

# Now on Now: The journey to exceptional customer service using Customer Service Management

How ServiceNow is using the Now Platform® to build world-class customer experiences

## Table of Contents

The Customer Service Management journey .....	2
Adopting Customer Service Management.....	3
Proactive monitoring to reduce issues .....	3
Self-service for common issues.....	3
Case resolution focuses on faster time to relief .....	5
Benefits for stakeholders .....	7
Our latest technology adoptions.....	7
Future roadmap .....	8
Resources.....	8
Sidebar: Our two-phased implementation journey.....	8
Lessons learned.....	10
TSEs Speak Out .....	10
ServiceNow.....	10

## The Customer Service Management journey

### Proactive monitoring, self-service, and fast case resolution reduce time to relief

One of the largest and most mature ServiceNow instances is used by ServiceNow Customer Support. It houses all the ServiceNow products used by our customers including ITSM, ITBM, ITOM, and the Now Platform®. It is also one of our busiest, supporting 200,000 ServiceNow Community members, 85,000 customer administrators, and 25,000 cases/month.

Our Customer Support operation is critical as the lifeline for customers to manage their instances. As ServiceNow continues to grow, our volume of support cases also increased, stressing the capacity of the Support organization. We needed to rethink our entire customer support experience to create a seamless process encompassing issue identification through resolution. This meant more than engaging customers; we wanted to empower them to resolve issues quickly and easily.

The strategy had three main aspects: 1) to proactively and intelligently fix issues before customers were aware of them, 2) provide customers with AI-driven self-service options to quickly find answers to common issues, and 3) automate processes so our Technical Service Engineers (TSEs) could diagnose and resolve incidents faster. Underlying this was the adoption of ServiceNow [Customer Service Management](#), a set of capabilities that would help us scale to meet the increasing demand.

The results of our transition have gone beyond our expectations. We have experienced a 50% reduction in time to relief while our case volume has grown only 20% year over year. We've improved customer satisfaction, seen faster case resolution, and improved product and service quality. This case study discusses our transition to a seamless, end-to-end customer service experience.

## Adopting Customer Service Management

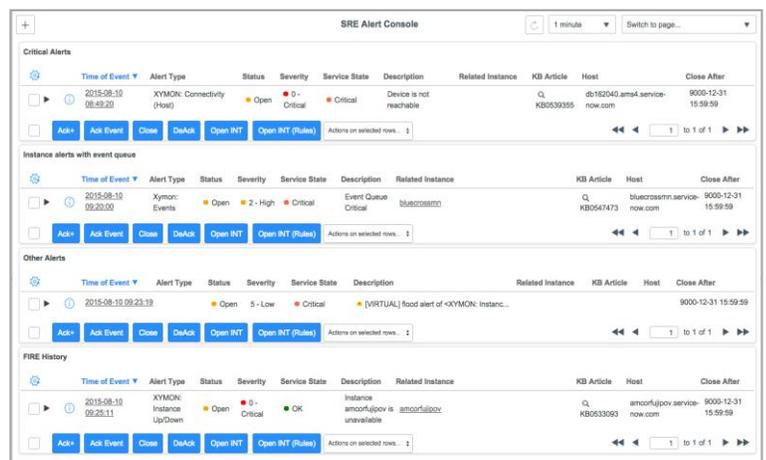
Prior to ServiceNow's first release of Customer Service Management, we had been using a highly customized version of Incident Management for external Customer Support. While Incident Management worked well for managing internal issues, we recognized moving to Customer Service Management would provide several key benefits:

- We could add customer service-oriented capabilities over time in Customer Service Management
- We could take advantage of new Case Management and agent productivity solutions
- As an internal, trusted stakeholder, we could provide feedback on software issues and suggest future enhancements to Product Development
- Upgrades to our Customer Support would be easier by using out-of-the-box functionality

The move to a new platform would have a significant impact. Approximately 500 TSEs worked incidents. During the three-year period prior to our adoption, we had logged a million historical incidents and built thousands of internal reports to monitor our internal business systems. A smooth transition would be crucial to maintaining our reputation for excellent customer experience.

## Proactive monitoring to reduce issues

One of the first areas we addressed was improving how we monitor for issues, including faster identification and remediation. Internet of Things (IoT) technology was adopted for monitoring and issue identification with ServiceNow® [IT Operations Management](#), providing a single pane of glass view for our Site Reliability Engineering (SRE) organization. Part of this effort is auto-creating cases for customers even before they are aware of the issue.



## Self-service for common issues

For the past three years, we have improved our self-service capabilities, giving customers more ways to quickly find answers to common questions and resolve low-priority issues quickly, such as zbooting and password reset. Availability of relevant content reduces the number of cases being submitted and the wait time for TSE-assisted resolutions.

Behind the scenes, we undertook a complete revamp of our search capabilities to enable federated searches across the Now Platform—including Incident, Case, Knowledge, Community, Product Documentation, and Service Catalog—all from the Support home page. We optimized search to deliver a more targeted and accurate list of answers. This reduced the average search time by two minutes and resulted in a 25% increase in the use of the Service Catalog. To date, 85,000 customers have conducted millions of searches on our portal.

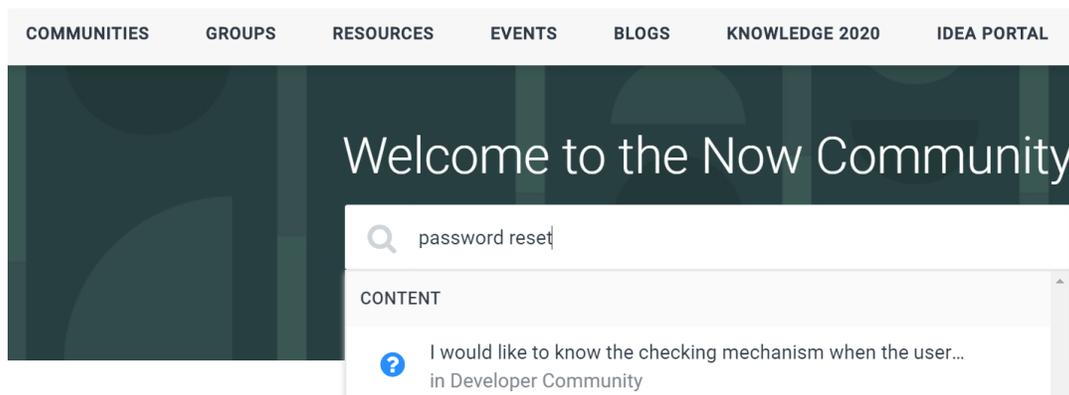


The capabilities of Customer Service Management are being used in a variety of ways:

**Service Portal/Service Catalog.** The [Service Portal](#) provides a single point of access for all customers to manage their cloud instances, including searching for relevant content in multiple repositories. Searches can be filtered by product version, products, and content type. Customers can automatically search in Community without leaving the Service Portal. The Service Catalog features automated workflows for popular requests such as resetting a password, activating plug-ins, and retiring/restoring an instance.

**Community.** [Community](#) is now the #1 most viewed content source for learning about and resolving issues, with 3 million views per month. Four out of five customers that ask questions in the Community receive a reply within six hours. It is the premier destination for customers to ask questions, get answers, and share information with peers and ServiceNow experts.

We completely redesigned and relaunched Community to be more user-friendly and easier to navigate with an on-demand library, events, SNUG schedules, and integrated Knowledge Base (KB) content. We are using smart search automation to serve relevant content after a search as well as type-ahead technology to reduce time to search. The impact is notable: while overall question volume is increasing, the volume of Support cases is decreasing as more customers find answers on their own. More questions are now being answered in Community than resolved as cases.



Engagement is also being facilitated by our Now Platform integration:

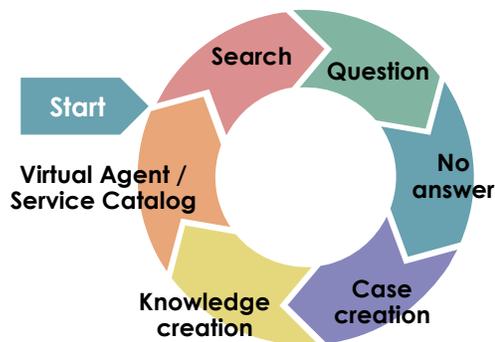
- **Automatic case creation.** If a customer asks a question in Community that isn't answered in 48 hours, a workflow is automatically triggered to create a case using the information from the question posted in Community, saving the customer time and effort.

- [Idea portal](#). Customers can share product, feature, change, and other ideas, then track the progress through a central review process. They can also browse, subscribe to, comment on, vote on, or track other ideas. ServiceNow product management reviews and responds to the ideas. Customers can also learn about features being considered for future releases.

**Knowledge Management.** Our KB library has 14 million views per year. Articles are accessible from the Service Portal, [Service Catalog](#), or Virtual Agent. The KB is one of the most popular ways for customers to educate themselves and find answers rather than submitting a ticket. TSEs also use [Knowledge Management](#) to access a wide variety of current content to solve issues.

In 2018, we moved to Knowledge-Centered Service (or KCS®), an industry best practice. TSEs create or update, then publish KB and Community articles in real time as part of the case resolution process. Machine learning is used to automatically send relevant KB articles to the assigned TSE as part of case creation.

KCS has eliminated redundant work and vastly sped up the timely distribution of relevant information. With so many articles available for previously solved and repeating issues, TSEs have more time to focus on more complex cases. The results speak for themselves:



- 200% more KB articles were created during the 18 months following the integration in 2018
- Monthly views of KB articles between January 2018 and January 2019 increased 202%
- TSEs resolve cases 5 days faster on average if an article is attached to a case file
- Cases where KB articles were attached were solved an average of 40% faster
- 24% of customers did not create a case because they resolved their issues via self-service (what we call the deflection rate)
- 40% of the KB articles were retired in 2018, thanks to the use of machine learning to find outdated content

The combination of a steady stream of new content and federated search results is paying off. The number of articles attached to cases has risen 3X, the number of internal views for support and troubleshooting has risen 2X, and the number of support and troubleshooting views that originate outside of ServiceNow has increased 47%.

## Case resolution focuses on faster time to relief

One of the biggest changes to the case submission and resolution process is the introduction of [Case Management](#). The submission process is now primarily online with 83% of cases being submitted through the Case Record feature on the Customer Support portal. Only 9% are

submitted via phone and 8% as part of the proactive monitoring of infrastructure, network, and hardware.

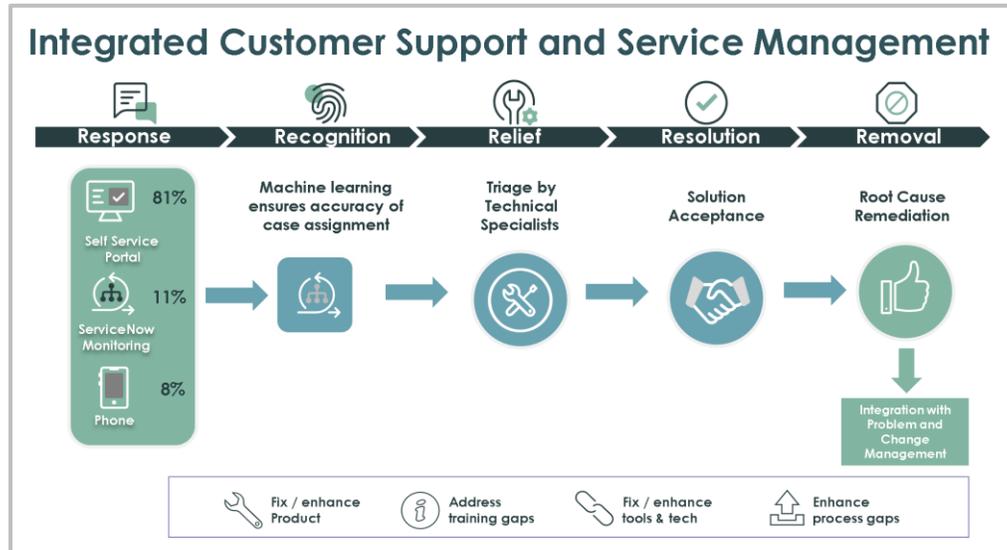


Figure 1- A typical case flow using Customer Service Management

The process is simpler, thanks to machine learning. Before submitting a case, customers are automatically presented with a set of search results to encourage them to find an answer and avoid waiting for a TSE. We've eliminated the need for a category so customers can focus on describing their issue and not finding the appropriate category or team to resolve their issue. Customers can drag and drop supporting files or screenshots to add to the case. We often prepopulate cases with information, saving data re-entry. These small changes have resulted in significant time savings for customers.

With more common issues being resolved via self-service, more complex issues now make up a greater percentage of TSE-assisted cases. We are using products such as [Predictive Intelligence](#) to improve our behind-the-scenes productivity and efficiency.

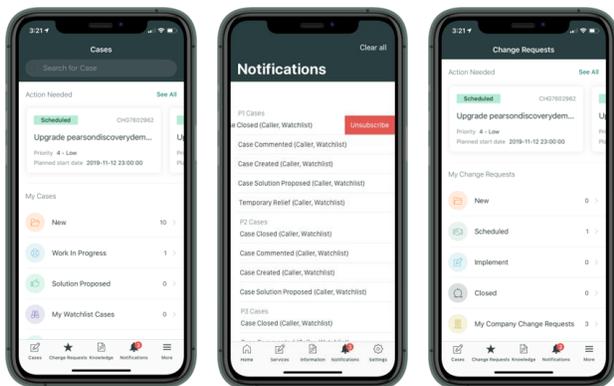
Machine learning is being used to optimize support workflows for assignment routing. Automated assignments have an accuracy rate on par with humans or better and save thousands of hours annually. When needed, managers can sort by region, agent availability, and number of assignments to align TSE skills to the case issue.

Handovers are smoother, thanks to technology that supports a follow-the-sun policy. More complex tasks and swarming practices bring in technical expertise as needed. In addition, tasks can be quickly and easily assigned to our Product Engineering, Product Development, and other teams as part of our integrated engineering environment. By involving other teams, we can ensure issues are addressed promptly at the source and minimize their impact on other customers.

## Benefits for stakeholders

Customers	TSEs	Product Operations	Business
Single point of access for all interactions	Automatic content updates on new issues	Easy to maintain and upgrade on the Now Platform	Consistent process execution across teams and geographies
Integrated support experience—with expanded self-service—for improved time to relief	Integrated dashboard follows natural workflow	Road test pre-release technology to improve product quality	Scale without adding resources
Monitoring aids in issue prevention and proactive case creation	Improved job satisfaction by focusing on more complex cases	Suggest product enhancements and report bugs	Define the product roadmap

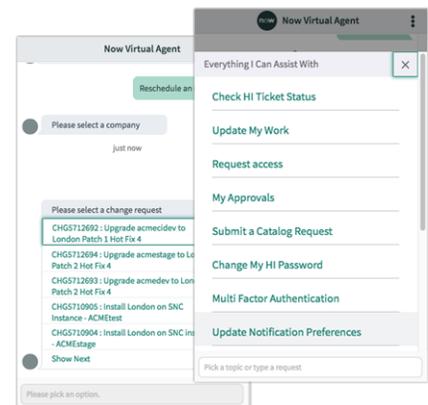
## Our latest technology adoptions



**Now Mobile app.** In late 2019, we began using a new mobile app as part of a pilot to perform admin tasks on our phones. Features range from managing cases to reviewing change requests, managing native notifications, accessing the Service Catalog, and creating cases.

**Virtual Agent.** A recent addition to our Support portal is the ServiceNow [Virtual Agent](#), an AI-driven, fully automated virtual assistant that delivers personalized, conversational navigation. Machine learning and natural language understanding (NLU) technology drive the agent, which serves as an alternative to Service Portal search.

It accesses Service Catalog automated workflows, which are being expanded to include case creation, updates, and information requests, as well as transfers to a human. Chatbot technology is still in its infancy but shows great promise as it matures.



## Future roadmap

ServiceNow is on a journey to digitally transform its operations according to its four guiding principles:

- Exceptional customer experience—as confirmed by a 9.1 out of 10 CSAT
- Accessible, world-class self-service—customer-personalized solutions provide access everywhere and maximize automation
- Shorter time to resolution—enhancing self-service options for low-priority issues
- Technology—Embracing ServiceNow Customer Service Management and Now Platform technologies to continually improve the customer experience

We realize customer support will never be a perfect science. But the capabilities found in Customer Service Management have helped us significantly improve the customer experience by providing easy-to-use self-service options, streamlining case creation and resolution, providing greater internal visibility, and enhancing the notification experience. TSEs have relevant information at their fingertips and can focus on solving more complex cases faster. We've seen the result of that strategy: happier customers as well as more productive and helpful support teams.

## Resources

To find out more about our Support strategy, read this recent blog, "[A holistic cure for what ails customer support.](#)"

If you're interested in learning more about Customer Service Management and its capabilities, you can visit the Now on Now [web site](#), contact your account representative or partner for a Now on Now briefing, or schedule a product [demo](#).

---

## Sidebar: Our two-phased implementation journey

We began our transition by compiling a list of requirements for the transition, such as:

- Incorporate 10 years of customizations from our old platform
- Preserve the best practices that gave us high CSAT scores
- Avoid downtime in the Customer Support instance
- Deliver a single pane of glass view so TSEs could focus on resolving issues
- Easily share product feedback with Product Development to further improve the product

The next step was outlining a two-phased implementation strategy to transition to Customer Service Management over 13 months. We chose to tackle the customer experience first to limit our risk. The Customer Release was completed in March 2019, with the Agent Release following in September.

**Phase 1 (Customer Release).** Phase one launched with incident process mapping. We identified 125 processes, then used ServiceNow [Project Portfolio Management](#) to track process updates/tasks. We were able to eliminate some processes, switch to out-of-the-box on others, and keep a few customized tasks where appropriate. For example, we adopted out-of-the-box features such as the Case Management plugin and form configuration, but customized internal best practices, such as scripts to convert companies/users to accounts/contacts and machine-learning customizations for the Service Portal ticket view.

To bridge the transition, we designed a temporary, bidirectional sync that mapped the fields between customers' case and incident records. Customers began using a case submission form to submit issues. The sync enabled us to update both the old Incident and new Case systems.

Our TSEs continued to work cases as incidents. Customers could access three years of legacy incidents as case records. Prior to the sync deployment, we performed two months of rigorous user acceptance testing by individual teams using end-to-end scenario testing. Cross-functional quality engineers addressed any issues that emerged. Extensive internal training ensured the deployment went according to plan.

**Phase 2 (Agent release).** In this phase, the bidirectional sync was no longer needed, and all cases were handled through Case Management. TSEs gained an integrated dashboard, [Agent Workspace](#), for better task management. Automated policies ensure P1 tickets are updated every 30 minutes and get immediate attention for fast resolution.

While Case Management was primarily deployed out of the box, we made some small customizations to meet our initial requirements, such as special handling notes migration, alert/event connections, and product taxonomy.

Our adoption of Customer Service Management includes several capabilities that were integrated over time. In Phase 1, we introduced Case Management to customers and Virtual Agent for search. In Phase 2, our Customer Support team transitioned to Case Management and we deployed [Predictive Intelligence](#). Customer Support Management is now fully integrated with IT Service Management, including Problem Management, Change Management, and Software Development Life Cycle (SDLC). We also integrated Flow Designer into our collaboration system. The only issues still handled as incidents are data center-related, such as HVAC failures.

A two-phase implementation enabled us to mitigate the impact on our customers while retaining our best practices. We were able to focus on the intent of the process workflow without being distracted by the tool integration. We adopted the out-of-the-box software, so release upgrades are much smoother compared to our old highly customized environment.

Throughout the deployment process we maintained our customer satisfaction rankings, with an NPS score of 54 and a CSAT score of 9.1, rankings that lead the industry. With fewer low priority cases to manage, the time for customers to obtain relief has fallen 50%. If we hadn't made any changes, our Support organization's volume of question cases would have more than doubled from 2018.

### Lessons learned

- Deeply understand your customers and agents (in our case TSEs) and their needs when designing new solutions
- Always keep the customer experience front and center in any decisions
- Automation is the key to faster self-service and requires a laser focus to ensure content is:
  - Centralized in one place
  - Can be retrieved from different repositories of information to improve relevancy
  - Can be searched from both internal platforms and external browsers
- Invest in emerging technologies like artificial intelligence, machine learning, and natural language understanding (NLU) for automation, while understanding that the payoff may be long-term
- Balance automation and the agent experience to build an environment that fosters innovation
- Provide relevant content at key points along the self-service route
- Provide collaborative systems for partners and customers to share, learn, and resolve issues before they submit a case

### TSEs Speak Out

- "There it was. Third KB in the list. Solution proposed in five minutes."
- "I'll never forget to do a search before trying to resolve a case again."
- "KCS really works. I created three articles while working on cases and the customer was very happy."
- "A fellow TSE found the solution to his case in less than 5 mins through a KB article I wrote on a highly complex case."

---

## ServiceNow

ServiceNow is changing the way people work. By defining, structuring, and automating work, we are creating a modern service experience for everyone in the enterprise. Our customers have demonstrated that service management isn't just for IT — it is a discipline for every service domain. It's possible now.

Now on Now is about how we use our own ServiceNow solutions to work faster, smarter, and better. With Now on Now, we're achieving true end-to-end digital transformation. To learn more, go to: [www.servicenow.com/nowonnow](http://www.servicenow.com/nowonnow).