

# Customer Service Management Essentials (CSME)

ID CSME Price 2,256.— €(excl. tax) Duration 3 days

## Important notes for the booking of ServiceNow trainings

1. So that we can finally process your registration, you will receive an enrollment request after booking the course. Please carry out the enrollment immediately, at the latest **three** working days before the start of the course, according to the following instructions at ServiceNow:  
[Enrol for Instructor Led Training using Learning Credits](#)
2. Please note that we must receive short-term bookings no later than five working days before the course begins.
3. If you are unable to attend the training date you have booked (e.g. illness, etc.) or if ServiceNow cancels the course, a credit note is not possible under any circumstances. If you cancel, you can name a replacement person. In both cases of cancellation, the validity of your credit remains for 12 months after the order.

For more information, please refer to the [ServiceNow Terms and Conditions](#).

## Who should attend

The ServiceNow Customer Service Management Essentials course is for Customers, Partners, and Employees who administer features, functions, and data associated with Customer Service Management. An attendee is a good fit for this course if they perform or advise on any of the following roles or job responsibilities:

- Customer Service Management Administrator / ServiceNow System Administrator - who will be administering the applications related to the ServiceNow® Customer Service Management (CSM) product
- Technical / Solution Consultants and Architects – who will be configuring, developing, or supporting the applications related to the ServiceNow® Customer Service Management (CSM) product.
- Project / Program / Engagement Managers – who will be

leading the implementation of the ServiceNow® Customer Service Management (CSM) product.

## Prerequisites

Completion of the following courses is required for a successful class experience:

- Welcome to ServiceNow On Demand
- [ServiceNow Administration Fundamentals \(SNAF\)](#)
- [ServiceNow Platform Implementation \(SNPI\)](#)

## Course Objectives

Students learn how to perform the following activities through a mix of lectures, group discussions, and hands-on exercises:

- Describe the Customer Service Management product in terms of features, benefits, and architecture.
- Define essential customer service concepts and processes, including the difference between Interaction Management and Case Management and their end-to-end lifecycles.
- Manage and administer customer data such as Consumers, Accounts, Contacts, Contracts, Entitlements, Sold Products, Install Base items, etc.
- Address customer inquiries and resolve issues using Cases, Case Types, Case Tasks, State Flows, Escalations, Major Issue Management, etc.
- Configure the baseline Case configuration using Case Types and Service Definitions.
- Configure and use CSM Configurable Workspace to manage and work Cases originating from a variety of communication channels.
- Enhance agent productivity using Advanced Work Assignment for Interactions and Cases.
- Manage cases intelligently using Special Handling Notes and Targeted Communications.
- Track the health of the business processes using analytics for Customer Service Management.

## Detailed Course Outline

## Module 1: Introduction

### Objectives

- Define essential concepts such as Customer Service Management, Customer, Service Provider, and Service Request Channels
- Differentiate between a Case and an Interaction
- Describe the CSM application architecture in terms of applications and features
- Hands-on practice

## Module 2: Customers

### Objectives

- Define common business models such as B2B, B2C, and B2B2C
- Extend a customer data model
- Create and manage core customer data
- Relate customer data to interactions, cases, and case tasks
- Hands-on practice

## Module 3: Interactions

### Objectives

- Get skilled in Interaction Management in the CSM Configurable Workspace
- Discuss Communication channels and differentiate between Agent Chat and Virtual Agent
- Configure interaction routing using Advanced Work Assignment
- Discuss Agent Affinity
- Hands-on practice

## Module 4: Products and services

### Objectives

- Define Products and Product Models
- Discuss Install Base management and its components - Sold Products and Install Base Items
- View the Install Base Data Model Hierarchy
- Discuss Install Base Industry Use Cases and implementation Best practices
- Introduce Contracts, Entitlements, and Entitlement Workflows
- Hands-on practice

## Module 5: Case

### Objectives

- Review the concept of Case and case initiation
- Describe the Case Lifecycle flow
- Recognize the importance of SLAs for improved Case management
- Use Special Handling Notes to highlight important case details
- Work cases in the CSM Workspace and explore CSM customizations
- Identify the benefits of Case Types
- Configure custom Case Types
- Hands-on practice

## Module 6: Case initiation

### Objectives

- Discuss Case Routing and assignment and review available configuration options
- Explore how Agent Affinity enhances Advanced Work Assignment
- Introduce Service Definitions in the context of Case Types
- Configure the Case Type Selector
- Review the Email-to-Case and Service Catalog-to-Case process flows
- Hands-on practice

## Module 7: Case in progress

### Objectives

- Define Case Tasks and use them to manage cases more efficiently
- Get familiar with Case Task Service Definitions and how they relate to Case Types
- Configure Blocking Tasks
- Escalate and manage an escalated Case
- Configure Case Summaries
- Hands-on practice

## Module 8: Case resolution and closure

### Objectives

- Explore the Case Resolution process flow
- Capture Case Details using Post Case Review notes
- Configure automatic case closure
- Generate CSM process feedback through automated surveys
- Hands-on practice

## Module 9: Major Case Management and Targeted

## **Communications**

### **Objectives**

- Determine when to promote a Case into a Major Case
- Get familiar with the structure of a Major Case
- Manage Affected Customers using the Recipient List
- Explore the Major Case Management process flow
- Configure Targeted Communications
- Hands-on practice

## **Module 10: Metric Strategy**

### **Objectives**

- Discuss the importance of having a Metric Strategy
- Review and discuss best-practice CSM metrics
- Navigate persona-based dashboards
- Review the CSM dashboard configuration process
- Get a quick look into analysis and metric building tools
- Hands-on practice

# About Fast Lane



Fast Lane is a global, award-winning specialist in technology and business training as well as consulting services for digital transformation. As the only global partner of the three cloud hyperscalers- Microsoft, AWS and Google- and partner of 30 other leading IT vendors, Fast Lane offers qualification solutions and professional services that can be scaled as needed. More than 4,000 experienced Fast Lane professionals train and advise customers in organizations of all sizes in 90 countries worldwide in the areas of cloud, artificial intelligence, cyber security, software development, wireless and mobility, modern workplace, as well as management and leadership skills, IT and project management.

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