

SERVICENOW ACCOUNT LIFECYCLE EVENTS FUNDAMENTALS

Course Code: 835003

Learn Account Lifecycle Events is a process automation system that aims to streamline the onboarding process for customer accounts.

Account Lifecycle Events is a process automation system that aims to streamline the onboarding process for customer accounts. It provides a set of tools and resources, including a Process Automation Designer playbook, an Account Lifecycle Events case type, and defined case tasks for onboarding, which are designed to support and optimize the onboarding experience.

Key Components of Account Lifecycle Events:

1. **Dedicated case type and tasks:** It offers a centralized record for the onboarding team, with specific tasks assigned to automate and capture data efficiently.
2. **Playbook:** The playbook serves as a starting point for creating a repeatable onboarding process that aligns with business requirements, allowing for a more standardized and consistent onboarding experience.
3. **Data Capture:** The system allows the import, management, and publishing of data as part of the onboarding case tasks, ensuring that essential information is properly recorded and utilized.

High-level workflow of Account Lifecycle Events:

1. Customer Service Management initiates the process by creating a customer account. This action automatically triggers the creation of an account onboarding case.
2. The Account Lifecycle Events playbook is then launched, guiding the onboarding manager in managing the end-to-end workflow for the customer account onboarding.

Overall, Account Lifecycle Events provides a comprehensive solution to improve the efficiency and effectiveness of the customer onboarding process, enhancing the overall customer experience and operational performance.

What You'll Learn

- Demonstrate the ability to remember and apply Personas in the context of Account Onboarding.

- Articulate the components involved in the creation of a Data Import.
- Demonstrate proficiency in executing the steps required to configure Data Import Tasks.

Who Needs to Attend

Process Automation Designer, Onboarding Manager



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ON-DEMAND

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On-Demand Outline

Module 1: Account Onboarding

- Learn about the capabilities and functionality of Account Onboarding

Module 2: Lab Instance Help

- This content item provides lab instance guidance.

Module 3: ALE Lab Exercises

- Practice what you have learned and get hands-on experience with the Account Lifecycle Events (ALE) application.

Module 4: Bootcamp Video

- Account Lifecycle Events: Bootcamp Video - September 2023

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