ServiceNow Training Storyboard Overview

⌖ Purpose

This training storyboard is designed to onboard the Customer Service Team to ServiceNow, replacing Zendesk. The training ensures team members are confident in navigating the new platform and managing customer service cases effectively. Go-live is scheduled for October 10, and training completion is required by October 8.

⚒ Tasks & Learning Objectives

- • Access and navigate their queue via myapps.microsoft.com and service-now.com/csp
- • Navigate the ServiceNow interface using navigation pane, favorites, and history
- • Customize views and reports to create personalized dashboards and access team metrics
- • Handle cases across channels (portal, chat, email, phone, API)
- • Resolve cases effectively using comments, attachments, and knowledge articles

🔍 Gaps to Address

- • Lack of familiarity with ServiceNow interface
- • Uncertainty around case lifecycle and escalation
- • Need for confidence in using dashboards and reporting tools

🎬 Storyboard Modules

Module 1: Introduction & Overview

Scene 1: AI avatar on screen with branded background

Narration: Welcome to your ServiceNow training! Starting October 10, we'll be using ServiceNow instead of Zendesk to manage customer service cases.

Visuals:

- Title slide: 'Welcome to ServiceNow'
- Timeline graphic: Zendesk → ServiceNow (Go-Live: Oct 10)
- Patient-first message overlay

Scene 2: Heading, Subheading text and video

Narration: This training will help you feel confident navigating the new platform so you can continue delivering excellent support to our customers

Text: Service Now Features

ServiceNow streamlines case management, enhancing our ability to deliver exceptional service.

Scene 3: AI video of case lifecycle

Narration: Each case follows a lifecycle: New → Awaiting Info → Resolved → Closed. You'll update the status as you work through each case. Once a case has been Resolved, after 4 days it will move to being Closed.

Visuals:

- Lifecycle graphic
- Counting and Closed animation/gif

Scene 4: Screen recording of ServiceNow homepage

Narration: Let's begin by accessing the ServiceNow platform. You can log in through myapps.microsoft.com and select the ServiceNow App, or use the direct URL. For quick access in the future, we recommend adding this link to your browser favorites.

Visuals:

- Screen recording

Module 2: Navigating the Platform

Scene 5: Heading, Subheading text and video

Narration: The CSM Workspace is your command center. From here, you can view detailed case information, update statuses and view open cases to best support your customers.

Text: Your Command Center

Your CSM Workspace is your central hub for managing customer service cases.

Scene 6: Screen recording of navigating CSM Workspace

Narration: Use the top navigation bar to search for Workspaces. Then, select CSM/FSM Configurable Workspace. This is where you'll manage your cases and tasks.

Visuals:

- Screen recording

Scene 7: Heading, Subheading text and video

Narration: Custom views have been tailored to meet your workspace needs. Use filters to focus on specific ticket types and priorities, to best enhance your workflow.

Text: Efficient Case Management

Scene 8: Screen recording of navigating to Case List

Narration: To access your queue, click on the 'List' icon in the left-hand navigation panel. This is where you'll manage your cases and tasks. From here, you can explore the Case List. Depending on your group, filters may already be applied to show relevant cases.

Visuals:

• Screen recording

Scene 9: Navigating Favorites & History

Narration: ServiceNow's navigation pane helps you move quickly between tasks. Use Favorites to pin frequently used views, and History to revisit recent activity.

Text:

Quick Navigation

Use Favorites and History to streamline your workflow

Scene 10: Favorites & History Demo

Narration: Click the star icon to add a page to Favorites. Use the clock icon to view your History and jump back to recent cases or dashboards.

Visuals:

Screen recording of adding to Favorites and accessing History

Module 3: Managing Cases

Scene 11: Heading, Subheading text and video

Narration: Assigning and escalating cases ensures they're handled by the right person or team.

Text: Assigning & Escalating Cases

Use the right tools to route cases effectively.

Scene 12: Screen recording of Assignment and Escalation in Action

Narration: Use "Assign to Me" to take ownership. Use "Assigned to" to delegate within your group. Use "Escalate" for urgent cases—this option is reserved for managers and team leads.

Visuals:

- Screen recording

Scene 13: Resolving Cases with Knowledge & Attachments

Narration: Use comments, attachments, and knowledge articles to resolve cases efficiently. These tools help you provide accurate and complete responses.

Text:

Resolving Cases

Use all available tools to close cases confidently.

Scene 14: Resolution Tools Demo

Narration: Add comments to communicate with customers, attach relevant files, and link knowledge articles for reference. These actions support resolutions and documentation.

Visuals:

Demo of adding comment, uploading attachment, linking knowledge article

Module 4: New Feature – Template Creation

Scene 15: Heading, Subheading text and video

Narration: Communicate efficiently using email templates and track internal requests with tasks.

Text: Communication & Collaboration

Templates and tasks streamline your workflow.

Scene 16: Screen recording of Email and Tasks

Narration: Click the template icon, search and apply a template, then edit and send. Use "Create a New Task" to request input from another team member.

Visuals:

- Screen recording

Scene 17: Multi-Channel Case Handling Overview

Narration: ServiceNow supports cases from multiple channels—portal, chat, email, phone, and API. Knowing the source helps you respond appropriately.

Text:
Multi-Channel Support
Understand where cases come from and how to manage them.

Scene 18: Multi-Channel Case Demo

Narration: In the Case Detail Panel, check the "Channel" field to see how the case was submitted. Use templates and knowledge articles to respond effectively.

Visuals:
Screen recording of case detail with channel field
Callout: "Channel: Chat | Portal | Email | Phone | API"

Module 5: Personalizing Your Workspace

Scene 19: Heading, Subheading text and video

Narration: Custom views have been tailored to meet your workspace needs. Use filters to focus on specific ticket types and priorities, to best enhance your workflow.

Text: Custom Views

Tailor your workspace to your priorities.

Scene 20: Screen recording of Creating Views & Filters

Narration: Click "My List" → "Add New List" → Select source (sn_customer). Create a filter for high-priority cases and save your view for quick access.

Visuals:

- Screen recording

Module 6: Notifications & Automations

Scene 21: Heading, Subheading text and video

Narration: Automated notifications help keep customers informed as cases progress. When a case moves to a new state—like "Awaiting Info"—ServiceNow can trigger a notification to the customer automatically.

Text: Automation in ServiceNow

Notifications triggered by case status changes keep customers in the loop.

Scene 22: Screen recording of Creating Views & Filters

Narration: If a case is moved to "Awaiting Info," an automated notification is sent to the customer. Other states and conditions also trigger notifications. These are configured to ensure timely updates and transparency. Analysts can refer to the full list of triggers provided by Srikanth or Gayatri, including screenshots and examples.

Visuals:

- Flow diagram showing status change → notification

- Callout: "Automated alerts based on case state"

  Placeholder: Screenshots of notification triggers (to be added by Srikanth or Gayatri).

Module 7: Tracking Performance

Scene 23: Heading, Subheading text and video

Narration: Dashboards help you track performance and team metrics at a glance.

Text: Dashboards & Reporting

Stay on top of your performance.

Scene 24: Screen recording of Dashboard setup and report scheduling

Narration: Create a dashboard, add widgets, and configure data sources. You can also schedule reports to share with your team.

Visuals:

- Screen recording

Module 8: Final Reminders

Scene 25: Heading, Subheading text and video

Narration: We go live on October 10. Complete your training by October 1. You've got this!

Text: Countdown to go-live

Reminder: Enroll by October 1