Training Intake Questionnaire

Use this template to capture the learning need, audience, critical tasks, delivery approach, and success measures. Keep answers concise and action-oriented. Add links to supporting materials where helpful.

Project Summary

Project / Request Name: Customer Service - Service Now Training	
Requestor & Department: Brandon Ly / IT	
Date	2025-08-19
Target Go-Live / Deadline: 10/3/2025	
Primary Audience(s) / Locations: Customer Service/US	
Key Stakeholders / SMEs / Approvers: Brandon Ly / Yugveer Singh / Erica Weese	
Constraints / Risks (tech, compliance, bandwidth)	
Links to Source Materials (SOPs, maps, KB, recordings)	

Business Need & Outcomes

1. What problem are we solving, and why now?

Response: We are migrating the customer service ticketing solution from Zendesk to Service now and need to ensure our customer service agents know how to use Service Now to work tickets

2. What does success look like in behavior and business terms (KPIs)?

Response: If there are no tickets/emails on how to use the tool, that would define success, in addition the expectation is that tickets opened by our customers are resolved in a timely manner meeting our SLA’s

3. What happens if we don't address this (risk/impact)?

Response: The risk is tickets opened by customers are not resolved in our SLA terms and provides a poor customer experience.

Audience & Context

4. Who is the audience (roles, headcount, locations/time zones, languages)?

Response: The audience is majority customer service agents within the US, ranging across PST, CST and EST.

5. Any constraints we must design for (shifts/coverage, devices, bandwidth, accessibility)?

Response: N/A

Tasks & Learning Objectives

6. What 5–7 tasks must learners perform immediately after training (prioritized)?

Response:
The training must include the steps below and after training the analysts must have hands on to following:

- Introduction & Platform Basics including Navigation pane, favorites, history. Searching and filtering records
- CSM Workspace Deep Dive - Agent Assist, Case List, Case Details, Escalation process. Case lifecycle New → In Progress → Awaiting Info → Resolved → Closed
- Omnichannel case creation scenarios (Portal, Chat, email)
- Case handling and resolution - Case Assignment & Ownership, Adding comments, attachments, Using knowledge articles

- Dashboards & Reporting - Viewing personal performance, Understanding team metrics

7. What decisions/judgment calls must they make—and what rules guide those decisions?

Response:

8. Where are the current gaps (skills, process, tools) that training should close?

Response:

Content & SMEs

9. What existing SOPs, process maps, job aids, or recordings should we leverage?

Response:

10. Who are the SMEs and approvers?

Response:

Delivery & Experience

11. Preferred or required modality (**self-paced**, vILT, ILT, blended) and target seat time?

Response:

12. What real-world scenarios or data can we use for practice?

Response:

Assessment & Measurement

13. What must learners demonstrate to pass (critical behaviors and errors to avoid)?

Response:

14. How will we measure impact post-launch (KPIs, baseline, reporting cadence)?

Response:

Rollout & Sustainment

15. Key dates/milestones (pilot, go-live) and audiences for the first release?

Response:

16. Manager role in on-the-job practice (shadow → guided reps → solo) and reinforcement?

Response:

17. Who owns content updates and how frequently will things change?

Response: