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, 2025, and training completion is required by September 22, 2025.

🛠 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

🧠 Judgment Calls & Rules

- • Decide when to escalate a case based on urgency or SLA
- • Choose appropriate knowledge articles to support resolution
- • Assign cases based on workload and expertise

🔍 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: Welcome & Why This Matters

Scene: AI avatar on screen with branded background

Narration: Welcome to your ServiceNow training! Starting October 10th, we'll be using ServiceNow instead of Zendesk to manage customer service cases. This training will help you feel confident navigating the new platform so you can continue delivering excellent support to our patients.

Visuals:

- • Title slide: 'Welcome to ServiceNow'
- • Timeline graphic: Zendesk → ServiceNow (Go-Live: Oct 10, 2025)
- • Patient-first message overlay

Module 2: Navigating to Your Queue

Scene: Screen recording of ServiceNow homepage

Narration: Let's start with how to find your queue. After logging in, you'll land on your homepage. From here, click on 'My Work' to view your assigned cases.

Visuals:

- • Cursor highlights 'My Work'
- • Zoom-in on ticket list
- • Callout: 'This is your queue'

Module 3: Exploring the Case Workspace

Scene: Screen recording of CSM Workspace

Narration: The Case Workspace is where you'll spend most of your time. Here, you can view case details, update statuses, and communicate with customers.

Visuals:

- • Highlight: Case list, case detail panel
- • Labels: 'Agent Assist,' 'Escalate,' 'Add Comment'

Module 4: Creating Views & Filters

Scene: Screen recording of customizing views

Narration: You can personalize your workspace by creating views. Use filters to focus on specific ticket types, priorities, or statuses.

Visuals:

- • Demo: Creating a filter for 'High Priority' cases
- • Tip overlay: 'Save your view for quick access'

Module 5: Handling & Resolving Cases

Scene: Screen recording of case lifecycle

Narration: Each case follows a lifecycle: New → In Progress → Awaiting Info → Resolved → Closed. You'll update the status as you work through each case.

Visuals:

- • Lifecycle graphic
- • Demo: Adding internal notes, attachments, using knowledge articles

Module 6: Dashboards & Reporting

Scene: Screen recording of dashboard view

Narration: Use dashboards to track your performance and team metrics. You can view open cases, resolution times, and SLA compliance.

Visuals:

- • Personal dashboard
- • Team metrics panel
- • Callout: 'Use this to stay on track!'

Module 7: Practice & Support

Scene: AI avatar returns

Narration: You'll have time to practice in a test environment before go-live. If you have questions, reach out to your team lead or check the knowledge base.

Visuals:

- • Checklist: 'Practice, Ask Questions, Use Resources'
- • Link to internal support page (if available)

Module 8: What's Next

Scene: Final screen with key dates

Narration: Remember, we go live on October 10th. Make sure you complete your training by September 22nd. You've got this!

Visuals:

- • Countdown to go-live
- • Reminder: 'Enroll by Sept 22'