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SERVICENOW CUSTOMER SERVICE MANAGEMENT ESSENTIALS (CSME)

Course Code: 821233

Attend Customer Service Management Essentials to master the core configuration and administration of the ServiceNow® Customer Service Management (CSM) product.

In this 3-day interactive course, attendees master the core configuration and administration of the ServiceNow® Customer Service Management (CSM) product. Through lectures, group discussions, and hands-on labs, participants build on existing knowledge and skills by applying implementation good practices. This course is designed for ServiceNow customers, partners, and employees who administer features, functions, and data associated with Customer Service Management.

What You'll Learn

Attendees master the core configuration and administration of the ServiceNow® Customer Service Management (CSM) product. .

Who Needs to Attend

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

Data analysis and student feedback show that students may struggle in this class if they have chosen to skip the prerequisite courses:

- Welcome to ServiceNow On Demand
- ServiceNow Administration Fundamentals Instructor-Led or On Demand
- ServiceNow Platform Implementation Instructor-Led or On Demand

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CLASSROOM LIVE	$2,700 USD	3 Day

Classroom Live Outline

- 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 Handing Notes and Targeted Communications
- Track the health of the business processes using analytics for Customer Service Management

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VIRTUAL CLASSROOM LIVE	$2,700 USD	3 Day

Virtual Classroom Live Outline

- 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 Handing Notes and Targeted Communications
- Track the health of the business processes using analytics for Customer Service Management

Sep 14 - 16, 2026 | 9:00 AM - 5:00 PM CDT

Sep 28 - 30, 2026 | 9:00 AM - 5:00 PM CDT

Oct 5 - 7, 2026 | 9:00 AM - 5:00 PM CDT

Oct 19 - 21, 2026 | 9:00 AM - 5:00 PM CDT

Nov 23 - 25, 2026 | 9:00 AM - 5:00 PM CST

Dec 14 - 16, 2026 | 9:00 AM - 5:00 PM CST

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ON-DEMAND	$0 USD

On-Demand Outline

- 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
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On-Demand Labs

- Lab 01 - Class Preparation
- Lab 02 - Consumers
- Lab 03 - Accounts, Contacts, and Hierarchies
- Lab 04 - Partners, Contacts, and Account Relationships
- Lab 05 - Asset Management - Products and Assets
- Lab 06 - Asset Management and CMDB
- Lab 07 - Asset Management - Services and Bundles

- Lab 08 - Service-aware Install Base
- Lab 09 - Service Contracts and Entitlements
- Lab 10 - Customer Service Groups and Skills
- Lab 11 - Account Teams and Responsibility Definitions
- Lab 12 - Configure Case Process
- Lab 13 - Customer Service Portal - Contact Administration
- Lab 14 - Customer Service Portal - Self-Registration
- Lab 15 - Consumer Service Portal - Self-Registration
- Lab 16 - Consumer Service Portal - Product Registration
- Lab 17 - Customer Service Portal - Partners
- Lab 18 - Customer Service Portals Commonalities
- Lab 19 - Targeted Communications
- Lab 20 - CSM Configurable Workspace
- Lab 21 - Customer Service Management with ITSM
- Lab 22 - Advanced Work Assignment
- Lab 23 - Case and Account Escalation
- Lab 24 - Major Issue Management

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PRIVATE GROUP TRAINING	3 Day

Visit us at www.globalknowledge.com or call us at 1-866-716-6688.

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