Proactive Customer Service Operations

The challenge

As the availability of digital services and service-enabled products increases, the expectation of a positive customer experience rises along with it. As we know, outages can happen. The response to the outage can make all the difference to customers.

However, what often happens is a customer is the first to discover and report an outage. The customer service agent relays this information to an operations team, who go into fire-fighting mode following manual processes. The customer service and operations teams don't know what other customers might be affected by the issue. Agents become overwhelmed with a high volume of customer reports about the outage. All of this leads to extended downtime and major customer impact. It's the opposite of a positive customer experience.

The ServiceNow solution

Proactive Customer Service Operations in ServiceNow® Customer Service Management can prevent downtime by monitoring the health of customers' product and services to identify potential issues for resolution. If an issue can't be resolved immediately, customer service can notify the customers who are most likely to be affected. Knowing the issue is proactively being fixed can go a long way in reducing the customers' perceived impact of the issue.

Let's step through a scenario of how this can work:

Step 1: Network operations center operator (or service operations employee)

- Views an alert in the **Operator Workspace**, which monitors the service health and availability of the infrastructure and applications using a variety of analytics and machine learning techniques. The alert automatically creates an incident.

- Sees customers are affected by using the **Service-aware Install Base**. It tracks which products and services have been purchased by a customer and how they have been installed or provisioned, along with the detailed configuration for each installed item.

- Creates a **Proactive Case** to notify customer service that customers are affected by the incident.
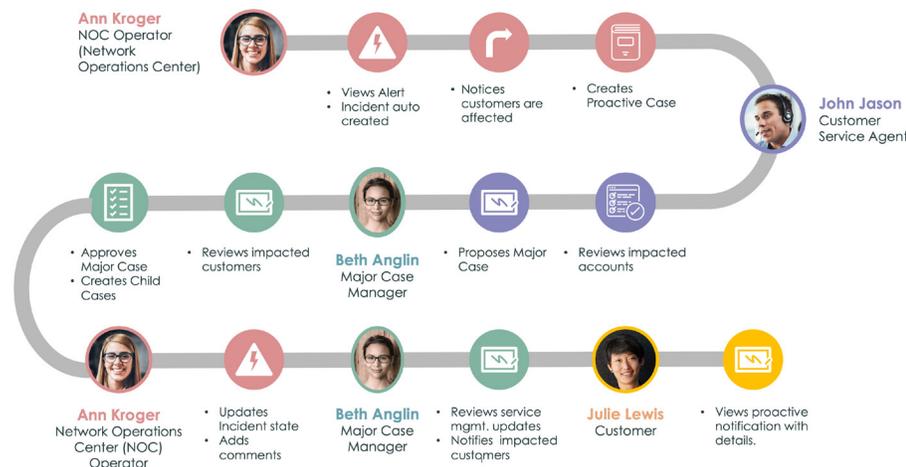
Proactive Customer Service Operations applies digital workflows to orchestrate from issue notification to resolution.

Detect issues as soon as they happen

Monitor infrastructure and applications using a variety of analytics and machine learning techniques to help operations detect, prioritize, and resolve issues faster.

Reduce mean-time-to-resolution (MTTR)

Enable agents and operations to quickly find products purchased or installed by a customer and pinpoint product components causing problems.

Reduce inbound calls and improve customer experience

Proactively monitor issues and trigger case workflows. Empower customer service agents to track service disruptions and notify only affected customers.

Increase agent efficiency

Group multiple cases related to an issue into a major case. Make it easy for customer service agents to stay informed and track the progress of teams resolving the issue.

Reduce future case volume

Identify opportunities for automation and improvement by monitoring proactive service trends, cases, and affected customers.

Step 2: Customer service agent

- Reviews the impacted accounts and receives guidance from **Predictive Intelligence** to propose a major case. Major cases are part of **Major Issue Management**, which is used to manage customer-facing communications and resolution processes for issues affecting multiple customers.

Step 3: Major case manager

- Reviews the affected customers and approves the major case. Child cases are automatically created for each of the customers and linked to the parent major case. Customers are notified via the child cases.

Step 4: Network operations center operator (or service operations employee)

- Updates the incident with progress on the resolution of the issue and estimated time of resolution. **Service Management for Issue Resolution** automates updates of the major case with the new incident information for viewing by customer service.

Step 5: Major case manager

- Reviews the major case for updates about the incident.
- The manager can add a customer-facing statement to the major case, which will update all child cases automatically. With one update to the major case, all impacted customers are notified.

Step 6: Customer

- Views case updates. The customer also can view outage information on the **Customer Service Portal**.

In the scenario above, workflows can be configured to automate the next steps in processing a proactive case after its creation. A proactive case can be proposed as a major case, or it can be directly promoted to a major case. If promoted directly to a major case, child cases can be created automatically when multiple customers are impacted.

A **dashboard for Proactive Customer Service Operations** helps customer service managers track key performance indicators (KPIs) to understand how proactive their teams were in identifying and communicating issues that impact customers. It also enables them to assess the business impact of outages over time. By monitoring proactive service trends, cases, and affected customers, they can identify opportunities for automation and improvement.

For more information about ServiceNow Customer Service Management, visit **servicenow.com/csm**.
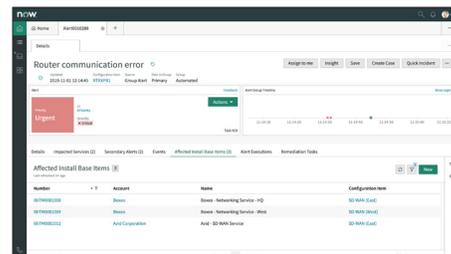
Proactively monitor issues and create a Proactive Case when customers are affected.
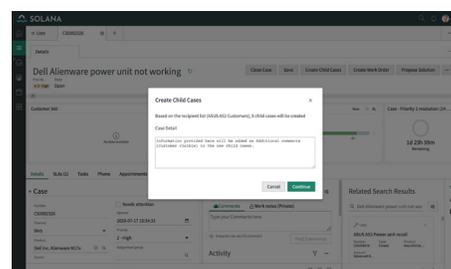
Use a major case in Major Issue Management to manage and resolve issues affecting multiple customers.

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Use the Proactive Customer Service Operations dashboard to monitor outages and identify opportunities to improve proactive service.

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