

# Playbooks for Customer Service Management

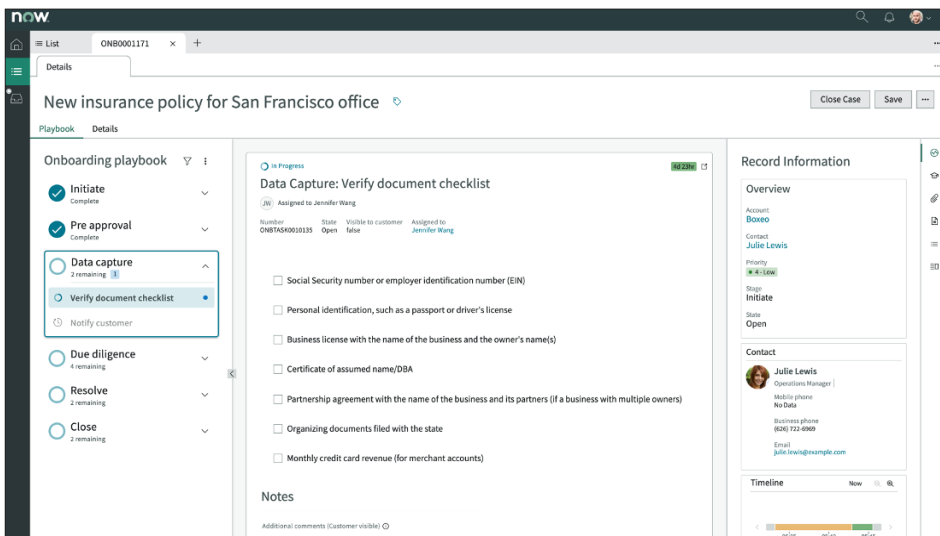
## Digitize and automate customer service processes

Many companies struggle to service customers—to onboard new accounts, resolve complaints, or process claims. Multi-step processes span disconnected teams and systems. These silos prevents companies from delivering an end-to-end digital experience, render agents helpless to connect with other teams quickly, limit executive's ability to pinpoint and address problems with service delivery, and drive up the cost of service. Agents lack visual guidance of the entire process lifecycle and can't monitor work being done by downstream teams.

## Streamline completion of playbook activities by using a focused layout

With Playbooks for Customer Service Management, organizations can automate complex customer service processes that span siloed teams and systems. They define the data, tasks, and automation needed to digitize these service processes. Playbooks' focused layout provides agents with a visual guide of the sequenced tasks required to resolve customer issues. They use visual cards to execute each step, with related records dynamically displayed for the current step.

Agents can review information and add to it, request information from or send information to customers, create tasks for other teams or customers, initiate workflows—anything needed to properly handle the issue, in the correct order, without skipping required steps. Playbooks empower agents to monitor the progress of downstream teams, give executives cross-team visibility to pinpoint process improvements, and reduce the cost of service.



Playbooks guide middle and front office agents through processes step-by-step.

## Scale customer service

Playbooks for Customer Service Management help agents resolve cases faster, increase productivity and first call resolution, and help organizations scale customer service. It is included in the Customer Service Management Professional and Enterprise packages. To learn more, visit [servicenow.com/csm](https://servicenow.com/csm).

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## Break down silos

Enable middle and front office teams to resolve customer issues quickly.

## Shift to digital faster

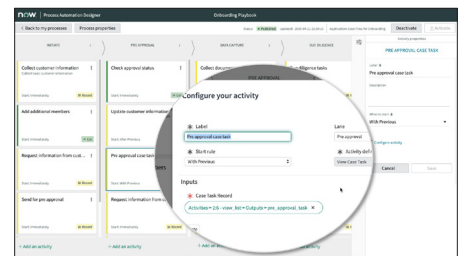
Define the data, tasks, and automation needed to digitize complex service processes using a visual Process Automation Designer. Speed playbook creation with packaged Case Playbooks on the ServiceNow Store.

## Increase agent productivity

Guide middle and front office agents through resolution steps and surface contextual recommendations in their Workspace while maintaining visibility into the end-to-end process lifecycle.

## Resolve issues more quickly

Empower customer service agents to monitor the progress of downstream teams and give visibility to every team involved in the resolution process.



Empower business users to configure processes using a visual designer.