can get two options for self-service. You can get an online service experience that remains completely customizable. The Engagement Messenger also gives you the option of adding self-service to third-party applications. It will help you empower your customers to initiate common requests.

Your customers can also get their requests resolved by getting solutions through chatbots in conversational formats. They can also identify solutions by engaging with peers. The knowledge base further allows them to get answers to common issues.

A study showed that the CSM function of ServiceNow resulted in benefits worth **\$1.3 million.**

It also led to improved organizational efficiencies, increased productivity, and better decision making.

Four-step implementation of Customer Service Management With ServiceNow

Any customer-centric business today would have two main objectives to achieve. These are improving customer satisfaction and spending a lesser amount towards that. The Customer Service Management solution of ServiceNow enables this through a set of following features.

- ✓ Complete workflow management and smart routing for intaking and resolving cases.
- ✓ Self-service options through Knowledge Management for common requests.
- ✓ Omni-channel support so that customers can choose their preferred communication channel to engage with the business.
- ✓ Empowered service agents who flag issues and configure rules-based instructions.
- ✓ Holistic case resolution through integrating third-party applications with ServiceNow.

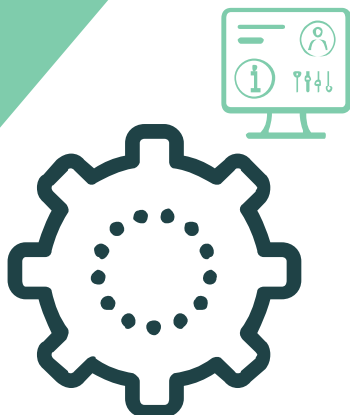
Here's how you can implement customer service management with ServiceNow in four steps.

Step 1: Setting the Foundation for CSM Agents

You will have to perform some basic setup activities when you get started. It will be irrespective of whether you want to migrate from a legacy application or build your CSM capabilities from scratch. Various steps in this process begin from activating the instances of ServiceNow.

You will then have to set up users, groups, roles, and customer information. The next step is to configure a Service Catalog. It will include services that your customers will most likely request. You might find it overwhelming to get started, but it's not that difficult. The ServiceNow platform offers excellent robustness. It will help you in getting done with the basics without any fuss.

You can also add some administrative functionalities at this step. It is possible to route and assign cases with the help of rules. Your agents can also track and analyze trends and metrics related to customer requests. The smart routing capabilities of the ServiceNow platform enable you to assign a case depending on the skills, workload, and availability of agents. You can also create a knowledge base and add content that your agents will find helpful.





Step 2: Enabling Customer Self-service

You will have to enable an omnichannel engagement strategy once you are through with setting up back-end CSM operations. At this stage, you can also create a self-service portal. It is also possible to execute both steps one and two simultaneously. However, this is possible only if you migrate from a legacy application.

You will also need intelligence regarding the patterns of Customer Service and automating routine requests. A social collaboration approach and knowledge base helps in automating common requests and adding self-service options. You can then move towards adding customer feedback surveys after setting up the previous step.

When agents close a request, customers will get notified to finish surveys. It is one of the best tools to gather information about the effectiveness of your customer service management function. There is also support for mobile devices.

Step 3: Integrating Systems and Enabling Real-time Collaborations

You need to consider two aspects at this stage. The first one involves providing agents with visibility into issues. It is primarily to avoid a situation where agents have to log in to multiple applications to search for information. The next consideration is about sending knowledge and notifications related to events to customers and agents.



If there are integrations with Event Management, you can notify agents to remain watchful of outages related to service. You can also send these alerts as announcements to the self-service portals of customers. It will significantly reduce the service requests related to outages. Agents can automate request creation by integrating the platform with Change and Problem Management. It will also help your business to check and track the root cause of the issues.

When agents close a request, customers will get notified to finish surveys. It is one of the best tools to gather information about the effectiveness of your customer service management function. There is also support for mobile devices.

Step 4: Improving Customer Interaction

Some reports offer insights, while others give data. Both of them are critical and valuable in their own ways. An efficient customer service management function requires data-driven reports. It helps capture and analyze metrics like contact resolution percentages, SLA adherence, resolution time, and much more. These help in managing operations seamlessly.

Another type of reporting involves the use of dashboards, which help in driving insights and visualizing trends. These become useful when in use across the system for a period of time. You can check the dashboards and refine them based on the system learnings.

The metrics related to dashboards can help improve customer satisfaction and reduce costs towards achieving that. You can analyze dashboards and their trends to improve and refine processes. It will only help you in making the customer self-service options better.



Conclusion

Businesses today need to leverage customer service management tools to improve their service quality. Improved service management helps in offering consistent, reliable, and scalable solutions to improve customer interaction. The Customer Service Management of ServiceNow helps in connecting customer support teams with other departments of the organization.

The platform enables communication between customers and support teams through multiple channels. Agents from support teams can answer questions, resolve issues, and fulfill requests. Businesses who invest in ServiceNow reap the immense benefits on offer in the customer service space.

When you implement ServiceNow as a service management tool, you bring a service strategy that brings the desired results. A ServiceNow implementation partner can help you create the desired customer experience at the right cost. You can expect a collaborative and agile approach that gathers disparate systems and processes on a unified platform. You can expect a satisfied customer lifecycle where managing their experience is seamless.



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