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Using IT Service Management with Customer Service Management (CSM)

Prescriptive guidance for a successful partnership

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Introduction

This whitepaper seeks to provide prescriptive guidance on how to use the ServiceNow IT Service Management and Customer Service Management products in combination to provide the best solution for supporting external customers and stakeholders.

It will detail a comprehensive explanation for the purpose of each product, who should use it and when. It will also clarify how a single piece of work moves seamlessly across the suite of products.

Definitions

For the purposes of this document key terms are defined as follows:

Term	Definition
Product	Any tangible or intangible good or service that can be sold to the customer to generate revenue for the business.
Customer	An individual or a business that receives, consumes or buys a product or service from your company. Customers are an external stakeholder of the business.
Customer Service	Function to provide support to your customers for the products and services that they have purchased. This can be in either a business to business, business to consumer or business to business to consumer model. This can be in the form of a Customer Contact Center or less formalized setup but will be dedicated to the support of external customers.
Technical Customer Support*	Function that provides technical support for all products sold to customers. This type of support is mostly offered by technology companies and is typically delivered by different departments within an organization such as TAC (Technical Assistance Center), NOC (Network Operations Center) etc.
IT Support*	Function to provide technical support for all internal products/services available to employees.
***Technical Support**	In some organizations the Technical Customer Support function and the IT Support function are a single unit covering both support services and would not be identified as organizationally separate. Collectively these are known as Technical Support.
Employee	Individual that receives technical services and support from the IT Support function. This may be a permanent, temporary or contracted employee.
Internal Service	Services or products that are provided to the employee as part of performing their job function.

What is IT Service Management?

IT Service Management (ITSM) is the name for a collection of products that are used for the support and management of internal technical services offered to the employees of an organization.

The primary owners and consumers of the ITSM products is the IT Support function and the Technical Customer Support function.

The primary products are:

- Incident Management
- Change Management
- Problem Management
- Service Catalog and Request Management
- Knowledge Management
- Configuration Management Database

The **Incident Management** product should always be used when there is an impact to a technical service and measures must be taken by the IT Support function or the Technical Customer Support function to restore that service as soon as possible using whatever method is available. The Incident Management process sits between IT Support/Technical Customer Support and their customers or employees in that incidents are raised or reported by users outside of these functions and the issues are resolved by those inside these functions or their 3rd party providers.

The **Problem Management** product should always be used when one or more incidents have occurred and an underlying cause or permanent method to fix the service impact has not yet been discovered by the technical support functions. It should also be used to proactively address technology issues before a service impact has been experienced. The Problem Management process is a Technical Support process. Only the Technical Support functions understand the criteria for a problem and are capable of providing the information required to process one. Incidents reported by customers or employees may result in a problem however the problem itself should never be raised by them.

The **Change Management** product should always be used when an alteration must be made to a technical service. This alteration will always be applied by the Technical Support functions or a 3rd party provider and therefore the Change Management process is an internal Technical Support process. Only the Technical Support functions or 3rd party providers will understand what a change is, what steps must take place to implement that change, how to mitigate the risk to services and when the best time to implement is. Requests or incidents raised by customers or employees may result in a change however the change itself should never be raised by them.

The **Service Catalog and Request Management** product should be used when a customer requires a product from the Customer Support group or when an employee requires an internal service. The Request Management process is used in ITSM to sit between the Technical Support function and its customers or employees in that requests are raised by users outside of Technical Support and they are fulfilled by those inside Technical Support or its 3rd party providers. Service Catalog and Request Management is not a product that is uniquely used by the Technical Support functions and therefore it is shared across many organizational areas and may contain other services and products such as HR, Finance, Facilities, Legal or external customer items.

The **Knowledge Management** product can be used to capture valuable information about Technical Services. It is also used in conjunction with Problem Management to publicize known errors to the organization to spread awareness and reduce incidents. Knowledge Management is not a product that is uniquely used by the Technical Support functions and therefore it is shared across many organizational areas and may contain information such as HR, Finance, Facilities, Legal or externally published information.

The **Configuration Management Database** (CMDB) is a product intended to support the Case, Incident, Problem and Change Management processes by allowing them a deep insight into the supporting technological infrastructure for each service. Establishing how it fits together, where there are dependencies and so on in order to speed up the quest for service restoration or better understand the potential for service impact. The CMDB is a Technical Support resource.

What is Customer Service Management?

ServiceNow Customer Service Management (CSM) goes beyond traditional customer service solutions to serve your customers faster and more effectively. CSM transforms customer support by applying Service Management principles. CSM covers the range of products to be used by the Customer Service or Technical Customer Support function of an organization and is designed to support external customers or to provide non-IT related unified support to internal and external users.

Many customer support organizations are well versed with the Case Management process but typically are not aware of the Service Management processes and the benefits these processes bring to the table.

The individual products are:

- Case Management
- Account Management
- Contract and Entitlement Management
- Product and Asset Management
- Knowledge Management
- Communities
- All products included listed above under IT Service Management

Customers contact your organization through different channels to seek assistance with the product that they have purchased. The **Case Management** product should be used to track and manage customer interactions. A case is created in the application to identify the customer's question or an issue and to track activities related to resolving the issue. Cases are managed by a Customer Service Agent and will always remain the responsibility of the Customer Service organization. Some cases can be dealt with entirely within this organization however others will require additional teams or functions outside of Customer Service to assist. This is where Case Management interacts with other processes. Case Management is the process that functions both internally and externally providing the join between external customers and internal processes.

Account Management offers a 360° view of the customers key contacts, contact preferences, locations, products, and account relationships. An account is a supported customer, and the

account form stores the customer's information, including the company name, contact names, addresses, phone numbers, and web and email addresses. An account can be a business or an individual consumer.

The **Contract and Entitlement Management** feature defines the type of support that a customer receives. A service contract record stores information about the type of support that is provided to a customer. A contract can include a customer and contact and the specific assets that are covered. An entitlement defines the type of support that a customer receives as well as the supported communication channels. An entitlement check is performed when a case is opened. This check takes into consideration the existing cases for the specific account, product, asset, and service contract.

Product and Asset Management identifies the product models and individual product instances owned by a customer. Products are used to capture the goods or services that a company sells to their customers. Assets are used to capture the specific product instance that is purchased by the customer. Assets can have serial numbers or asset tag numbers and can be allocated to individual accounts or to a contact within an account. Assets can also have associated support contracts.

The **Knowledge Management** product can be used to capture valuable information about the organizations externally provided services to enable Customer Service Agents to find answers or information that will assist them in dealing with customers. Knowledge Management for CSM is the same product as Knowledge Management for ITSM.

The **Communities** product provides a personalized, self-service experience for every customer. Customers get the information most relevant to them by engaging with peers and experts and from contextual search. Communities includes core capabilities such as managed forums, curated topics, support for multiple content types, moderation and granular permissions.

Licence Model

The CSM licence has been designed to recognize that customer service functions will require ITSM processes in order to function successfully. Therefore, all core ITSM processes are included when purchasing CSM and customers are strongly encouraged to make use of all available capabilities.

Product / Feature	ITSM	CSM
Incident Management	✓	✓
Change Management	✓	✓
Problem Management	✓	✓
Service Catalog and Request Management	✓	✓
CMDB	✓	✓
Knowledge Management	✓	✓
Case Management		✓
Service Org and Account / Household Management		✓
Contract and Entitlement Management		✓
Product and Asset Management	✓	✓
Communities		✓

Customers who purchase the CSM licence are entitled to all the ITSM products. Agents who support external users or provide unified support to internal and external users only need to be licensed for CSM. Agents who only help internal users with IT Service issues need an ITSM license.

ACME CORP
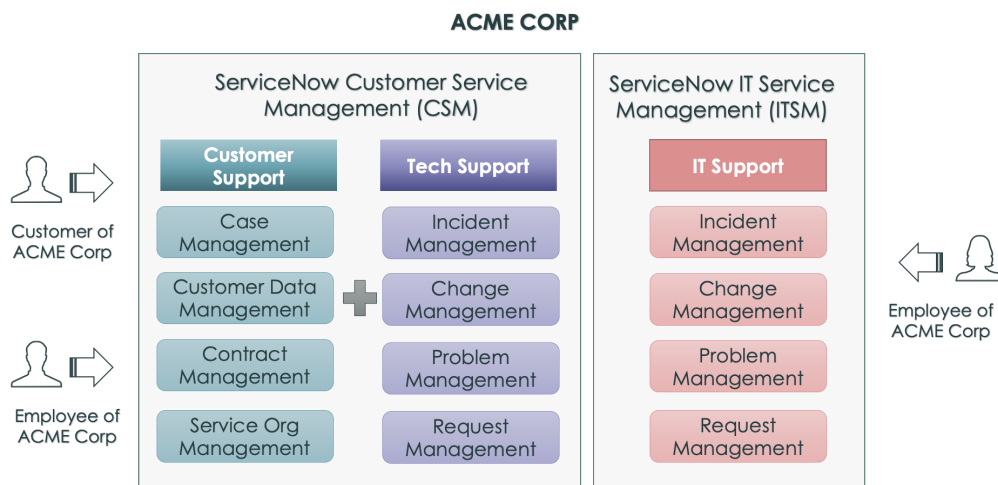
Combining ITSM and CSM

ITSM and CSM products both serve specific purposes however the two products are intended to serve organizational functions that are very closely related and therefore naturally enhance and support each other.

Starting with ITSM

ITSM is recommended to be used for internal IT service desks to to deliver IT services to employees.

When to adopt CSM?

Companies who have been using ITSM to deliver technical support can now adopt CSM to deliver both customer support as well as technical support to their customers.

CSM is required when the technical support functions have evolved to a position where internal IT support has been organizationally separated from external technical customer support and there are now dedicated teams even though both are technical support functions. In addition to this technical support separation the organization has now created a customer service function to manage the relationship with all external customers rather than allowing direct access to the IT service desk. The new technical customer support function is part of this wider customer service operation whereas IT support is not.

The Case Management product now sits between the customer and the ITSM processes meaning that external customers will no longer raise their own incidents and requests but will instead interact with a single record type, case, that provides all the information they require. The new Customer Service Agent role will own responsibility for the case and the relationship with the customer and will co-ordinate the required activities which will continue to include using the ITSM processes as part of dealing with the case.

ITSM can very well handle the processes to solve technical needs but it does not provide the ability to manage customer accounts and offer tailored support packages.

Starting with CSM

Companies can adopt CSM to transform their customer support using case management and other related processes to track customers, their issues, products and entitlements. Customers can decide to adopt ITSM processes later to transform their technical support by implementing Incident, Problem, Change and Request Management.

When to introduce ITSM processes?

Once a company has streamlined their customer support processes they can consider optimizing their technical support function by adopting ITSM processes. Since the CSM licence includes Incident Management, Change Management, Problem Management, Request Management and a CMDB all of the ITSM processes are neatly integrated with Case Management to deliver outstanding customer service.

If a customer is selling technical products and services but not using proper service management processes to support them this is the ideal opportunity to bring in ITSM processes. The introduction of dedicated processes for this purpose will provide significant improvements to the customer service process.

If a company is already using ITSM processes for their internal IT support but they are be using a separate product then they can take this opportunity to standardize all technical support into a single way of managing their services in a single platform. This can introduce many efficiencies and provide deeper insight into performance. In particular for organizations with infrastructure teams that are responsible for supporting both internal and external services this means a single process can be used for all support work regardless of whether there is an external customer involved or not.

CSM Implementation Models

Every customer service organization is different and has unique requirements. CSM allows customers to utilize Case Management and ITSM processes in different ways. ServiceNow provides two recommended implementation models. Customers can choose the model that best matches their business needs.

	Model 1	Model 2
Name	Case Management Only	Case Management with Service Management
Description	Customer Service Organization uses Case Management to resolve reported issues and to fulfill submitted requests.	Customer Service Organization uses Case Management along with Service Management to resolve reported issues and to fulfill submitted requests. Service Management processes (Incident, Problem, Change, Request) are used internally to improve operational efficiency and are abstracted from the customer.
Use When	Customer Service Organization can resolve reported issue using tools, processes and knowledge internally available to them. There is no need to track product configuration, problems and changes.	Customer Service Organization would like to use service management processes internally to streamline service delivery and operations. Customer Service Organization would like to offer simplistic and consistent customer experience. Customer communication is always handled by support agents, customer never interacts directly with internal operations teams.
Advantages	Implement simplified issue resolution process.	Harness power of service management while keeping

		simplified customer facing processes.
Disadvantages	Lack of structured process to resolve issues.	Customer communication is always funneled through support agent (case) and require a sync between Case and Incident, Problem, Change, Request.
Implementation Complexity	Low	Medium

Case Management Only (Model 1)

This option offers simplified issues resolution process. The customer service function uses Case Management to capture and resolve the customers issue or request. This option lacks structured processes (Incident, Problem, Change, Request) which can be used to resolve the reported issue.

Case Management with IT Service Management Processes (Model 2)

The customer service function uses Case Management along with Service Management processes to resolve reported issues and to fulfill submitted requests. Service Management processes are used internally to improve operational efficiency and are abstracted from the customer. This option is good for Hi-Tech companies who can transform their customer service by harnessing the power of service management while keeping simplified customer facing processes.
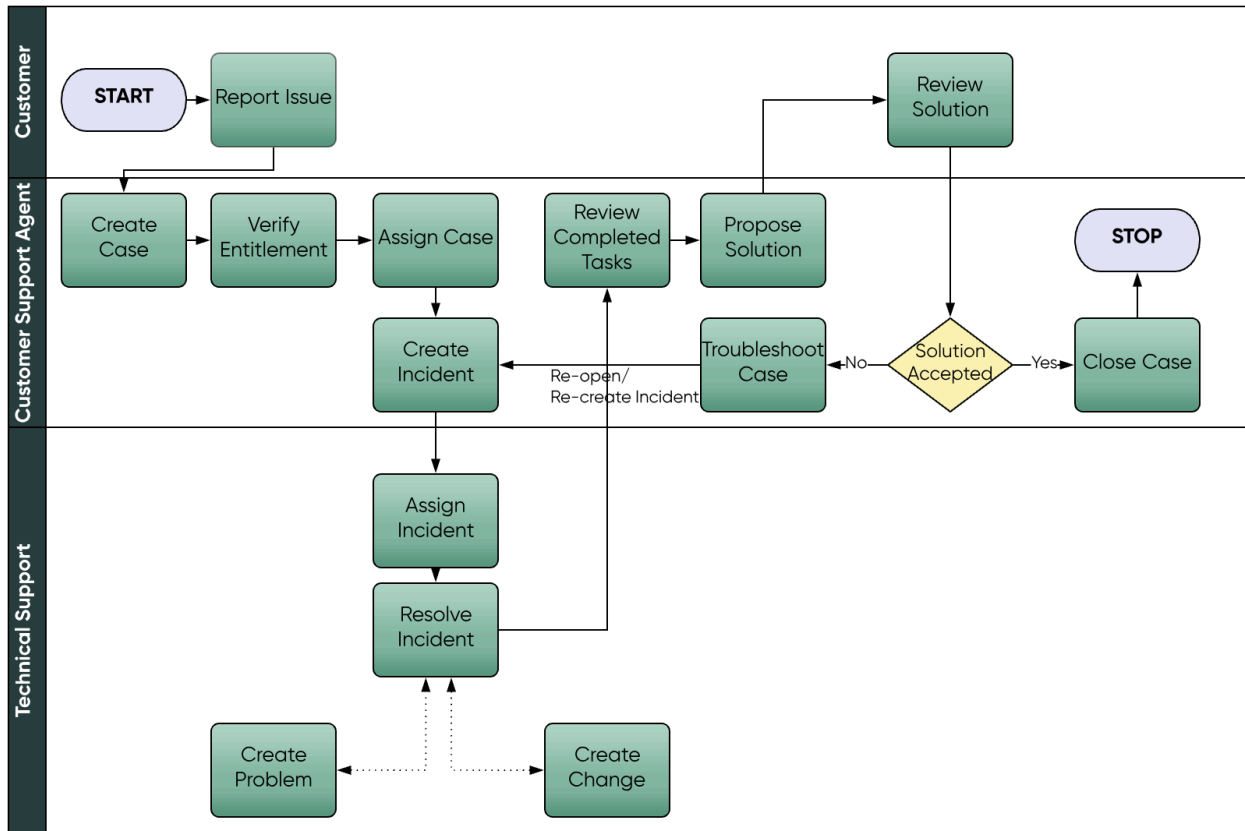
Please note that the CSM license enables companies to implement ITSM processes (Incident, Problem, Change and Request) to support customer service business processes and to deliver internal IT/employee support services.

How Case Management Interacts with ITSM

Case Management with Incident Management

Use Case Management along with Incident Management to restore service disruptions such as outages that impact one or more customers. Support agent can create an incident from case and assign it to the appropriate internal department/ team responsible for supporting the impacted service.
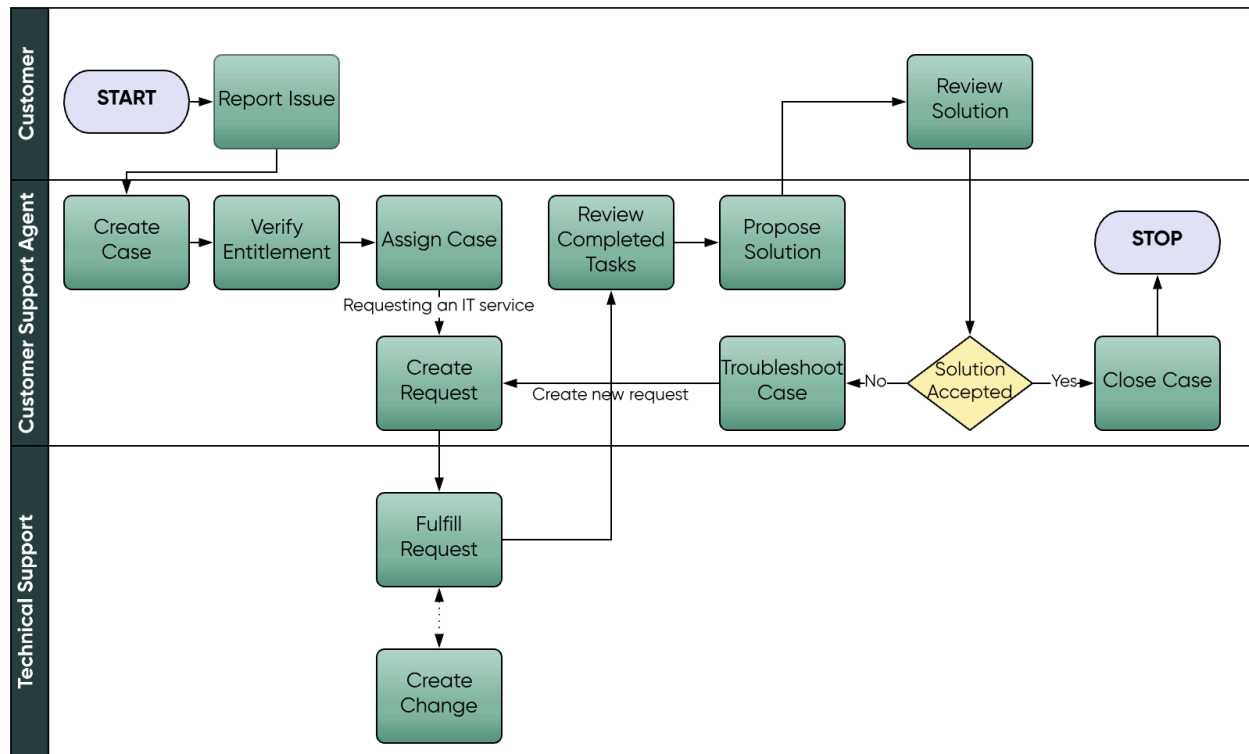
There are times when some of the internal departments/teams are customer-facing, and can directly work with the customer to resolve the reported issue. In such cases, there is no need to create a new "Incident". Instead, the same "Case" should be transferred to the internal team member, who then can own the "Case" and work with the customer towards the resolution. It is recommended to add a flag on the "Case" to indicate it a "technical" case that adhere to Incident's role in Service Management best practices.

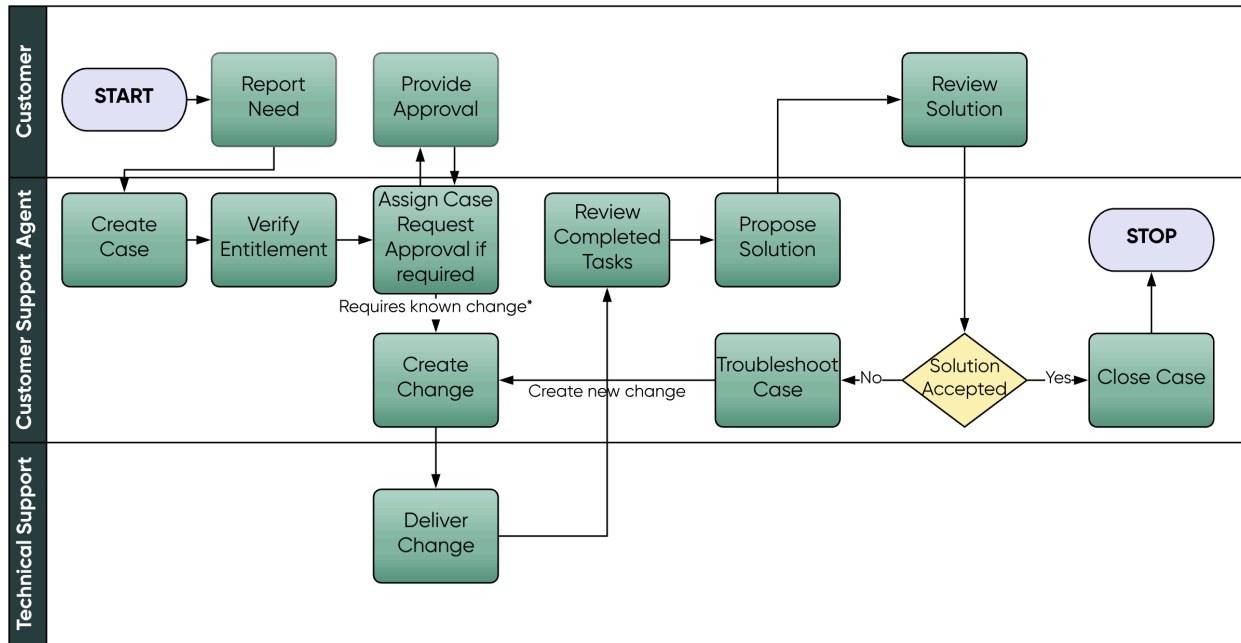| Task	Procedure	Role	Input	Output
Create Case	Create a case to capture an issue or a request submitted by customer through a valid support channel	Customer Support Agent	Customer information, impacted product, issue description	Case
Verify Entitlement and Assign Case	Validate customer and product information, determine level of support and assign case	Customer Support Agent	Case	Assigned Case
Raise to Technical Support	Identify that there is an issue with a technical product or service and raise incident	Customer Support Agent	Assigned Case	Incident
Assign Incident	Technical Support 1st line will deal with the incident if possible, otherwise they will assign to a 2nd or 3rd line support agent. If automated assignment is implemented this will not require agent involvement	Technical Support/ Automation	Incident	Assigned Incident

Task	Procedure	Role	Input	Output
Resolve Incident	Triage and investigate incident. Identify and apply resolution. A change may need to be raised to apply the resolution. A problem may need to be raised if there is a root cause to be addressed	Technical Support	Assigned Incident	Resolved Incident
Review Resolved Incident	Review the completed incident to confirm the actions taken, solutions applied.	Customer Support Agent	Resolved Incident	Proposed Solution
Propose Solution	Notify customer with the availability of the solution which can resolve the reported issue	Customer Support Agent	Proposed Solution	Solution Accepted / Rejected
Troubleshoot Case	Review reason for rejection. Re-open existing incident or raise a new one if necessary	Customer Support Agent	Solution Rejected	Solution Accepted
Close Case	Close the case upon resolution. Capture closure information	Customer Support Agent	Solution Accepted	Closed Case

Case Management with Request Management

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Task	Procedure	Role	Input	Output
Create Case	Create a case to capture an issue or a request submitted by customer through a valid support channel	Customer Support Agent	Customer information, impacted product, issue description	Case
Verify Entitlement and Assign Case	Validate customer and product information, determine level of support and assign case	Customer Support Agent	Case	Assigned Case
Raise to Technical Support	Identify that the customer is requesting something	Customer Support Agent	Assigned Case	Request
Assign requested item/catalog tasks	Requested items and the associated catalog tasks will be automatically created and assigned to the correct team	Automation	Request	Assigned Requested items/ Catalog tasks
Complete Request	Assigned technical support teams fulfil their catalog tasks to complete the request.	Technical Support	Assigned Requested items/ Catalog tasks	Completed Request
Review Completed Tasks	Review the completed request to confirm the actions taken, solutions applied.	Customer Support Agent	Completed Request	Proposed Solution
Propose Solution	Notify customer with the availability of the solution which can resolve the reported issue	Customer Support Agent	Proposed Solution	Solution Accepted / Rejected
Troubleshoot Case	Review reason for rejection. Re-open existing incident or raise a new one if necessary	Customer Support Agent	Solution Rejected	Solution Accepted
Close Case	Close the case upon resolution. Capture closure information	Customer Support Agent	Solution Accepted	Closed Case

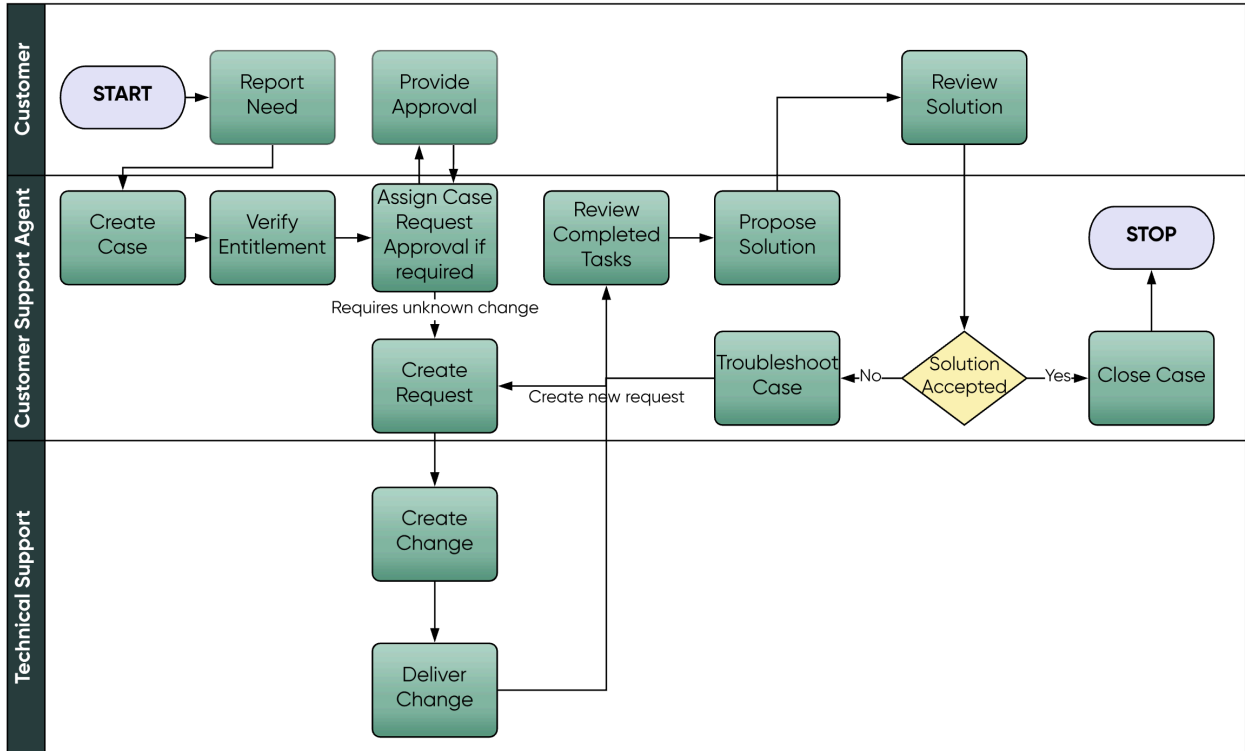## Case Management with Change Management (Direct)

*Known changes are those where the Customer Support Agent knows the implementation steps, backout plan, test plan, risk levels etc in order to complete all the required information

Task	Procedure	Role	Input	Output
Create Case	Create a case to capture a need submitted by customer through a valid support channel	Customer Support Agent	Customer information, impacted product, issue description	Case
Verify Entitlement, Assign Case, Request Customer Approval	Validate customer and product information, determine level of support and assign case. Request approval from the customer via the case	Customer Support Agent	Case	Assigned Case
Provide Approval	Provide approval for the change to proceed	Customer	Assigned Case	Approved Case

Task	Procedure	Role	Input	Output
Raise to Technical Support	Identify that the customer needs something that will require a change. Raise change request if able to populate all the required information. *Note that the CSA will need to notify the implementer and agree dates if they are not the implementer themselves since the change will go straight into the lifecycle once raised	Customer Support Agent	Aproved Case	Change
Implement Change	Change is implemented following the agreed plan at the approved time and tested for confirmation of success	Technical Support	Change	Completed Change
Review Completed Change	Review the completed change to confirm the actions taken, solutions applied	Customer Support Agent	Completed Change	Proposed Solution
Proposed Solution	Notify customer with the availability of the solution which can resolve the reported issue	Customer Support Agent	Proposed Solution	Solution Accepted / Rejected
Troubleshoot Case	Review reason for rejection. Raise a new change if necessary	Customer Support Agent	Solution Rejected	Solution Accepted
Close Case	Close the case upon resolution. Capture closure information	Customer Support Agent	Solution Accepted	Closed Case

## Case Management with Change Management (Via Request)

*Unknown changes are those where the Customer Support Agent does not know the implementation steps, backout plan, test plan, risk levels etc and therefore cannot complete all the required information

There are times when some of the internal departments/teams are customer-facing, and can directly work with the customer to resolve the reported issue. In such cases, there is no need to create a new "Incident". Instead, the same "Case" should be transferred to the internal team member, who then can own the "Case" and can create a "Change" to resolve the reported issue.

Task	Procedure	Role	Input	Output
Create Case	Create a case to capture a need submitted by customer through a valid support channel	Customer Support Agent	Customer information, impacted product, issue description	Case
Verify Entitlement, Assign Case, Request Customer Approval	Validate customer and product information, determine level of support and assign case. Request approval from the customer via the case	Customer Support Agent	Case	Assigned Case
Provide Approval	Provide approval for the change to proceed	Customer	Assigned Case	Approved Case

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Task	Procedure	Role	Input	Output
Identify Request	Identify that the customer needs something that will require a change where the CSA does not know what is required to implement it. Raise a request to technical support to have a change implemented for the customer	Customer Support Agent	Assigned Case	Request
Raise Change	Change is raised, scheduled and approved	Technical Support	Request	Change
Implement Change	Change is implemented following the agreed plan at the approved time and tested for confirmation of success	Technical Support	Change	Completed Change
Review Completed Change	Review the completed change to confirm the actions taken, solutions applied	Customer Support Agent	Completed Change	Proposed Solution
Proposed Solution	Notify customer with the availability of the solution which can resolve the reported issue	Customer Support Agent	Proposed Solution	Solution Accepted / Rejected
Troubleshoot Case	Review reason for rejection. Raise a new change if necessary	Customer Support Agent	Solution Rejected	Solution Accepted
Close Case	Close the case upon resolution. Capture closure information	Customer Support Agent	Solution Accepted	Closed Case

Case Management with Problem Management
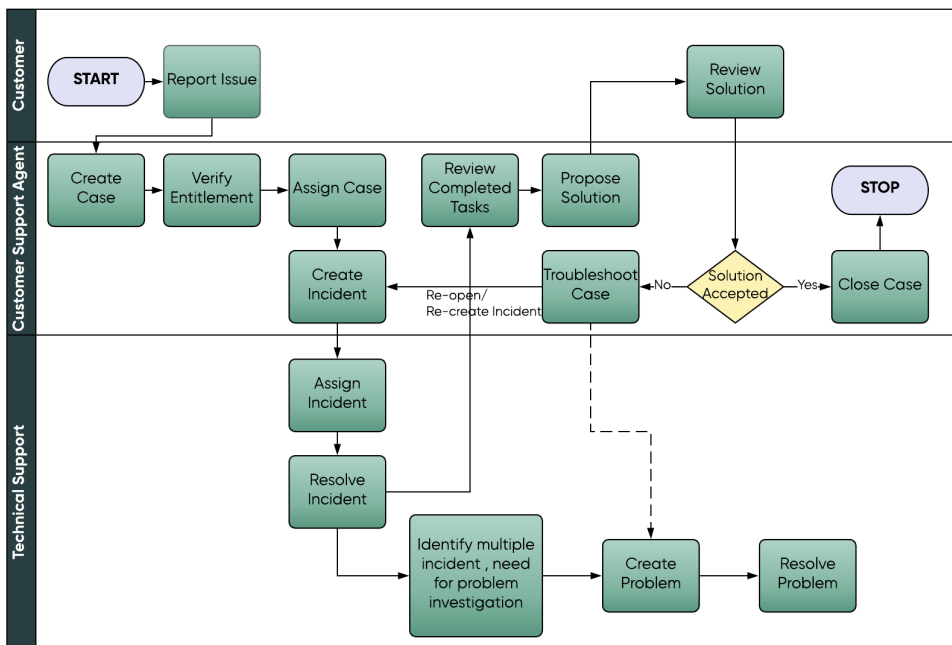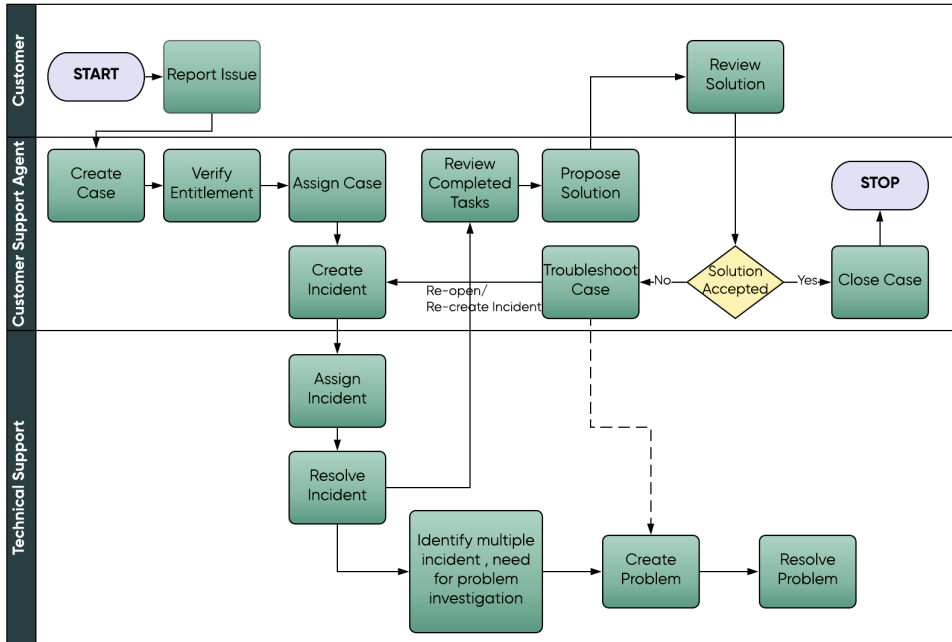
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There are times when some of the internal departments/teams are customer-facing, and can directly work with the customer to resolve the reported issue. In such cases, there is no need to create a new "Incident". Instead, the same "Case" should be transferred to the internal team member, who then can own the "Case" and can create a "Problem" to resolve the reported issue.

Task	Procedure	Role	Input	Output
Create Case	Create a case to capture an issue or a request submitted by customer through a valid support channel	Customer Support Agent	Customer information, impacted product, issue description	Case
Verify Entitlement and Assign Case	Validate customer and product information, determine level of support and assign case	Customer Support Agent	Case	Assigned Case
Raise to Technical Support	Identify that there is an issue with a technical product or service and raise incident	Customer Support Agent	Assigned Case	Incident
Assign Incident	Technical Support 1st line will deal with the incident if possible, otherwise they will assign to a 2nd or 3rd line support agent. If automated assignment is implemented this will not require agent involvement	Technical Support/ Automation	Incident	Assigned Incident
Resolve Incident	Triage and investigate incident. Identify and apply resolution. A change may need to be raised to apply the resolution. A problem may need to be raised if there is a root cause to be addressed	Technical Support	Assigned Incident	Resolved Incident
Review Resolved Incident	Review the completed incident to confirm the actions taken, solutions applied	Customer Support Agent	Resolved Incident	Proposed Solution
Identify Need for Problem	Multiple incidents show a trend towards a deeper cause that needs investigating, or an incident could only be resolved temporarily with a workaround and requires further investigation to understand the cause. Problem record raised	Technical Support	Resolved Incident	Problem
Resolve Problem	Problem investigated, root cause discovered, fix applied	Technical Support	Problem	Resolved
Propose Solution	Notify customer with the availability of the solution which can resolve the reported issue	Customer Support Agent	Proposed Solution	Solution Accepted / Rejected

Task	Procedure	Role	Input	Output
Troubleshoot Case	Review reason for rejection. Re-open existing incident or raise a new one if necessary	Customer Support Agent	Solution Rejected	Solution Accepted
Close Case	Close the case upon resolution. Capture closure information	Customer Support Agent	Solution Accepted	Closed Case

Summary

Customer Service organizations can transform themselves by adopting Service Management processes. Combining Case Management along with Incident, Problem, Change and Request Management streamlines service delivery, improves operational efficiency and increases customer satisfaction.