SERVICENOW FIELD SERVICE MANAGEMENT (FSM) IMPLEMENTATION

Course Code: 821236

Learn the practical skills to accelerate field service management implementations.

ServiceNow ® Field Service Management (FSM) helps companies efficiently manage location-based work tasks. Field Service Management Implementation focuses specifically on field service management applications and related functionality, most of which may be configured during an implementation using a low-code or no-code approach. Field Service Management Implementation provides practical skills to accelerate field service management implementations.

What You'll Learn

In this two-day interactive course attendees gain the skills for the effective implementation of the ServiceNow Field Service Management application. This course is designed for Implementation Specialists responsible for set-up and configuration of the Field Service Management applications. A combination of lecture, group discussions, group activities, and lab work helps attendees develop skills to achieve the following:

- Validate foundational data
- Analyze and implement customer business requirements
- Use industry good practice for field service management implementation
- Discuss common field service management integration scenarios and good practices
- Set-up field service business and assignment configuration
- Configure work order form and mandatory skills
- Create advanced maintenance plans and maintenance schedules
- Configure central dispatch and dynamic scheduling
- Automate transfer order line task assignment using flow designer
- Configure appointment booking service
- Configure advanced time recording and time sheet policy
- Create a targeted communication
- Configure contextual knowledge for work orders and work order tasks
- Configure field service mobile application

Who Needs to Attend

The ServiceNow® Field Service Management Implementation course is for Customers, Partners, and Employees who implement features, functions, and data associated with field service management.

Why Global Knowledge

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CLASSROOM LIVE	$1,900 USD	2 Day

Classroom Live Outline

Module 1: Field Service Management Implementation Planning

Topics:

- FSM features, process, and data review
- Field service industry good practices
- FSM implementation good practices
- Process Integrations
- Foundation data planning

Labs:

- Lab 1.1 Prepare to Implement Field Service Management

Module 2: Implementing Field Service Processes

Topics:

- Validate Foundation Data
- Configure Field Service Process, Assignment, and Add-ons
- Configure Work Order Creation
- Configure Time Recording

Labs:

- Lab 2.1 Validate Foundation Data
- Lab 2.2a Configure Approval Workflow
- Lab 2.2b Field Service Configuration
- Lab 2.3a Configure Mandatory Skills
- Lab 2.3b Create a Work Order Template
- Lab 2.4 Create an Advanced Maintenance Plan

- Lab 2.5 Configure Advanced Time Recording

Module 3: Optimizing Inventory & Scheduling Operations

Topics:
- Scheduling and Dispatch Configurations
- Dynamic Scheduling Configuration
- Parts Sourcing and Transfer Process automation

Labs:
- Lab 3.1a Configure Central Dispatch
- Lab 3.1b Configure Dynamic Scheduling
- Lab 3.2 Automate Transfer Order Line Task Assignment using Flow Designer

Module 4: Implementing Field Service Mobile

Topics:
- Agent Mobile Application Overview
- Field Service Mobile Configurations
- Mobile Migration Considerations

Labs:
- Lab 4.1 Configure VIP Tasks Applet

Module 5: Implementing Related Processes

Topics:
- Customer Experience Configurations
- Appointment Booking Configuration
- Configure Targeted Communications
- Configure Field Service Knowledge Base and Contextual Search

Labs:
- Lab 5.1a Configure Appointment Booking
- Lab 5.1b Appointment Booking – Advanced Availability Configuration
- Lab 5.2 Create a Targeted Communication and Notification
- Lab 5.3 Configure Contextual Knowledge for the Field Service Knowledge Base

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VIRTUAL CLASSROOM LIVE	$1,900 USD	2 Day

Virtual Classroom Live Outline

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- FSM features, process, and data review
- Field service industry good practices
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- Process Integrations
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Labs:
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SERVICENOW FIELD SERVICE MANAGEMENT (FSM) IMPLEMENTATION

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ON-DEMAND	$0 USD

On-Demand Outline

Welcome to Field Service Management Implementation On Demand!

- Welcome to Field Service Management Implementation On Demand!
- Request Participant Guide
- Request a Lab Instance
- Instance Help

Module 1 - Implementation Planning

- Field Service Management Solution Review Knowledge Check
- Prepare for a Field Service Management Implementation
- Organizational Change Management - Optional Video
- Contributors to a Successful Field Service Management Implementation
- Foundational Field Service Data and Relationships
- Foundational Field Service Data and Relationships - Demo

Module 2 - Implement Field Service Processes

- Field Service Configuration Options
- Field Service Configuration Options - Demo
- Configure and Manage Field Service Skills
- Configure and Manage Field Service Skills - Demo
- Field Service Work Order and Task Templates
- Field Service Work Order and Task Templates - Demo
- Work Order Templates - Debrief
- Field Service Questionnaires
- Field Service Questionnaires-Demo
- Planned Maintenance for Field Service
- Planned Maintenance for Field Service - Demo
- Advanced Time Recording for Field Service

- Advanced Time Recording for Field Service - Demo
- Optional Lab - Create a Time Sheet

Module 3 - Optimize Scheduling and Dispatch Operations

- Work Order Scheduling and Dispatch Operations
- Work Order Scheduling and Dispatch Operations - Demo 1
- Work Order Scheduling and Dispatch Operations - Demo 2
- Dynamic Scheduling Configuration
- Dynamic Scheduling Configuration - Demo 1
- Dynamic Scheduling Configuration - Demo 2
- Dynamic Scheduling Configuration - Debrief
- Field Service Part Sourcing and Transfer Automation
- Field Service Part Sourcing and Transfer Automation - Demo
- Part Sourcing and Transfer Automation - Debrief

Module 4 - Implement Related Processes

- Appointment Booking Configuration
- Appointment Booking Configuration - Demo
- Appointment Booking Configurations - Debrief
- Targeted Communications
- Targeted Communications - Demo
- Field Service Knowledge
- Field Service Knowledge - Demo
- Field Service Knowledge - Debrief
- Field Service Customer Experience Configuration Options
- Field Service Customer Experience Configuration Options - Demo
- Field Service Mobile Configuration Options

FSM Implementation Course Appendices

- Certified Implementation Specialist – Field Service Management Voucher Info

On-Demand Labs

- Lab - Prepare for Class Labs and Activities
- Lab - Validate Foundational Data
- Optional Labs - Explore Field Service Modules
- Lab - Configure Work Order Approval Workflow
- Lab - Field Service Configuration Settings
- Lab - Manage Skills
- Lab - Create a Work Order Template
- Lab - Create a Questionnaire
- Lab - Create an Advanced Maintenance Plan
- Lab - Configure Advanced Time Recording
- Lab - Configure Scheduling and Dispatch Tools
- Lab - Configure Dynamic Scheduling
- Lab - Automate Transfer Order Line Task Assignment
- Optional Lab - Configure Mandatory Skills

- Lab - Configure an Appointment Booking Service
- Lab - Configure Advanced Appointment Availability
- Lab - Create a Targeted Communication
- Lab - Configure Contextual Knowledge
- Optional Lab - Use the Now Agent Mobile Application

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PRIVATE GROUP TRAINING	2 Day

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