

# What digital workflows are key to Customer Service Management?

Questions addressed:

Page 1:

- What systems are key to digitizing customer service workflows when serving external customers?

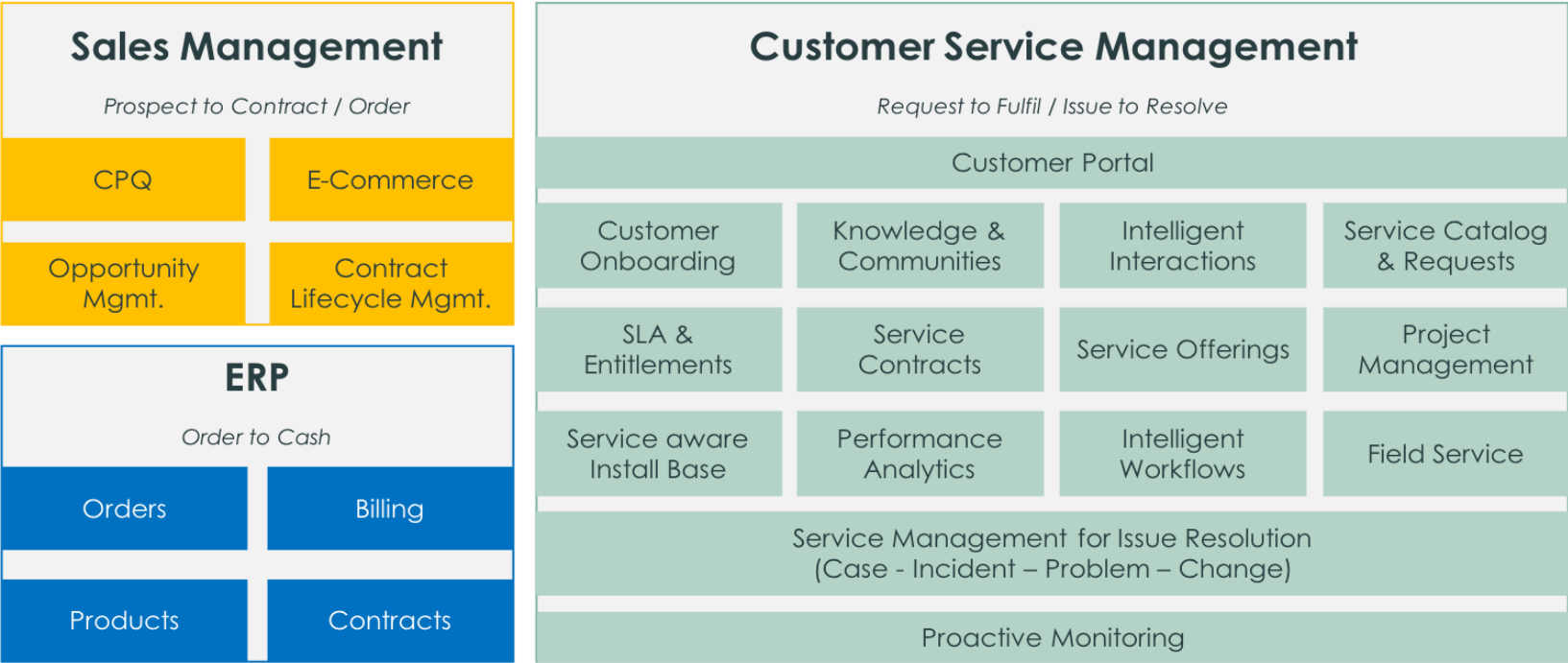
Page 2:

- How does work flow across Sales Management, ERP, and Customer Service Management Systems?

## What systems are key to digitizing customer workflows when serving external customers?

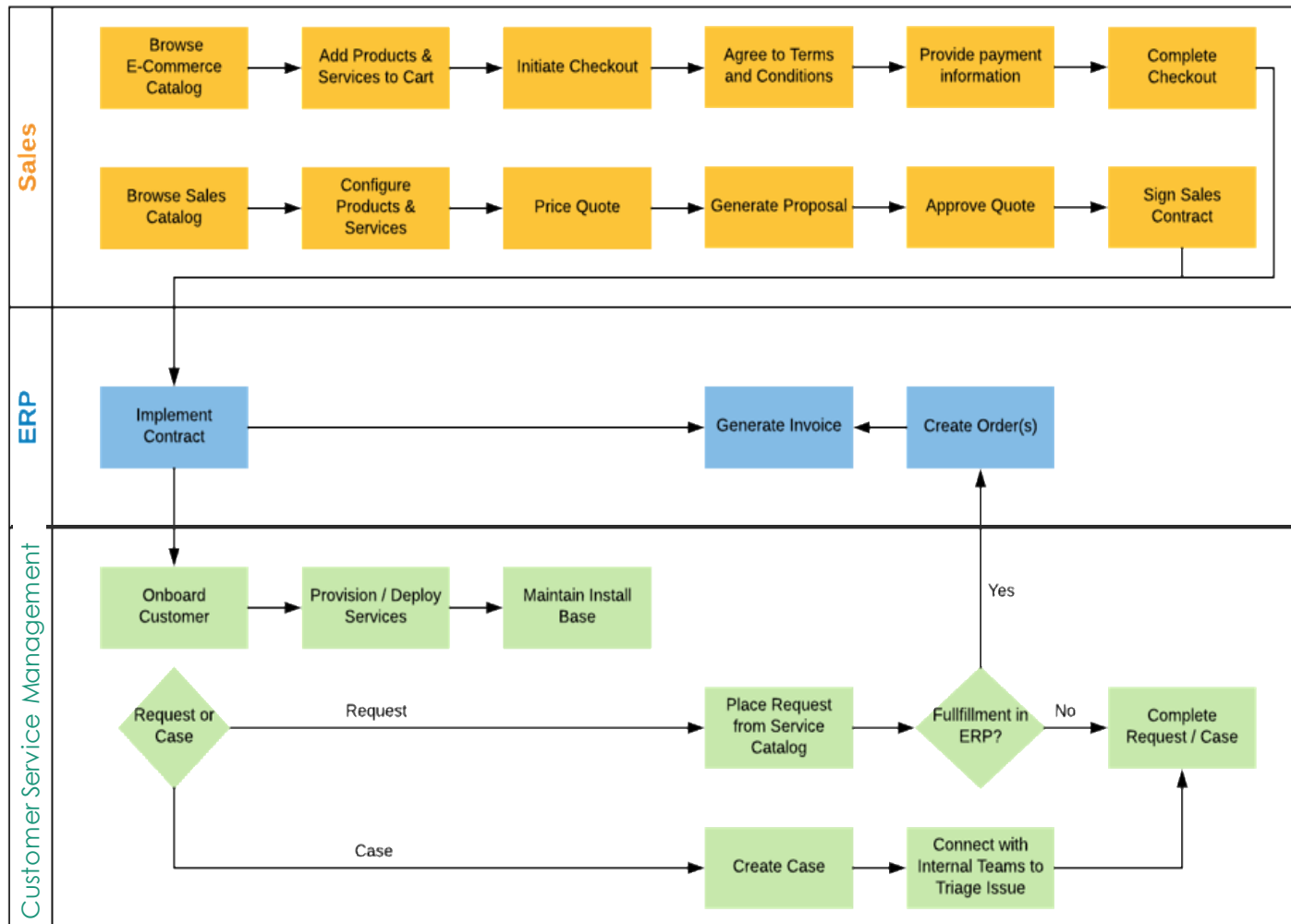
Digitizing and automating customer service workflows to deliver a seamless user experience requires three key systems:

- **Sales Management**– Used to engage prospects and guide them through the sales process (either direct sales and/or e-commerce) to arrive at an agreed quote and signed contract
- **ERP** – Provides the system of record for sales contracts, orders, fulfillment, billing, and invoices
- **Customer Service Management**– Used to onboard customers, fulfil their requests, and resolve their issues



# What digital workflows are key to Customer Service Management? (Cont.)

How does work flow across Sales Management, ERP, and Customer Service Management?



## Sales Management:

- **Direct sales** – Displays the sales catalog for product selection, then provides a quote in response to the customer request
- **E-commerce** – Speeds up the sales process by enabling online payment but typically provides less flexibility into product configuration and pricing

## ERP:

- Creates and manages products, sales contracts, orders, and invoices

## Customer Service Management:

- Onboards customers and contacts, displays a catalog of contracted services, manages the install base of products and services, and enables proactive servicing of issues

*If you have any questions on this topic or you would like to be a contributor to future ServiceNow best practice content, please contact us at [best.practices@servicenow.com](mailto:best.practices@servicenow.com).*