

# How do I use ITSM with Customer Service Management?

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- How do I use Incident and Problem Management to support Case Management?
- How do I use Change Management to support Case Management?

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[Customer Service Management](#) helps customers with a technical customer support function to use [IT Service Management](#) (ITSM) processes like Incident and Problem Management to resolve customer issues. You cannot use these ITSM products included with Customer Service Management to support internal employees' IT support needs—for that, you need an ITSM license.

## What ITSM products are available with my Customer Service Management license?

Product/feature	Included in ITSM	Included in CSM
Incident Management	X	X
Change Management	X	X
Problem Management	X	X
Service Catalog and Request Management	X	X
CMDB	X	X
Knowledge Management	X	X
Case Management		X
Account Management		X
Contract and Entitlement Management		X
Product and Asset Management	X	X
Communities		X

## When should I introduce ITSM and/or Customer Service Management products?

### If you have ITSM already:

- Introduce Customer Service Management when you have dedicated, separate teams providing technical support to external customers and a customer service function to manage customer relationships.
- Case Management (included in Customer Service Management) will provide a single record type for managing customer support.

### If you start with Customer Service Management:

- Introduce ITSM to optimize technical support processes while maintaining a simple and consistent customer experience.
- It's ideal for supporting technical products and services.

## How do I use Incident and Problem Management to support Case Management?

Technical support agents can create incidents from cases in the event of service disruptions and assign them to internal departments for resolution. Changes and problems can also be created by technical support as needed to resolve incidents.

## How do I use Change Management to support Case Management?

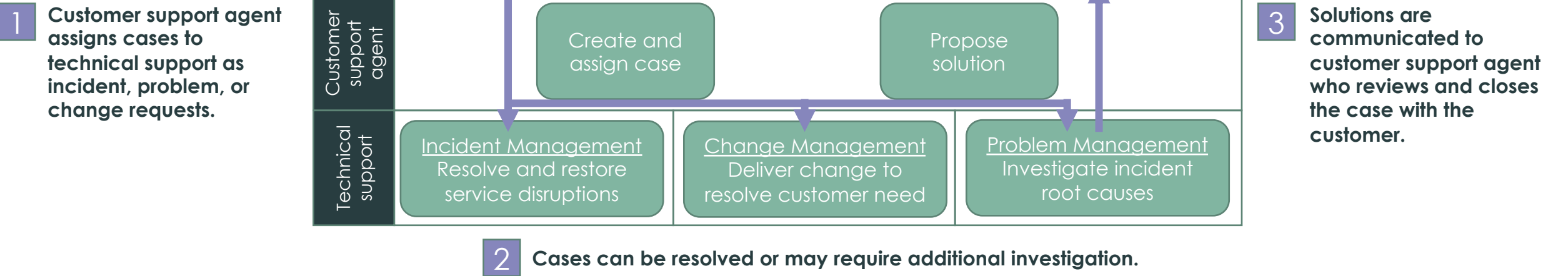
Technical support agents can create change requests if they identify that the customer needs something requiring a change, and they can provide all the information needed to support the change. The support agent will need to notify the change implementer and agree to a date for the change. Changes can also be created as needed to resolve incidents or to address requests submitted through request management.

# How do I use ITSM with Customer Service Management? (Cont.)

## Why should I use ITSM products with Case Management?

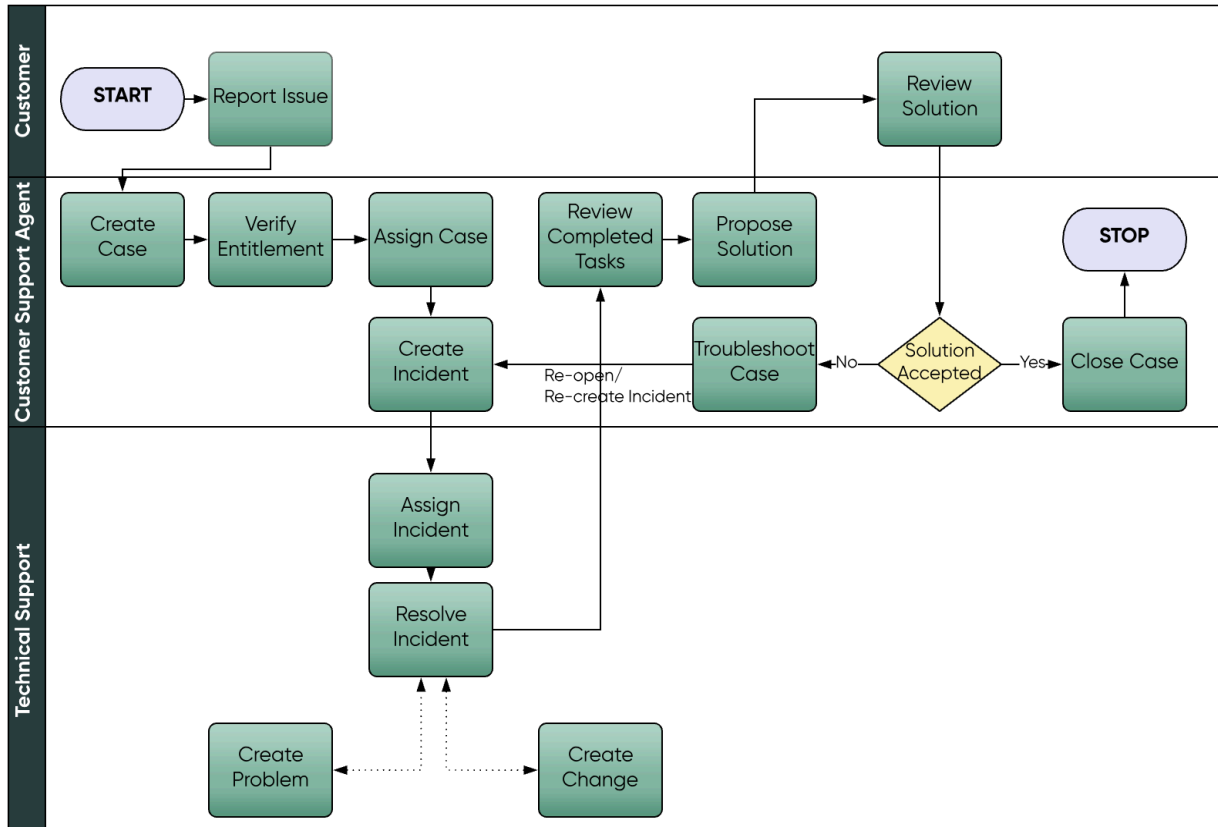
Case Management helps your customer service agents track and manage customer interactions—but some issues require help from technical support specialists for fast resolution. ITSM products let technical support functions manage and resolve these issues effectively, while Case Management provides the “connective tissue” between your customers’ issues and steps taken outside your customer service organization to resolve these issues. **By using ITSM and Case Management together, you pair effective management and tracking with effective customer issue resolution.**

You can create **incidents**, **changes**, **requests**, and **problems** from Case Management.



# How do I use ITSM with Customer Service Management? (Cont.)

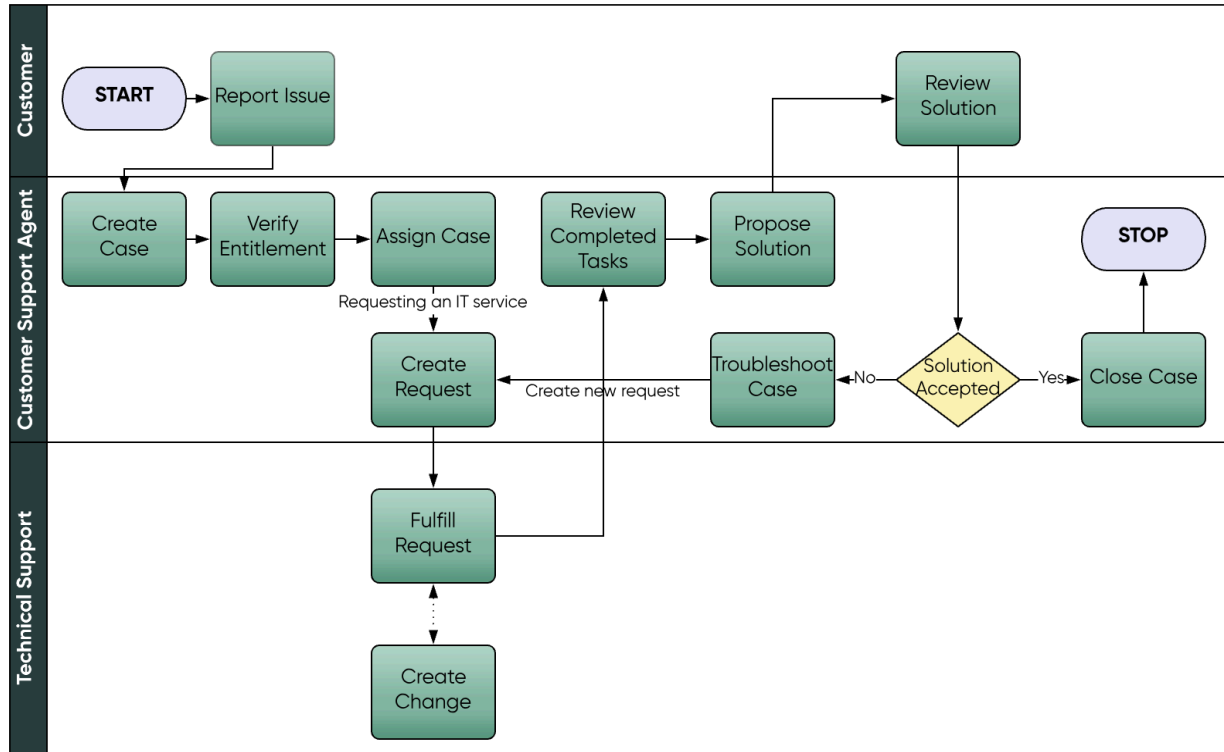
## Case Management – Incident Management workflow



Task	Procedure	Role	Input	Output
<b>Create case</b>	Create a case to capture an issue or a request submitted by the customer through a valid support channel.	Customer support agent	Customer information, impacted product, issue description	Case
<b>Verify entitlement and assign case</b>	Validate the customer and product information, determine the level of support, and assign the case.	Customer support agent	Case	Assigned case
<b>Raise to technical support</b>	Identify that there is an issue with a technical product or service and raise an incident.	Customer support agent	Assigned case	Incident
<b>Assign incident</b>	The technical support first line will deal with the incident if possible, otherwise they will assign to a second- or third-line support agent. If automated assignment is implemented, this will not require agent involvement.	Technical support/ automation	Incident	Assigned incident
<b>Resolve incident</b>	Triage and investigate the incident. Identify and apply a resolution. A change may need to be raised to apply the resolution. A problem may need to be raised if there is a root cause to be addressed.	Technical support	Assigned incident	Resolved incident
<b>Review resolved incident</b>	Review the completed incident to confirm the actions taken and solutions applied.	Customer support agent	Resolved incident	Proposed solution
<b>Propose solution</b>	Notify the customer with the availability of the solution that can resolve the reported issue.	Customer support agent	Proposed solution	Solution accepted/ rejected
<b>Troubleshoot case</b>	Review reason for rejection. Reopen the existing incident or raise a new one if necessary.	Customer support agent	Solution rejected	Solution accepted
<b>Close case</b>	Close the case upon resolution. Capture closure information.	Customer support agent	Solution accepted	Closed case

# How do I use ITSM with Customer Service Management? (Cont.)

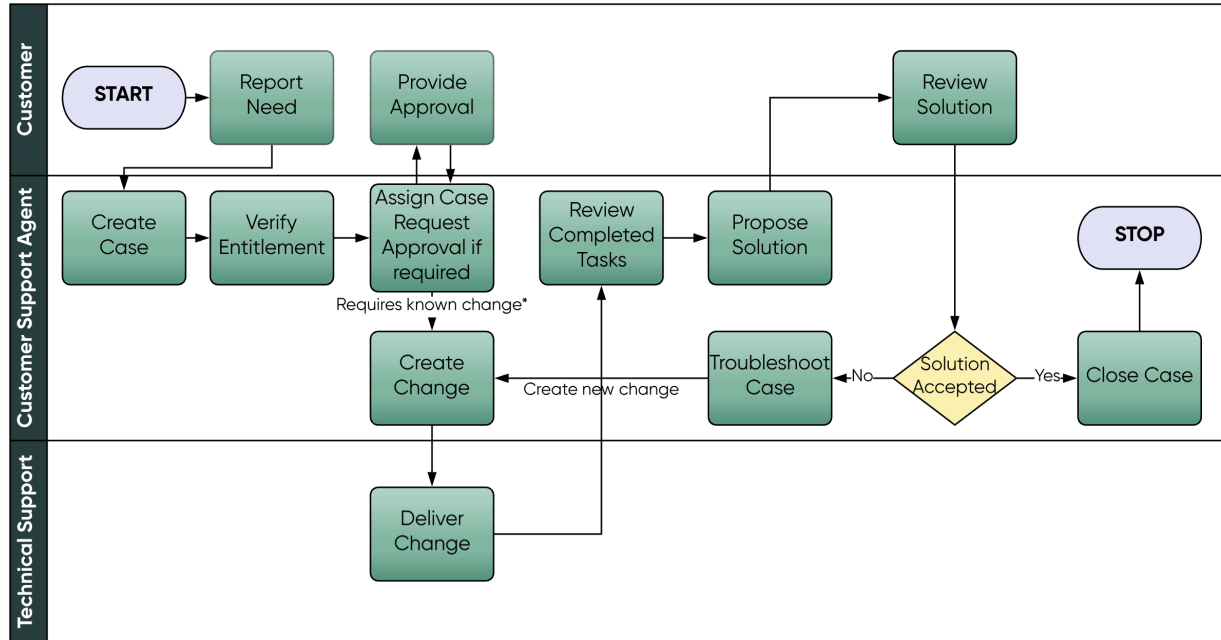
## Case Management – Request Management workflow



Task	Procedure	Role	Input	Output
Create case	Create a case to capture an issue or a request submitted by the customer through a valid support channel.	Customer support agent	Customer information, impacted product, issue description	Case
Verify entitlement and assign case	Validate the customer and product information, determine the level of support, and assign the case.	Customer support agent	Case	Assigned case
Raise to technical support	Identify that the customer is requesting something.	Customer support agent	Assigned case	Request
Assign requested item/catalog tasks	Requested items and the associated catalog tasks will be automatically created and assigned to the correct team.	Automation	Request	Assigned requested items/catalog tasks
Complete request	Assigned technical support teams fulfil their catalog tasks to complete the request.	Technical support	Assigned requested items/catalog tasks	Completed request
Review completed tasks	Review the completed request to confirm the actions take and solutions applied.	Customer support agent	Completed request	Proposed solution
Propose solution	Notify customer with the availability of the solution that can resolve the reported issue.	Customer support agent	Proposed solution	Solution accepted/rejected
Troubleshoot case	Review the reason for rejection. Reopen the existing incident or raise a new one if necessary.	Customer support agent	Solution rejected	Solution accepted
Close case	Close the case upon resolution. Capture closure information.	Customer support agent	Solution accepted	Closed case

# How do I use ITSM with Customer Service Management? (Cont.)

## Case Management – Change Management workflow

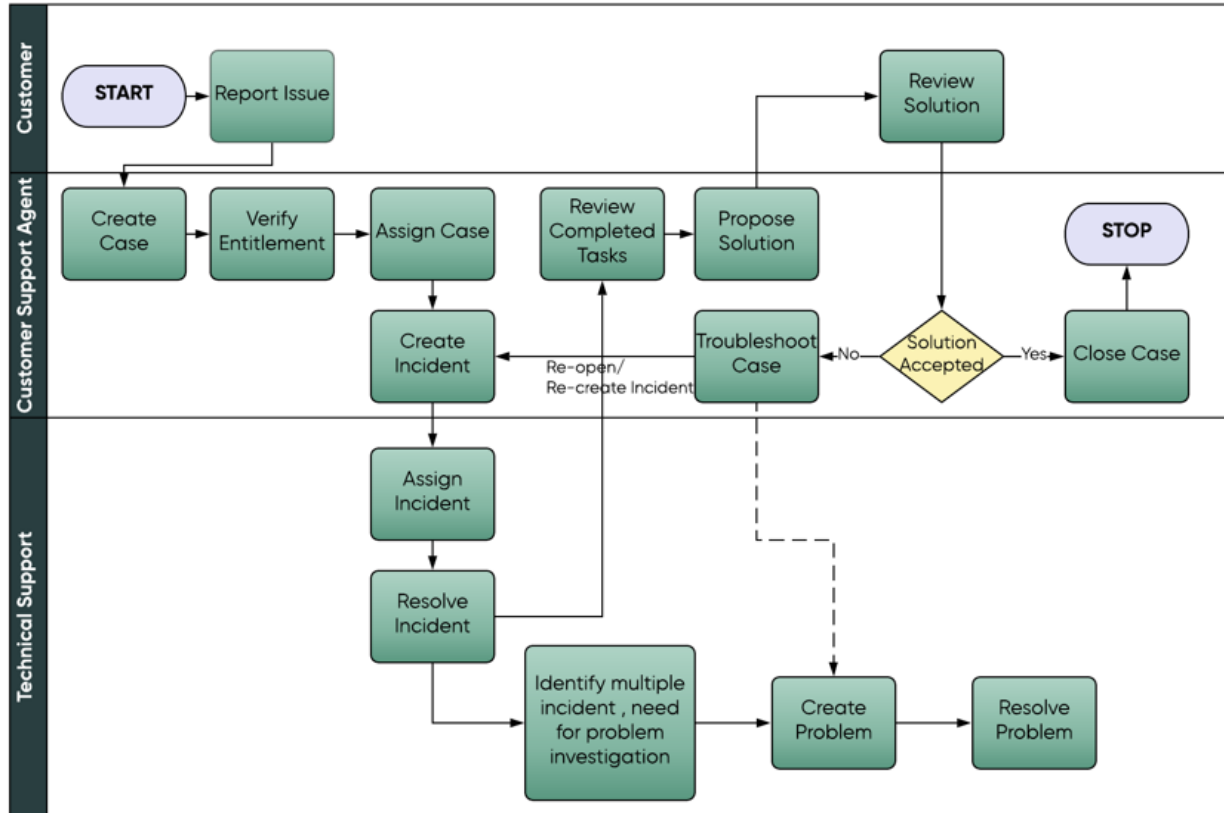


\*Known changes are those where the Customer Support Agent knows the implementation steps, backout plan, test plan, risk levels etc in order to complete all the required information

Task	Procedure	Role	Input	Output
Create case	Create a case to capture a need submitted by a customer through a valid support channel.	Customer support agent	Customer information, impacted product, issue description	Case
Verify entitlement, assign case, request customer approval	Validate the customer and product information, determine the level of support, and assign the case. Request approval from the customer via the case.	Customer support agent	Case	Assigned case
Provide approval	Provide approval for the change to proceed.	Customer	Assigned case	Approved case
Raise to technical support	Identify that the customer needs something that will require a change. Raise a change request if you're able to populate all the required information.  *Note that the CSA will need to notify the implementer and agree to dates if they are not the implementer themselves since the change will go straight into the lifecycle once raised.	Customer support agent	Approved case	Change
Implement change	Change is implemented following the agreed plan at the approved time and tested for confirmation of success.	Technical support	Change	Completed change
Review completed change	Review the completed change to confirm the actions taken and solutions applied.	Customer support agent	Completed change	Proposed solution
Proposed solution	Notify the customer with the availability of the solution that can resolve the reported issue.	Customer support agent	Proposed solution	Solution accepted / rejected
Troubleshoot case	Review the reason for rejection. Raise a new change if necessary.	Customer support agent	Solution rejected	Solution accepted
Close case	Close the case upon resolution. Capture closure information.	Customer support agent	Solution accepted	Closed case

# How do I use ITSM with Customer Service Management? (Cont.)

## Case Management – Problem Management workflow



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Task	Procedure	Role	Input	Output
<b>Create case</b>	Create a case to capture an issue or a request submitted by a customer through a valid support channel.	Customer support agent	Customer information, impacted product, issue description	Case
<b>Verify entitlement and assign case</b>	Validate the customer and product information, determine the level of support, and assign the case.	Customer support agent	Case	Assigned case
<b>Raise to technical support</b>	Identify that there is an issue with a technical product or service and raise an incident.	Customer support agent	Assigned case	Incident
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<b>Review resolved incident</b>	Review the completed incident to confirm the actions taken and solutions applied.	Customer support agent	Resolved incident	Proposed solution
<b>Identify need for problem</b>	Multiple incidents show a trend toward a deeper cause that needs investigating, or an incident could only be resolved temporarily with a workaround and requires further investigation to understand the cause. Problem record is raised.	Technical support	Resolved incident	Problem
<b>Resolve problem</b>	Problem investigated, root cause discovered, and fix applied.	Technical support	Problem	Resolved
<b>Propose solution</b>	Notify customer with the availability of the solution that can resolve the reported issue.	Customer support agent	Proposed solution	Solution accepted/ rejected
<b>Troubleshoot case</b>	Review the reason for rejection. Reopen the existing incident or raise a new one if necessary.	Customer support agent	Solution rejected	Solution accepted
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